

Illinois State University
Katie School of Insurance and Financial Services

26th Annual Insurance Executive Forum

COMPETITION:

the Name *of the* GAME

Breakfast Seminar

for Insurance Executives & Risk Managers



KATIE SCHOOL
OF INSURANCE AND
FINANCIAL SERVICES
Illinois State University

October 26, 2016 | 8:00am - 11:00am

Union League Club - Chicago, Illinois

Program Overview

In the rapidly changing and evolving insurance industry, competition is growing even stronger as technological innovations, reputation challenges, enhanced connectivity, evolving risk-transfer options, emerging capital sources, the sharing economy, and weak connections with next-generation prospects create disruption in the traditional business models. We invite you to join us as a panel of industry executives discusses how the industry will need to constantly innovate to mitigate the impact of these emerging strategic threats and capitalize on the opportunities offered. They will answer questions like the following.

- *How do companies meet customer expectations while shifts in the economy and culture and new categories of exposures that are emerging threaten their traditional business models?*
- *How are insurers moving to reinvent their products, systems, and business models to meet customer expectations?*
- *How do companies compete in a time when brand loyalty has eroded and they can no longer count on attracting and retaining customers based on long histories, high brand recognition, and extensive agent network?*
- *How do insurers compete with the online shopping and purchase options at their customers' disposal?*
- *Will insurers partner with new types of distributors and aggregators to provide alternative distribution outlets and offset the risk of customers moving to other distribution systems?*
- *How do agents respond to the challenge of web aggregators, direct sellers, and social brokers that challenge their traditional role?*
- *With the rapidity of change, how can companies ensure that strategies remain relevant and that new strategies are implemented to drive new products and services and competitive demand?*
- *Will alternative capacity sources undermine traditional insurer dominance and prompt more mergers and acquisitions to build size, cut costs, and add capabilities?*
- *What strategies has your company implemented to adjust to and leverage technological advances that can wreak havoc on traditional modes of conducting business?*
- *What are some of the emerging risks that offer both growth opportunities and bottom-line risks?*

WHO SHOULD ATTEND?

- **Insurance company CEOs, CFOs, managers, and underwriters** who need to know what the competition is doing to meet the challenges that lie ahead.
- **Risk managers** who must anticipate future needs to protect the company's assets and income against a broad array of risks associated with the business.
- **Strategically oriented brokers** who interface between buyers and sellers and need to be more knowledgeable about the future of the industry.
- **Reinsurance brokers** who seek to become the solution providers to the risks they are placing.
- **Bankers and market analysts** who need to keep pace with the changes and emerging trends in the insurance and financial services environment.

SCHEDULE

- 7:30am** Registration and coffee
- 8:15am** Breakfast
- 9:00am** Panel discussion with industry leaders and audience participation
- 11:00am** Closing remarks

MODERATOR

Millie Workman is Director of Training and Education at International Risk Management Institute (IRMI).

SPEAKERS

Mike Brennan is President of Brokerage Division of CRC Wholesale Group. With almost 30 years of industry experience, Mike began his career at Arthur J. Gallagher & Co. as an Account Executive and then moved to Alexander Howden North America, which ultimately became Swett & Crawford, in 1992. He has served in various capacities at Swett, including Broker, Assistant Vice President, Vice President, Casualty Manager, Sales & Division Leader, and CEO of Wholesale. Mike has contributed to Swett initiatives in the Casualty Practice Group, including training and recruiting. He holds a Bachelor of Science degree from Marquette University.

Rick Gulliver is President of HUB International Limited. He oversees HUB's mergers and acquisitions activity in addition to serving on the corporate Executive Management Team. Rick has more than 35 years of leadership and experience acquiring, building and operating insurance brokerage firms. Under his leadership and direction HUB has acquired more than 400 acquisitions representing over \$1 billion in revenue. Rick began his career in January 1977 by opening a small, one-man shop in Leamington, Ontario which continues today as a HUB International operation. He was instrumental in creating Insurance Network Solutions in 1995 where he served as President. He was also President of HUB Group Ontario Ltd. and its subsidiary Gulliver Insurance Brokers. He played a pivotal role in the formation of HUB International and has been actively involved in its development and growth. He is a founding Board Director and past member of the Insurance Industry Charitable Foundation (IICF) receiving the Trailblazer Award in 2013 for distinguished dedication to local nonprofits. He is also A World Fellowship Member of the Duke of Edinburgh Award. Rick attended University of Western Ontario and has achieved the designation of Chartered Insurance Professional (CIP) from the Insurance Institute of Canada.

Sabrina Hart is the Midwest Regional Executive for Zurich North America. Sabrina is responsible for leading the regional leadership team in executing the overall Zurich strategy. Her focus is on achieving financial performance, embedding operational improvements, driving a consistent customer, broker, and employee experience, and embedding the Zurich Commitment with community investments. Sabrina leads with passion in providing effective insurance and risk management solutions for customers and brokers delivered by a highly engaged team at delivering "One Zurich". Prior to this role, Sabrina served as the Chief Underwriting Officer for Zurich Global Corporate in North America, where she was responsible for overseeing the underwriting of all corporate lines of business and responsible for the management of all market-facing underwriting functions. Sabrina's honors include being named to Business Insurance's "2013 Women to Watch", the Insurance Networking News "2013 Women in Insurance Leadership Award", and the Chicago Business Journals "Chicago Women of Influence 2016". She is also the co-founder of Zurich's Women's Innovation Network (WIN). Sabrina earned her bachelor's degree in mathematics from the University of North Carolina, where she now serves on the Board of Visitors. She, also, currently serves on the Board of Governors at St. Joseph's University Haub School of Business Academy of Risk Management and Insurance. She holds a Board position on the Chicagoland Chamber of Commerce and the Midwest Insurance Industry Charitable Foundation (IICF). Sabrina has also earned a certificate in Strategic Management from the Kellogg Business School at Northwestern University.

Craig Kliethermes is President and Chief Operating Officer of RLI Corp. He responsible for the insurance operations and serves as President of RLI Corp's insurance subsidiaries: RLI Insurance Co., Mt. Hawley Insurance Co., and Contractors Bonding and Insurance Co. These responsibilities include the overall direction of the companies; underwriting, claim and branch operations. Craig joined RLI in 2006 from Lockton Companies in Kansas City, where he was Sr. VP & Director of quantitative analysis. He previously held executive positions with GE Insurance/Employers Reinsurance and John Deere Insurance Company. He graduated magna cum laude from Maryville College in St. Louis.

Julie Pemberton is the Director of Enterprise Risk and Insurance Management for Outerwall Inc. and is the current President of the Risk Management Society (RIMS). Julie is a graduate of Thomas More College in Northern Kentucky, began her career with a regional telecommunications company, and later served in a client consulting role with Aon Risk Services where she served as an advisor to several multi-billion-dollar revenue international clients. She joined Chiquita Brands International, Inc.'s Risk Management team in 2000 where she later led the design and launch of the company's global enterprise risk management initiative and assumed leadership of the consolidated enterprise and insurance risk management department. Julie joined Outerwall Inc. in September 2011 to lead and mature the company's Strategic / Enterprise Risk, Insurance and Safety programs. She earned her Associate in Risk Management (ARM) designation in 2002 from the Insurance Institute of America and her Certified Risk Management Professional Certification this past April. She has been an active member of the RIMS since 2000 and served on its Enterprise Risk Development Committee from 2006-2009. She was appointed to the RIMS Board of Directors in 2010 and continues to serve as an executive committee member (President) with the RIMS Board today. Julie has been board liaison for the Marketing, Communications and Publications staff, Conference Programming Committee, served as a member of the Finance Committee, as board liaison for RIMS Canada Council and ex-officio of the Spencer Foundation Board last year. She is a frequent speaker at various conferences and educational forums targeted toward enterprise risk management process design, leadership and has also presented for women's professional leadership forums.

Please suggest a question for the panel

PLEASE RETURN THIS FORM TO:

Illinois State University - Katie School of Insurance and Financial Services

Campus Box 5490 | Normal, Illinois 61790-5490

Telephone: (309) 438-3021 | Facsimile: (309) 438-7753 | E-mail: mrfirma@illinoisstate.edu

Registration (Please duplicate this form for group registration)

Please register me/our group for the 26th Annual Insurance Executive Forum.

Organization _____
Mailing address _____
City State Zip _____
Telephone Fax _____
E-mail _____

Attendees

Name 1 _____
Name 2 _____
Name 3 _____
Name 4 _____

- Individual fee** \$150 per person
- Table of 10 persons** \$1250 per table

Payment information

- Check** (payable to Katie School/Illinois State University) is enclosed.
- Credit Card** - payment by VISA, AMEX, MC or Discover credit card must be completed online at Business.illinoisstate.edu/Katie.
Please click on the "2016 Insurance Executive Forum" link on the bottom of the home page.
- This confirms my telephone registration.** Check (payable to Katie School/ Illinois State University), letter of intent, or purchase order is enclosed.

Cancellation policy

Cancellations received in writing or by telephone on or **before October 14, 2016 will receive a refund of the registration** and refunds will be processed after the seminar. After October 14, 2016, substitutions are encouraged.

Katie School Highlights

- One of the largest undergraduate programs in insurance and risk management in the U.S.
- Katie School Advisory Board of Insurance Executives
- Katie School Hall of Fame
- Katie School Innovation and Leadership Awards
- Katie School Golf Classic
- Katie School Insurance Executive Forum
- Katie School Symposium
- Katie School Executive-on-Campus Program
- Katie School Financial Regulators Program
- London Market Study Tour Program
- Spencer Educational Foundation, Inc. Risk Manager in Residence Program
- Institute for Insurance Ethics
- Edmonson-Miller Endowed Chair
- Insurance-related research and industry services
- Executive education and management development programs
- Redbird Risk Management Challenge for High School Students
- Midwest High School Scholars Actuarial Academy
- Katie School Certification in Leadership and Business Acumen Program
- Student internship program, both domestic and international including London, Bermuda, Zurich and South Africa
- Gamma Iota Sigma insurance fraternity chapter
- Student involvement in industry conferences
- Spencer Educational Foundation Scholar recipients
- Anita Benedetti Student Involvement Program participants
- Derek Hughes/NAPSLO Educational Foundation Scholarship recipients
- Association of Professional Insurance Women Scholarship recipients
- The Council of Insurance Agents and Brokers (CIAB) FAME Scholars
- Over \$100,000 awarded in scholarships annually



ILLINOIS STATE UNIVERSITY
Illinois' first public university