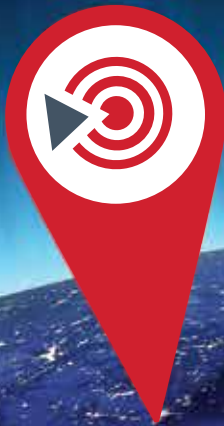


**The Program Business World
is Gathering in Scottsdale**

14th Annual TMPAA Summit

Scottsdale, Arizona • October 20-22, 2014



*Where
Program Business
Gets **DONE***

TARGET  **MARKETS**
Program Administrators Association

Where there's risk, there's complexity. It's really that simple. That's why we built an insurance company that manages risk across a broad spectrum of niche, real-world industries. From social and human services, sports and fitness to entertainment, education to the environment. At Philadelphia Insurance Companies, we handle complex risk and make it simple for you to manage. Giving your clients the freedom they need to do what they do best. Learn more. Call 855.411.0797 or visit PHL.com.



Complex Risk. Simply Handled.

A.M. Best A++ Rating
Ward's Top 50 2001-2013
97.5% Claims Satisfaction
100+ Niche Industries



PHILADELPHIA
INSURANCE COMPANIES

A Member of the Tokio Marine Group

Philadelphia Insurance Companies is the marketing name for the property casualty insurance operations of Philadelphia Consolidated Holding Corp., a member of the Tokio Marine group. All products are written by insurance company subsidiaries of Philadelphia Consolidated Holding Corp. Coverages are subject to actual policy language.

CONTENTS

Summit Mobile App	2
President’s Letter.....	3
Agenda	4
Keynote Speaker–ROBERT S. MUELLER, III.....	5
Industry Speaker–STEPHEN CATLIN	7
Workshop/Presentation Schedule/Descriptions	9
TMPAA Advisory Board and Staff.....	14
Designations.....	18
Best Practice	19
Target University.....	20
TMPAA Celebrates Its Membership.....	24
Business Operations Boot Camp	27
Target Programs	28
TMPAA Charities Report	31
Cyber Liability and E&O Coverage	32
TMPAA Thanks to Our Sponsors.....	34



14th Annual Summit Mobile App

Get meeting information on all your devices!

Download

Scan the QR code to download or search the app store for "TMPAA".




USERNAME: Your meeting registration email address

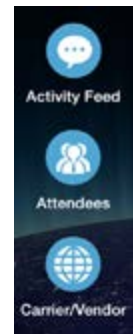
PASSWORD: 14summit

Features

The 14th Annual Summit app provides more information than ever to help you realize all our event has to offer. Find the Agenda, Attendees, Speakers, Info Booth, Sponsors and several new icons, helping you *get business done*.

Activity Feed: Find out what's happening when you open the app and see recent posts/updates from the TMPAA and other users

Carrier/Vendor: View Carrier and Vendor information at your fingertips, previously only accesible on the TMPAA website. Search for a profile or scroll down to see the full list (Vendors appear after Carriers in alphabetical order). Save specific Carriers and Vendors to "My Carrier/Ven" icon by selecting the + when viewing any profile for quick access to your personal list throughout the event. Interested in seeing a Vendor at the Trade Show? View a Vendor profile that indicates a booth # and find their table on the interactive map by selecting the pin .



My Notes: Jot down some meeting-related notes here and email them to yourself or others later!

Search: Use this tool to locate all app content in one place.

Photo Gallery: Share your Summit photos here for other members to see.

Mobile App Sponsored by: **Munich RE** 

TARGET MARKETS

Program Administrators Association

250 Philadelphia Pike, Wilmington, Delaware 19809
Phone: 877-347-5700 • Fax: 877-892-4437 • www.targetmkts.com

Dear Target Markets Conference Delegates:

This year, as we return to Scottsdale, our conference is bigger and better than ever; continuing to provide you with current market information coupled with opportunities to learn from your peer's new ideas and best practices to help you develop even more opportunities for growth and success. As we make our plans for 2015, our industry will continue to be challenged by a lumpy economy, low interest rates, and, for most lines of coverage, a stable to soft pricing environment. On the whole, Program Administrators are optimists and entrepreneurs. Uncertainty and changing conditions bring about opportunities and, I am sure as you are reading this, you each have ideas on how to take advantage of the current market conditions. Our industry—program business—continues to find ways to take advantage of new opportunities and to deliver value to our customers.

We are extremely pleased to welcome Robert S. Mueller, III as this year's keynote speaker. Mr. Mueller served as the sixth Director of the FBI from September 2001 to September 2013. He was nominated by President George W. Bush and was sworn in as Director on September 4, 2001—just one week before 9/11. His 10-year term was extended for an additional two years at the request of President Barack Obama and pursuant to legislation passed by Congress.

Mr. Mueller joined the United States Marine Corps, where he served as an officer for three years, leading a rifle platoon of the 3rd Marine Division during the Vietnam War. He is a recipient of the Bronze Star, two Navy Commendation Medals, the Purple Heart and the Vietnamese Cross of Gallantry.

Currently, he serves as Executive-in-Residence for Georgetown University, Consulting Professor at Stanford University's Law School, the Freeman Spogli Institute for International Studies and the Arthur and Frank Payne Distinguished Lecturer.

Most recently, the NFL has appointed the former FBI Director to conduct an investigation into how the league has pursued and handled the evidence in the Ray Rice domestic violence case. This is an interesting time to hear from Mr. Mueller.

This year's industry speaker is Stephen Catlin. Mr. Catlin serves as the Deputy Chairman and Chief Executive Officer of Catlin Group Ltd. Mr. Catlin founded Catlin Underwriting Agencies Limited in 1984 and was the active underwriter of Syndicate 1003 and later Syndicate 2003 until May 2003. From September 1996 to January 2002, he was the Society of Lloyd's nominated Director of Equitas Holdings Limited

Catlin Group Limited operates six underwriting hubs worldwide and operates in more than 55 offices worldwide. It owns the largest syndicate at Lloyd's of London, based on 2011 gross written premiums. With this global perspective of our industry we can look forward to an engaging exchange about our operating environment and what we can expect as we head into 2015.

The Target Markets Summit remains the premier networking event for program administrators, insurance companies, and the finest industry vendors. We're expecting more than 800 program business professionals at this meeting, including decision makers from over 50 program carriers. Be sure you take full advantage of the many networking opportunities presented here over these next few days including a number of presentations and workshops available to all attendees.

Finally, we would like to extend a sincere 'thank you' to our sponsors, whose generous support enables us to present this year's meeting and workshops: Zurich, QBE, York Programs, Wilson Elser, Munich Re, Tysers, Hudson Insurance, NetRate Systems, Meadowbrook, Berkley Program Specialists, Ironshore, TRISTAR Insurance Group, AIG Programs, ReSource Pro, BMS Intermediaries and Breckenridge Insurance Group. Without the continuous support of our meeting sponsors it would be impossible for this conference to reach its full potential and keep improving.

On behalf of the entire board and executive team, enjoy your time here in Scottsdale, and I am looking forward to seeing you all during the various events.

Cheers,



David W. Springer
President and COO, NIP Group Inc.
TMPAA President

AGENDA

Where Program Business Gets Done

Sunday, Oct 19, 1:00 p.m. **TMPAA Charities Networking Golf Tournament**—Sponsored by *Rough Notes*

Monday, Oct. 20

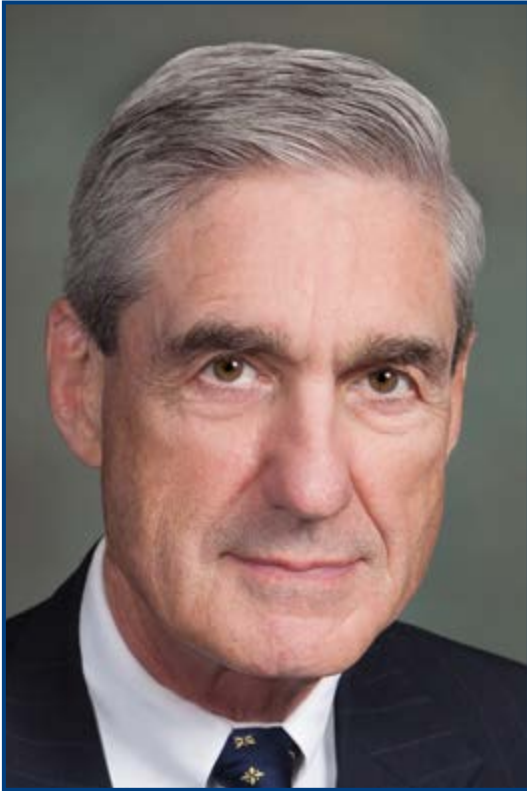
- 8:00 a.m. **Registration Table Opens**
- 8:00 a.m. **Networking Lounge Opens**—Sponsored by *Gallagher Bassett*
- 11:00 a.m. **Trade Show Opens**—Sponsored by *NetRate Systems*
- 2:30–3:30 p.m. **Workshop: Reinsurance Solutions to Improve Your Program**
- 4:00–5:00 p.m. **Results Panel—Program Business Study**—Sponsored by
Allied World Insurance Co.; Berkley Custom Insurance Managers; Chubb Group of Insurance Cos.; Ironshore; Fireman’s Fund Insurance Co.; QBE
- 5:00–6:30 p.m. **Welcome Reception**—Sponsored by *Hudson Insurance*

Tuesday, Oct. 21

- 7:00 a.m. **Networking Breakfast**—Sponsored by *Philadelphia Insurance Companies*
- 8:00 a.m. **Networking Lounge Opens**—Sponsored by *Gallagher Bassett*
- 8:00 a.m. **Trade Show Opens**—Sponsored by *NetRate Systems*
- 8:30 a.m. **GENERAL SESSION—Announcements, Best Practice Designations**
Keynote Speaker: ROBERT MUELLER, Former FBI Director
—Sponsored by *Zurich*
- 10:30 a.m.–12:00 p.m. **Carrier Meet and Greet**—Sponsored by *Travelers*
- 12:00 p.m. **Networking Lunch**—Sponsored by *Western World*
- 1:00–5:00 p.m. **Carrier Meetings**—Sponsored by *Allianz Global Corporate & Specialty*
- 5:00–6:30 p.m. **Networking Reception**—Sponsored by *QBE*

Wednesday, Oct. 22

- 7:00 a.m. **Networking Breakfast**—Sponsored by *ValueMomentum*
- 8:00 a.m. **GENERAL SESSION—Announcements, CPL Designations**
Industry Speaker: STEPHEN CATLIN, Chief Executive, Catlin Gp.
- 10:00 a.m. **Workshop: Technology Vendor Selection**
—Finding the Right Partner
- 10:00 a.m. **Workshop: M&A in the Program Segment**
—Position Your Firm for Success
- 11:00 a.m. **Workshop: A Peek Behind the Curtain**
—How Actuaries Develop Estimates
- 11:00 a.m. **Workshop: Focus on Emerging Exposures**
—Drones & Autonomous Vehicles
- 12:00 p.m. **Networking Lunch**—Sponsored by *Risk & Insurance*



14th Annual TMPAA Summit

Keynote Speaker:

ROBERT S. MUELLER, III

After completing his education, Mr. Mueller worked as a litigator in San Francisco until 1976. He then served for 12 years in the United States Attorney's Offices, first in the Northern District of California in San Francisco, where he rose to be chief of its' criminal division. In 1982, he moved to Boston as an Assistant United States Attorney where he investigated and prosecuted major financial fraud, terrorist and public corruption cases, as well as narcotics conspiracies and international money launderers.

After serving as a partner at the Boston law firm of Hill and Barlow, Mr. Mueller returned to public service. In 1989, he served in the United States Department of Justice as an assistant to Attorney General Richard L. Thornburgh. The following year he took charge of its Criminal Division. During his tenure, he oversaw prosecutions including the conviction of Panama leader Manuel Noriega, the Lockerbie Pan Am 103 bombing case and the John Gotti mobster prosecution. In 1991, he was elected Fellow of the American College of Trial Lawyers.

In 1993, Mr. Mueller became a partner at Boston's Hale and Dorr, specializing in complex white collar crime litigation. He returned to public service in 1995 as senior litigator in the Homicide Section of the District of Columbia United States Attorney's Office. In 1998, Mr. Mueller was named United States Attorney in San Francisco and held that position until 2001. He then served as Acting Deputy Attorney General of the United States Department of Justice for several months before becoming FBI Director.

Currently he serves as Executive-in-Residence for Georgetown University, Consulting Professor at Stanford University's Law School, the Freeman Spogli Institute for International Studies and the Arthur and Frank Payne Distinguished Lecturer.

Mr. Mueller and his wife, Ann, have two daughters.

Robert S. Mueller, III served as the sixth Director of the FBI from September 2001 to September 2013. He was nominated by President George W. Bush and was sworn in as Director on September 4, 2001 – just one week before 9/11.

His 10-year term was extended for an additional two years at the request of President Barack Obama and pursuant to legislation passed by Congress.

Born in New York City, Mr. Mueller grew up outside of Philadelphia. He graduated from Princeton University in 1966 and later earned a master's degree in International Relations at New York University in 1967.

After college, he joined the United States Marine Corps, where he served as an officer for three years, leading a rifle platoon of the Third Marine Division in Vietnam. He is the recipient of the Bronze Star, two Navy Commendation Medals, the Purple Heart and the Vietnamese Cross of Gallantry.

Following his military service, Mr. Mueller earned a law degree from the University of Virginia Law School in 1973 and served on the Law Review.

Sponsored by:



ZURICH®

AIG proudly sponsors the 14th Annual TMPAA Summit

To find out more about our program appetite and offerings,
please contact one of our Program Development Directors:

Mark Gardella

mark.gardella@aig.com

Cell: 775.224.5249

Jessica McWilliam

jessica.mcwilliam@aig.com

Cell: 857.654.3831



Bring on tomorrow

Insurance and services provided by member companies of American International Group, Inc.
Coverage may not be available in all jurisdictions and is subject to actual policy language.
For additional information, please visit our website at www.AIG.com.

14th Annual TMPAA Summit

Industry Speaker: **STEPHEN CATLIN**

Chief Executive and Deputy Chairman, Catlin Group Limited



Stephen Catlin began his insurance career in 1973 joining BL Evens & Others on Syndicate 264 at Lloyd's. In 1982 he became deputy underwriter, specialising in the excess of loss and energy accounts where he was supported as a market leader. He founded Catlin Underwriting Agencies Limited in 1984 and was the active underwriter of Syndicate 1003 and later Syndicate 2003 until May 2003. From September 1996 to January 2002, he was the Lloyd's nominated Director of Equitas Holdings Limited. He served as Chairman of the Lloyd's Market Association, the trade association representing the interests of

Lloyd's underwriters and underwriting agents, from May 2000 until January 2003. He was a member of the Council of Lloyd's from 2002 to 2004 and a member of the Lloyd's Franchise Board from January 2003 until December 2006. He was President of the Insurance Institute of London in 2010-2011.

He is currently a Visiting Fellow at the Oxford University Centre for Corporate Reputation.

He was selected as Ernst & Young's 'UK Entrepreneur of the Year' in October 2011.

He is also Chairman of The Sick Children's Trust, a UK charity providing accommodation for families of children who are receiving hospital treatment for serious illness.

Sponsored by:

CATLIN

Underwriting Ambition

GUIDE. GUARD. go beyond

For over 50 years Gallagher Bassett has been partnering with our clients to consistently go beyond your expectations.

We **guide** those suffering a loss to the best outcomes for their health and financial wellbeing.

We **guard** our clients' assets as the trusted stewards of their claims and risk management programs.

We **go beyond** expectations in the continuous pursuit of a better way.

Two Pierce Place • Itasca, IL 60143 • 877.254.2680
www.gallagherbassett.com



14th Annual TMPAA Summit

PRESENTATIONS/WORKSHOPS

MONDAY, OCT. 20

▶ 2:30 to 3:30 p.m. Kierland 4C

REINSURANCE SOLUTIONS TO MAXIMIZE PROGRAM GROWTH AND PROFITABILITY

DAWNMARIE BLACK—Sr. Vice Pres. Risk Solutions, BMS

ANDREW BUSTILLO—President and CEO, BMS

ROMULO BRAGA—BMS

DEAN CARBERRY—BMS

The US Reinsurance Market is proactively looking for growth in the Program Administrator sector. With insurance companies buying less traditional facultative reinsurance, more reinsurance carriers are looking for additional distribution opportunities. Attendees at this workshop will be presented with examples of how reinsurance can be used effectively with your program to accomplish the following:

- Provide excess capacity that may be limited with your current market
- Remove volatility and stabilize profit
- Analyze CAT drivers
- Pricing guidance
- Optimize capital given risk tolerance

Participate in this workshop to hear real world examples of program administrators and carriers employing reinsurance solutions to strengthen their book of business along with their working relationship. PAs will leave this workshop with an understanding of which reinsurance markets are pursuing this sector, market appetite/availability, and using reinsurance to their benefit.

▶ 4:00 to 5:00 p.m. Kierland 4A&B

PROGRAM BUSINESS STUDY—RESULTS PRESENTATIONS

Moderator:

CHRISTOPHER PESCE—President, Maritime Program Group

Dynamic fast paced presentation of three benchmarking areas explored in the 2014 State of Program Business Study.

The presentation will be moderated by one of your program administrator peers with a panel of experts to comment on each of the benchmarked topics.

- Personnel Recruitment, Training and Compensation
- Social Media Strategy
- Carrier Program Business Strategy in Next 3 Years

Executive Summary of the entire 2014 State of Program Business Study will be made available at the presentation.

WEDNESDAY, OCT. 22

▶ 10:00 to 11:00 a.m. Trailblazers A

MERGERS & ACQUISITIONS IN THE PROGRAM INDUSTRY SEGMENT: “POSITIONING YOUR FIRM FOR SUCCESS”

KEVIN DONOGHUE—Mystic Capital Advisors

Merger and acquisition activity is heating up. Whether you are considering a sale, looking to maximize the value of your firm for raising investment capital, or looking to grow through acquisition this workshop will help you identify short and long term actions that will position your company for success in the current M&A marketplace.

This workshop will address the following areas:

- State of the current M&A marketplace both in general and specifically for Program Administrators
- Factors affecting valuation: Profitability of your book matters immensely
- Deal structures: Discussion of tax implications and earn outs
- Positioning your firm to make acquisitions: Securing financing, finding deals, due diligence, and when not to do a deal

Program administrators will leave this workshop with a greater knowledge of the current marketplace, factors driving M&A in the insurance industry specifically for PAs, and an understanding of ways to maximize the value of their firm.

▶ 10:00 to 11:00 a.m. Trailblazers B

TECHNOLOGY VENDOR SELECTION—HOW TO ENSURE A SUCCESSFUL PARTNERSHIP

WAYNE UMLAND—Wayne Umland Consulting, LLC

In this interactive workshop, attendees will learn about the process of selecting the right vendor partner for their technology project. Discussion will focus on what program administrators and MGAs are looking for this year in terms of automation, what the technology focus is among your peers and what solutions are being implemented. You'll see that finding the right vendor is more than simply the product being offered. Topics covered will include:

- What you need to know about your company before beginning
- Identifying requirements - what to consider and how it's done
- The factors that result in a successful vendor partner relationship
- Approaches to vendor selection

Continued on next page...

14th Annual TMPAA Summit

PRESENTATIONS/WORKSHOPS

WEDNESDAY, OCT. 22 *Continued...*

- Key considerations in a vendor search and what helps make the process successful

Attendees will leave with a better understanding of how to identify your automation needs and objectives, what to look for in a technology provider, and how to ensure that you ultimately select a vendor that can become a true partner, rather than simply a solution provider, working with you to ensure mutual success.

▶ 11:00 a.m. to 12:00 p.m. Trailblazers B

ACTUARIAL ADVENTURE— A PEEK BEHIND THE CURTAIN AT HOW ACTUARIES DEVELOP THEIR ESTIMATES

JOEL CHANSKY—Milliman

Have you ever wondered how the carrier decides what your rate change should be? This session will provide a high level overview of how actuaries project indicated loss ratios and rate changes for the upcoming year. The discussion will include an explanation of how Incurred but not Reported (“IBNR”) reserves are calculated and why ignoring IBNR reserves can create tension and misunderstandings between program administrators and carriers. The presentation will summarize the challenges, pitfalls, and uncertainties involved in actuarial work, focusing on common situations that can lead the carrier’s actuary to overstate the amount of rate change really needed. Attendees can expect to hear a case study including items to consider regarding your book of business when having discussions with carriers.

Key takeaways will include potential ideas for bridging the gap between the carrier’s actuarial indications and the program administrator’s expectations. A goal of the session is to provide program administrators with a better understanding of actuarial reports to aid you in discussions with carriers. And if all else fails, we’ll tell some actuarial jokes!

▶ 11:00 a.m. to 12:00 p.m. Trailblazers A

FOCUS ON EMERGING EXPOSURES— DRONES & AUTONOMOUS VEHICLES

ART SEIFERT—President, Glatfelter Program Managers
JOHN WILLEMSSEN—VP, Specialty Markets, Munich Re

Take a closer look at two fascinating technologies predicted to significantly impact society and, in turn, insureds and insurers in the coming years.

Commercialization of drones is predicted to soar by 2020. Agriculture and public safety are among the most promising commercial and civil markets for drones. Potential applications reach across business and public safety sectors including disaster management, construction, environmental monitoring and freight transport—to name just a few. Autonomous vehicles will be more than just a new way to get around town. The technology stands to completely change the way we live and manage our daily lives. Understanding the impact this technological change may have on our social, political, and economic future will be key in our professional and personal lives in the not too distant future.

WORKSHOP PRESENTERS

Biographies Listed by Name, Company

INDIVIDUAL	COMPANY	PAGE	INDIVIDUAL	COMPANY	PAGE
Black, Dawnmarie	BMS	9	Donoghue, Kevin	Mystic Capital Advisors	9
Bustillo, Andrew	BMS	9	Pesce, Christopher	Maritime Program Group	10
Braga, Romulo	BMS	9	Seifert, Art	Glatfelter Program Managers	10
Carberry, Dean	BMS	9	Umland, Wayne	Wayne Umland Consulting, LLC	10
Chansky, Joel	Milliman	9	Willemsen, John	Munich Re	10



Dawnmarie Black—*Sr. Vice President Risk Solutions, BMS*

Dawnmarie comes to BMS from Ascot Underwriting Inc. and is a seasoned (over 23 years) accomplished leader/producer with extensive broking and underwriting experience. During her time at Ascot, she significantly increased the syndicate's footprint in the US facultative market and the MGA sector. Prior to her senior role

at Ascot Underwriting, Dawnmarie was an Executive Director at Aon Benfield Fac based in Boston.



Andrew Bustillo—*President and CEO, BMS*

As President and Chief Executive Officer of BMS Intermediaries, Andrew leads the development of U.S. business. He is a member of the Group Executive Committee and the Board of BMS Inc. Andrew is a proven executive in the reinsurance industry, with nearly 30 years of experience. Prior to joining BMS, Andrew ran RedBank Re, which he founded in 2009,

providing advisory and reinsurance services to a range of clients. Prior to forming RedBank Re, Andrew was Executive Vice President and a member of the Executive Committee for Benfield Inc.'s U.S. operations. Before that, he held senior leadership roles at Guy Carpenter and EW Blanch. His career began in the underwriting community in 1985, with positions at M&G Re and Constitution Reinsurance Corporation, before he joined Aon Re and transitioned to the intermediary business in 1990. Andrew holds an MBA in Finance & International Business from NYU Stern School of Business, and graduated from Middlebury College with a BA in Economics and Spanish.



Romulo Braga—*BMS*

Romulo Braga directs BMS Capital Advisory's strategic goal of delivering the most effectively-priced capital and integrated solutions to clients and prospects.

Mr. Braga joined BMS Group from Aon Benfield, where he specialized in providing (re)insurance-focused capital markets and corporate finance advice. He has tangible experience servicing retained

clients in the US and London, originating new opportunities, executing M&A mandates, and advising start-up insurance ventures. Prior to Aon Benfield, Romulo was a reinsurance broker at Benfield, Inc where he promoted the company's ability to create and service the best suitable reinsurance program to assigned clients and prospects.

Mr. Braga earned Bachelor of Arts degrees in International Politics & Economics and Spanish from Middlebury College. He holds securities licenses including the Series 24, Series 28, Series 7, and Series 63, and the designation of Associate in Reinsurance from the Insurance Institute of America.



Dean Carberry—*BMS*

Dean has 20 years of experience in the industry of property and casualty insurance—Fester 1991 to 1995, Cooper Gay & Company 1995 to 2000, Rattner Mackenzie from 2000 to 2009 and since then with BMS Bermuda.

Areas of casualty expertise include lines such as D&O, E&O, Auto, Construction GL and Medmal either through reinsurance or as program insurance in some cases using associations, captives, risk retention groups, risk purchasing groups. Property expertise in providing capacity for local reinsurance market in Bermuda from retrocessionnaires or funds looking to participate in the Bermuda property cat market through quota share reinsurance participations.



Joel Chansky—*Consulting Actuary, Milliman*

Joel is a principal with the Boston office of Milliman. He joined the firm in 1987. Joel's property and casualty insurance experience includes loss reserving, premium reserving, valuation studies, funding studies for captives and self-insureds, rate filing reviews for regulatory authorities, and expert testimony.

Joel specializes in alternative market issues. In addition to the alternative market, clients have included traditional property and casualty insurers, reinsurers, insurance departments, attorneys general, trade associations, municipal bond insurers, catastrophe bond special purpose vehicles, underground storage tank insurers, Lloyd's of London, and syndicates on the New York Insurance Exchange.

A frequent speaker on the topics of captives, risk-retention groups, and alternative risk financing, Joel was also rated among the top 50 most influential people in the Captive Insurance Industry as ranked by Captive Review Magazine in 2012. Joel has a BE in Mathematics from Dartmouth Collage.



Kevin Donoghue—*Managing Director Mystic Capital Advisors*

Kevin has spent over 20 years in various merger, acquisition and financial consulting roles. Kevin is President, CEO, and a registered representative of Mystic Capital Markets Group, LLC as a General Securities Principal (Series 24), Corporate Securities Limited Rep. (Series 62), General Securities Rep. (Series 63), and a Limited Rep.—Investment Banking (Series 79).

Prior to co-founding Mystic Capital, Kevin started and developed BMG Capital Advisors Group (a subsidiary of The Hartford), and four years with KPMG Peat Marwick.

He has a MBA from Boston College and a B.S. in Accountancy from Bentley College. Kevin has earned the Chartered Financial Analyst (CFA) and Certified Insurance Counselor (CIC) designations and is a Certified Public Accountant (CPA).

He is a member of the following: New York Society of Security Analysts (NYSSA), CFA Institute, American Institute of Certified Public Accountants (AICPA), Society of Certified Insurance Counselors (SCIC) and the National Center for Employee Ownership (NCEO).



Christopher Pesce—
Maritime Program Group

Prior to forming Maritime Program Group, Chris worked extensively for Maritime General Agency, starting as an intern while completing his bachelor degree at Saint Joseph's College in NY. He took over as Maritime General Agency's General Manager in 1997 and moved the operations to the current headquarters in Connecticut.

In 2009, Chris managed the strategic acquisition of Marine MGA based in Manchester, NH, and in 2010 turned his focus to rebranding the companies and programs under the new name of Maritime Program Group.

Chris is an active member of the insurance community. He currently serves on the Producer Council for the American Institute of Marine Underwriters and teaches continuing education classes about Marine Insurance throughout the country. In the past, he served on the Executive Committee for the Independent Insurance Agents Association of CT and was Chairman of the Young Agents Committee. Chris is a lifelong boater, and hails from the south shore of Long Island, NY. He and his family currently reside in Madison, CT.



Art Seifert—Glatfelter Program Managers

Art Seifert has been in the insurance industry for more than 30 years, starting as an underwriter with the Reliance Insurance Company in 1979. He has also served as the Vice President for a retail insurance agency and built a specialty insurance consulting practice in 1989, Professional Insurance Purchase. In 1994, he founded and was President and CEO of Lighthouse

Underwriters, which he subsequently sold in 2006 to US Risk based in Dallas, Texas. Following the sale, he moved to Dallas and spent four years as President of US Risk Underwriters and CUO of US Risk Group. Art moved to Bunker Hill Underwriters Agency in 2009 to be CEO. Currently, Art is President of Glatfelter Program Managers in York, PA.

A graduate of Colgate University with a concentration in Philosophy, Art has earned the CPCU, CIC and RPLU designations. Art has been published in *Rough Notes*, *Agent and Brokers*, *National Underwriter*, *Assisted Living Today*, *Inventor's Digest*, *The Washington Journal* and other publications. He is a current Director of the Target Markets Program Administrators Association and has also served as its President.



Wayne Umland—
Wayne Umland Consulting, LLC

Wayne is founder and principal of Wayne Umland Consulting, a company he formed after retiring after 17 years as Executive Vice President & CIO from Glatfelter Insurance Group at the end of 2013. Glatfelter is one of the twenty largest privately held brokers in the country. He was responsible for enterprise-wide technology and infrastructure, applications, telecommunications, internet/social media and corporate strategy. He worked directly with business partners and independent brokers and agents in order to drive efficiencies implemented at Glatfelter to their businesses and companies.

Since January, Umland has been engaged by SMA and published a research study regarding MGAs/Program Managers and their technology needs and appetite. He is currently engaged by Agile Technologies to do a vendor selection project for a small property and casualty insurer in the mid-west and engaged by Island Insurance in Hawaii to develop project management expertise in their IT staff, and help them understand how to develop and implement projects as they undertake a policy administration system for twenty lines of business.



John Willemsen—VP
Specialty Markets, Munich Re

John Willemsen is a VP of Primary Insurance Programs in the Specialty Markets division of Munich Reinsurance America, Inc. ("Munich Re"). Munich Re's Specialty Markets division is a recognized leader in the Alternative Market and Insurance Program segments, delivering customized risk transfer, risk sharing, and risk management solutions.

In his present position, he produces, underwrites and manages primary insurance programs in the Program Administrator and MGA niche. John has an depth knowledge of insurance program distribution channels and technical expertise to develop profitable and durable client relationships. He manages account teams throughout the entire program development cycle including qualification, actuarial, underwriting, policy administration, regulatory, claims, and complex program structures.

Prior to joining Munich Re in 2005, John was the principal of Advantage Risk Management Services, Inc. which provided public entity insurance on a primary, excess and reinsurance basis. He also held various management positions at Selective Insurance Co. of America, Metropolitan Life Insurance and Selected Risks Insurance.

John is an alumni of Upsala College.

Some programs are so unique most insurers won't even take the call.



Fortunately, Ironshore Programs love a challenge.

We work, so you work. Ironshore is structured so our Program Administrator partners have direct access to our senior executives. Leaders who average 30 years of experience. Our entrepreneurial model gives our top people the freedom to respond with innovative solutions, which is why Ironshore Programs has developed a reputation for insuring complex programs most companies won't even consider. No matter how distinct your exposure, our response will be equally remarkable. **For more information please call 1-877-IRON411 or go to ironshore.com.**



The information contained herein is for general informational purposes only and does not constitute an offer to sell or a solicitation of an offer to buy any product or service. Bound insurance policies, not summaries thereof, govern. Not available in all states.

TMPAA 2014 ADVISORY BOARD

BOARD EXECUTIVE COMMITTEE



- (l to r):
- **DAVID SPRINGER**, *TMPAA President, NIP Group*, www.nipgroup.com, Ph: 800-446-7647
 - **JEREMY HITZIG**, *Distinguished Programs*, www.distinguished.com, Ph: 212-297-3109
 - **ART SEIFERT**, *Glatfelter Insurance Group*, www.glatfelters.com, Ph: 717-741-0911 Ext 7472
 - **HEIDI STROMMEN**, *ProHost USA, Inc.*, www.prohostusa.com, Ph: 952-924-6973

TMPAA BOARD MEMBERS



- (top row, l to r):
- **TONY CAMPISI**, *Glatfelter Insurance Gp.*, www.glatfelteragency.com, Ph: 717-741-0911
 - **DAVID HAMPSON**, *Willis of New Hampshire, Inc.*, www.willisprograms.com, Ph: 603-334-3032
 - **JINO MASONE**, *Zurich*, www.zurichna.com, Ph: 410-544-4860
 - **MARK J. KISSICK**, *York Programs*, www.yorkrsg.com, Ph: 781-917-1767
 - **TOM WILSON**, *Wilson Elser*, www.wilsonelser.com, Ph: 212-915-5145
 - **KAREN TRUDEL**, *GMI*, www.gmi-insurance.com, Ph: 610-933-4679
- (bottom, l to r):
- **BILL MECKLENBURG**, *The Redwoods Group*, www.redwoodsgroup.com, Ph: 919-462-1295
 - **JOHN WILLEMSSEN**, *Munich Re*, www.munichreamerica.com, Ph: 609-243-5534
 - **DUSTY ROWLAND**, *Fulcrum Insurance Programs*, www.fulcrumprograms.com, Ph: 425-453-5157
 - **RAY SCOTTO**, *TMPAA Exec. Dir.*, www.targetmarkets.com, Ph: 302-268-1010
 - **TRACEY CARRAGHER**, *Breckenridge Insurance Group*, www.breckis.com, Ph: 678-322-3535
 - **CHRIS PESCE**, *Maritime Program Group*, www.maritimepg.com, Ph: 860-399-3656
 - **LINDA BOBORODEA**, *Business Risk Partners*, www.businessriskpartners.com, Ph: 860-903-0004

EMERITUS BOARD MEMBERS



- (l) • **GLENN CLARK**, *Rockwood Programs Inc.*, www.rockwoodinsurance.com, Ph: 302-765-6001
- (r) • **GREG THOMPSON**, *Markel Specialty*, www.markelinsurance.com, Ph: 678-290-2109

TMPAA STAFF MEMBERS



RAY SCOTTO, *Executive Director, Target Markets*

Ray Scotto has been involved with Target Markets since attending the first Summit in October 2001. He was hired as the Executive Director of the Association in January 2002. Ray was instrumental in the development and implementation of several Association initiatives including the commercial website, Target Programs, the Program Administrator Best Practice Designation, Target University, and TMPAA Charities.

Ray's management experience was gained in the public sector, serving as the administrator of a child abuse investigation unit in SE Pennsylvania for 22 years. He has also worked as an adjunct professor at West Chester University, PA.

Ray holds a Masters Degree in Social Work.

SUSANNE BRACONNIER

Association Services Coordinator, Target Markets

Prior to joining Target Markets, Susanne worked as an underwriting assistant for the EPLI department of Rockwood Programs. Previous industry experience includes State Farm Insurance Fire and Auto Claims, Marine Midland Bank Commercial Finance Division and AIG's Payroll Marketing Department. Susanne has been the Association Coordinator for Target Markets since January of 2002.



MONICA ELISCHER

TMPAA Membership Coordinator, Target Markets

Prior to becoming a member of the Target Markets team, Monica worked the health and life arena through Aflac, and provided internet sales marketing at ByTheZip.com. She has held multiple positions in administration/sales throughout her career. Monica is currently responsible for enhancing the Association's Program Administrator membership base. She holds a bachelor degree in Marketing/Public Relations from Syracuse University.

SARAH AYARS

Marketing Coordinator, Target Programs

Sarah Ayars is responsible for carrying out Target Programs initiatives including electronic marketing, Outlet Center design, website demonstrations and member support. Sarah joined the Target Markets staff in June 2010. Previously, she was Communications Coordinator for Performance Marketing where she implemented marketing strategies for clients in a wide range of industries. She has a bachelor's degree in Advertising/Public Relations from The Pennsylvania State University.



REG PIERCE, *Director, Target Program Marketing Services (TPMS)*

Reg has been involved with TMPAA since October 2010. He is responsible for managing and creating sponsorship opportunities for TMPAA members and also heads up TPMS. Reg holds a BA in History from Williams College. Reg served four years as an Officer in the U.S. Navy including a six month tour as a crewmember on COURAGEOUS in the 1974 successful defense of the America's Cup.

Reg started his career as an advertising executive in NYC. In 1993, he began his 20+ year run focused on specialty insurance marketing as SVP at MRM, managing director at In-Market Partners and brand strategist at Bailey Brand Consulting in PA. In 2011, he initiated the Association's Program Marketing Campaign Award.

PAST | PRESENT | FUTURE

Commitments That Last.

- As a recognized leader in the specialty/niche marketplace, we value your expertise and together strive to be the best.
- We value relationships and work together to meet short and long-term goals.
- We are able to anticipate market trends/changes and respond quickly to agent and insured needs.
- Our six carriers comprise admitted and E&S capabilities in all fifty states, ensuring multiple ways for you to succeed while expanding and diversifying your agency.

Specialty Property & Casualty Programs and Products.

(800) 482-2726 | PROGRAMS@MEADOWBROOK.COM



www.meadowbrook.com



Changing winds



Smooth sailing



Shifting currents

You can't direct the wind, but you can adjust the sails

Complex times require a forward-thinking approach based on sound knowledge and experience. Our superior financial strength, broad capabilities and extensive resources enable us to craft programs that leverage your strengths and underwriting expertise. The result is a long-term program relationship equipped to navigate dynamic market forces with confidence.

Munich Re America Specialty Markets—program expertise that keeps you moving forward under any conditions.

Contact John Willemsen at (609) 243-5534 or jwillemsen@munichreamerica.com
Learn more at www.munichreamerica.com/insuranceprogram

NOT IF, BUT HOW



Products and services provided by Munich Reinsurance America, Inc. Princeton, New Jersey

Designations



Best Practice Designation

One core element of the TMPAA mission is to promote excellence for this most elite segment of insurance intermediaries, Program Administrators/MGAs. Target Markets has developed a uniform protocol and criteria to evaluate Agency Member program business operations. Participation in a Best Practice evaluation will encourage applicants to review their current level of functionality, seek greater efficiencies in the way they currently conduct business. Ultimately, successful Best Practice candidates will be recognized by program business professionals as a "best in class" operation.

The TMPAA Best Practice Designation will not only benefit members through critical reviews and improvements in agency functionality but also enhanced market image, product promotion and recognition from their peers.



CPL (Certified Programs Leader) Designation

The mission of Target University is to further promote Best Practices in program administration, enhance the status of Program Business in the insurance industry and recognize the specialized skill sets of Program Specialists. The University was developed through the efforts of the TMPAA Board and committee of TMPAA members who served as advisors on course development. Courses are taught by your program peers and professionals actively working in this industry segment.

TMPAA Members who complete and pass all 12 courses and have the prerequisite leadership history in program business are eligible to apply for the CPL (Certified Programs Leader) Designation. Approved applicants will be awarded the CPL Designation at either the Mid Year or Summit annual meetings.

TARGET
MARKETS 

Best Practice Designation

TMPAA Best Practice Agencies
Hall of Fame



FOCUSED ■ RESPONSIVE ■ EXPERIENCED



Target Markets Awards 5 Certified Programs Leader (CPL) Designations

CPL Designation recipients at the 2014 Mid Year Meeting included Michael Greville, QBE Insurance Company; Patrick T. Heese, Zurich; Glenn Montgomery, Brownstone Insurance; Craig Moore, B&B Programs; and Gina Galloway Wood, Great American Insurance Company.

Recipients of the Designation completed and passed 12 required Target University courses and met program and industry experience expectations set out by the Association.

- 5 years total insurance experience
- 2 years experience in a Program Leadership Role (Manager, Supervisor, Officer) OR 5 years as a Program Underwriter OR 5 years as a Vendor in a technical position directly serving the program business industry
- Absence of any ethical violations

Main Sponsor



Course Sponsors



A Tradition of Service, Founded on Trust.








do what counts.





XL Group Insurance




Target University Supporters

- AIG Programs
- Breckenridge
- Tysers
- Munich Re



Pictured (l. to r.): Glenn Montgomery, Laura Zollner (2013 Summit CPL recipient), and Gina Galloway Wood

CPL Recipients 2012-2014

Debra Anglin	Jeffrey Gauthier	Dan Rieden
Domenic Antinucci	Michael Greville	Julie Roberts
Eric Arthur	Patrick T. Heese	Dan Schoenfeld
Kim Ayala	Brian Kenny	John Solari
Michael Bachman	Brianna Leakan	Katie Stephens
David Beighley	Faye Leto	Heidi Strommen
Adam Besnard	Erin McBride	Lisa Tancioco
Sim Bridges	Carolyn Miller	Michael Thabet
Tina Brizuela	Glenn Montgomery	Penelope Thomas
Jeremy Bryant	Craig Moore	Greg Thompson
Chuck Bushong	Frank Noyes	William Thompson
Bonnie Coverstone	Jim O'Connell	Alek Turko
Susan DeCarlo	Jeremiah O'Donovan	Gina Galloway Wood
Christopher Fell	Michael Oliver	Steve Zastrow
James Flynn	Brian Parks	Laura Zollner
Deborah Francis	Joe Peloso	

University is produced in partnership with

insure|learn

Driving losses down for Program Administrators

BE OPTIMYSTIC!SM



SPECIALISTS IN:

**MERGERS & ACQUISITIONS, PERPETUATION PLANNING,
BUSINESS VALUATIONS, AND STRATEGIC CONSULTING TO
THE RETAIL AND WHOLESALE INSURANCE INDUSTRY**



MYSTIC CAPITAL ADVISORS GROUP, LLC

FOR MORE INFO

Kevin P. Donoghue, Managing Director

165 Madison Avenue • Suite 401 New York, NY 10016 • 212.251.0972

www.mysticcapital.com

NEW YORK • CHARLOTTE • DALLAS



Insurance
Rating

Solution

Business Strategy

Delivering ISO Based Commercial Lines

Rating & Policy Issuance Solutions to MGAs, Program Administrators & Insurance Carriers

NetRate

Accurate
Flexible
Cost effective
Rapidly configured
Quickly customized

Commercial Lines Rating and Policy Issuance Systems

Quick, Flexible Product Configuration

Fast, Accurate Customization

Worksheet and Quote Document Generation

Time Saving Interfaces and Utilities

3rd Party Integration

Policy Life Cycle Transaction Rating

ISO Content Is Continuously Maintained

ISO and NCCI Business Partners

NetRate Systems Turn-Key Rating & Policy Issuance Solutions

For More Information, Contact NetRate at (517) 347-4900

www.NetRate.com





OneBeacon Program Group—a member of OneBeacon Insurance Group, a leading specialty insurance carrier whose dedicated program focus aligns *specialists with specialists*. Our goal is to provide a rewarding and complementary partnership through innovative insurance solutions and unparalleled service... all backed by OneBeacon's financial strength.

onebeaconprogramgroup.com

For more information contact:

Dan Beaudette
President, OneBeacon Program Group
303.408.7322 | dbeaudette@onebeacon.com



A Member of OneBeacon Insurance Group

These policies will be underwritten by Atlantic Specialty Insurance Company whose principal executive offices are located at 601 Carlson Parkway, Minnetonka, MN 55305.

CHARTER MEMBERS

ABACUS INSURANCE BROKERS
AIG PROGRAMS
AMWINS PROGRAM UNDERWRITERS
ARROW INSURANCE SERVICE, INC.
ASCINSURE SPECIALTY RISK, LLC
CLARION ASSOCIATES, INC.
GMI INSURANCE
INTERCORP, INC.
LANDSCAPE CONTRACTORS
INSURANCE SERVICES, INC.
MARKEL PROGRAMS
MEADOWBROOK INSURANCE GROUP
MYSTIC CAPITAL ADVISORS

NSM INSURANCE GROUP
PRO TRANS
PROHOST USA
ROCKWOOD PROGRAMS, INC.
SECURITY FIRST INSURANCE GROUP
SPORTS & FITNESS INSURANCE CORP
THE SULLIVAN GROUP
TRAVELERS
US RISK
WILSON ELSER
WOODUS K. HUMPHREY & COMPANY
XL PROGRAMS

MEMBERS CELEBRATING 10 YEARS (PLUS)

5 STAR SPECIALTY PROGRAMS
ACE COMMERCIAL RISK
ALLIANT SPECIALTY INSURANCE
SERVICES, INC.
ARA INSURANCE SERVICES, INC.
ARCH INSURANCE
ARROWHEAD GENERAL INSURANCE
AGENCY
AUTOMOTIVE RISK MANAGEMENT (ARM)
B & B PROGRAMS
BERKLEY PROGRAM SPECIALISTS
COSTANZA INSURANCE AGENCY
COUNTERPOINT SOFTWARE
DISTINGUISHED PROGAMS GROUP
DMI INSURANCE
FIREMAN'S FUND INSURANCE COMPANY
GREAT AMERICAN INSURANCE GROUP
HARTAN BROKERAGE, INC.

HCC SPECIALTY INSURANCE
HERBERT H. LANDY INSURANCE
HUDSON INSURANCE COMPANY
INTEC
MILLIMAN, INC.
MUNICH RE
NATIONAL SPECIALTY UNDERWRITERS
PAK PROGAMS
REPUBLIC GROUP
RESOURCE PRO
TANGRAM PROGRAM MANAGERS & INS.
SERVICES
TENNANT SPECIAL RISK, LLC
VENTURE INSURANCE PROGRAMS
VRC INSURANCE SYSTEMS
WESTERN LITIGATION, INC.
YORK PROGRAMS
ZURICH NORTH AMERICA

MEMBERS CELEBRATING 5 YEARS (PLUS)

ALL RISKS, LTD.
ALLIED WORLD INSURANCE CO.
AMERICAN CLAIMS MANAGEMENT
AMERICAN LUMBER UNDERWRITERS
AMERICAN SOUTHERN INS. CO.
AMRISC, LP
AMTRUST UNDERWRITERS, INC.
AMWINS GROUP/SPECIALTY PROGRAMS
APPALACHIAN UNDERWRITERS, INC.
ARGO GROUP
ARTHUR J. GALLAGHER RISK MANAGEMENT SERVICES
AXIS US INSURANCE
B&B PROTECTOR PLANS, INC.
BB&T INSURANCE SERVICES
BEAZLEY GROUP
BELLINGHAM UNDERWRITERS, INC.
BERKLEY NET UNDERWRITERS
BILL IT NOW
BROWNSTONE INSURANCE
BROWNYARD GROUP
BUSCHBACH INSURANCE AGENCY
BUSINESS RISK PARTNERS
CATLIN
CHARITY FIRST INSURANCE SERVICES
CHELSEA RHONE, LLC
CITA INSURANCE SERVICES
CORELOGIC/RISKMETER ONLINE
COST FINANCIAL GROUP
DUAL COMMERCIAL, LLC
EDGEWOOD PARTNERS INS. CENTER
ENGLE MARTIN & ASSOCIATES, INC.
EPG INSURANCE
EPIC-PREMIER INS. SOLUTIONS
EVEREST NATIONAL INSURANCE
EVERGUARD INSURANCE SVCS, INC.
FIRST PIONEER INSURANCE AGENCY, INC.
FULCRUM INSURANCE PROGRAMS
GALLAGHER BASSETT SERVICES, INC.

GLATFELTER INSURANCE GROUP
THE HARTFORD
HISCOX
I-ENGINEERING, INC.
IMA FINANCIAL GROUP
IMPERIAL PFS
INNOVATIVE COVERAGE CONCEPTS
INSURE LEARN
INTELLECTUAL PROPERTY INSURANCE SERVICES
INTERNATIONAL EXCESS PROGRAM MANAGERS
IRONSHORE, INC.
JOSEPH CHIARELLO & COMPANY, INC.
K&B UNDERWRITERS
KF&B, INC.
LANCER MANAGEMENT COMPANY
LIBERTY INTERNATIONAL UNDERWRITERS
LIBERTY MUTUAL PROGRAMS
LOCKTON AFFINITY
MACKINAW ADMINISTRATORS, LLC
MARITIME GENERAL AGENCY
MARSH SPONSORED PROGRAMS
MAXUM SPECIALTY INSURANCE GROUP
MCGOWAN EXCESS & CASUALTY
MCKEE RISK MANAGEMENT, INC.
MINICO, INC.
NAS INSURANCE SERVICES
NETRATE SYSTEMS, INC.
NEW EMPIRE GROUP
NIF GROUP, INC.
NIP GROUP
NORMAN-SPENCER AGENCY
NORTH AMERICAN RISK SERVICES, INC.
O'DONOVAN & ASSOCIATES, INC.
ON POINT UNDERWRITING
ORYX INSURANCE BROKERAGE, INC.
PARADIGM MANAGEMENT SERVICES
PATRIOT UNDERWRITERS, INC.
PATRIOT UNDERWRITING MANAGERS
PREFERRED CONCEPTS, LLC

PREFERRED PROPERTY PROGRAM
PROFESSIONAL GOVERNMENTAL UNDERWRITERS
PROFESSIONAL PROGRAM INSURANCE BROKERAGE
PROGRAM BROKERAGE CORP.
PROTECTION ADVANTAGE, INC.
PROVIDENT AGENCY, INC.
QBE FIRST
QBE
QUAKER SPECIAL RISK
QUIRK AND COMPANY
RISC, INC.
RISCO, INC.
SAFEHOLD SPECIAL RISK
SCJ INSURANCE SERVICES
SIAA PROGRAM DIVISION
ST. JAMES INSURANCE GROUP
STRATEGIC INSURANCE UNDERWRITERS
SWETT & CRAWFORD GROUP
SYNERGY PROFESSIONAL ASSOCIATES
TARGET INSURANCE SERVICES
THE MCLAUGHLIN COMPANY
THE MECHANIC GROUP, INC.
THE REDWOODS GROUP
TOTAL PROGRAM MANAGEMENT
TRIAD INSURANCE MANAGEMENT & SERVICES AGENCY
TRINITY UNDERWRITING MANAGERS, INC.
TRISTAR INSURANCE GROUP
VERACITY INSURANCE SOLUTIONS
VGM INSURANCE
VICTOR O. SCHINNERER & Co., INC.
VIRTUAL MGA LTD, CO.
W. H. GREENE & ASSOCIATES, INC.
W.F. CLAYTON & ASSOC. LLC
WESTERN HERITAGE INSURANCE CO.
WESTERN WORLD INSURANCE GROUP
WILLIAMS & STAZZONE INSURANCE AGENCY
WILLIS OF NEW HAMPSHIRE, INC.

Made possible by



QBE is a proud sponsor of Target Markets

QBE Program Business knows that underwriting specialization and tailored program strategies create strong partnerships. Our diversified product offerings, 50-state capability and broad appetite for risk make it possible for us to provide a best-in-class platform for small- to mid-sized commercial customers with unique needs.

Our lines of business

- Automobile Liability
- General Liability
- Professional Liability
- Property
- Workers' Compensation

For more information on QBE Program Business, contact:

Catherine Torrey

catherine.torrey@us.qbe.com

TMPAA Program Business Operations Boot Camp

March 12-13, 2015 • Hyatt French Quarter Hotel • New Orleans

The TMPAA in partnership with the Operations Advisory Service of TMPAA member ReSource Pro will be offering a program administration focused two day workshop designed to assist insurance operations leaders facilitate growth and profitability. This hands-on workshop will focus on best practices to enhance skill sets around leading teams, change management, process efficiency and improvement. These are skill sets and practical tools that can be brought back to your office and implemented immediately.

Target Audience

This training targets the operational managers at program administrator agencies.

Areas of Training

- Identifying skill sets that will help you succeed and grow
- Identifying operational gaps in your organization
- Increasing organizational effectiveness to meet your targets
- Improving your organization's ability to manage the process of change
- Applying lean process improvement and problem-solving techniques
- Fostering a culture of continuous process improvement

Training Organization

The inspiration for the Program Operations Boot Camp comes from a similar training seminar run by TMPAA member ReSource Pro. The Association requested that a similar program be developed focusing on program operations and made available for TMPAA members. Training will be conducted by ReSource Pro and other experts brought in to focus on the specific areas of expertise required for this targeted audience.

Learn more about this important investment for your agency.

ReSource Pro will be providing Program Business Boot Camp information from 1:00 to 3:00 PM on Tuesday, October 21 in the Pathfinders A Conference room of the Westin Kierland Hotel.

Come learn how small improvements in your agency operations can add thousands to your bottom line.



Advertise your Programs to Retail Agents Nationwide

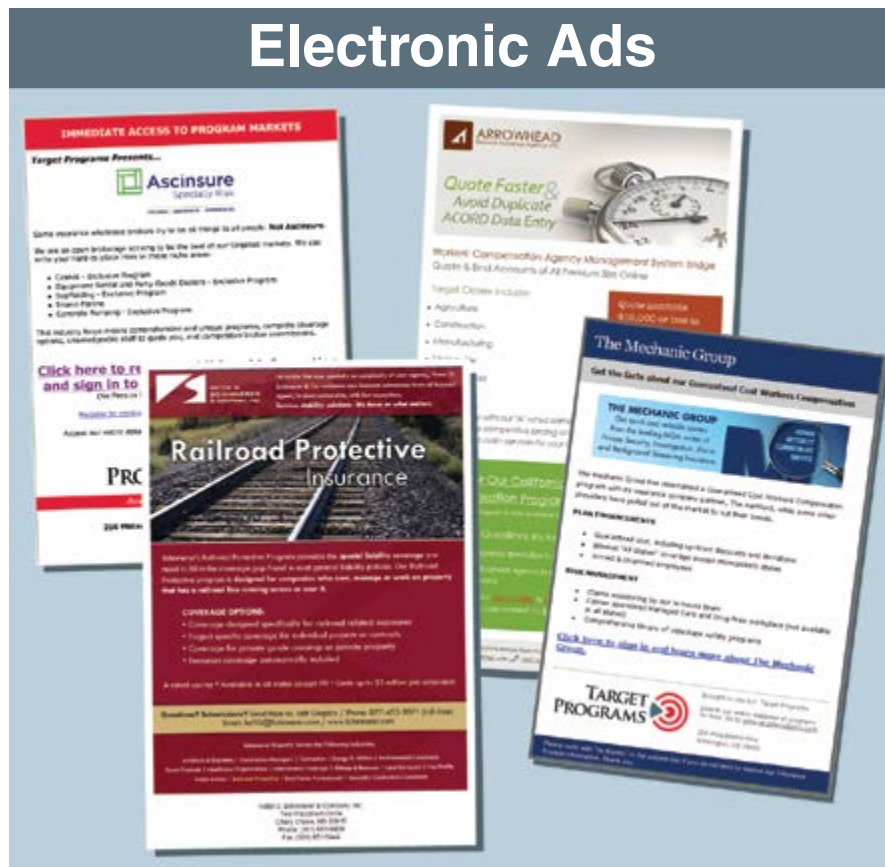


WHAT IS TARGET PROGRAMS?

Target Programs is an exclusive member resource that provides the important connection between independent retail agents and program administrators. It brings efficiency to the process of locating coverage and finding producers in the program insurance marketplace.

WHY YOU SHOULD ENROLL?

- Enhance your web presence with an individually branded Outlet Center on TargetPrograms.com
- Generate a marketing database of agents, collected with each visit to your Outlet Center
- Distribute product announcement emails to our large database of independent P&C agents
- Receive instant lead notifications when risks are posted on the Coverage Exchange, allowing you to pursue possible new business
- Purchase additional custom email packages, exclusive to Target Programs participants
- **INCREASE NEW BUSINESS OPPORTUNITIES**



For more information about participation in Target Programs, contact Sarah Ayars at (302) 268-1011 or sarah.ayars@targetmkts.com.

More than advertising, we build connections.

- ▶ **Reload your brand**—ask about our Brand Refresh Program.
- ▶ **Get a fresh perspective**—from a team with industry know-how.
- ▶ **Make things happen**—for your specialty programs.



Reg Pierce, TPMS Director
267 257-3757 (cell)
302 268-1009 (office)
reg.pierce@targetmkt.com

**TARGET
PROGRAMS** 
Marketing Services

when you think process, do you see profit?



We do. With a focus on insurance and expertise in over 1000 back office tasks, we're able to deliver powerful processes with extraordinary efficiency. Let us handle your processing, while you work on all the possibilities.



ReSourcePro
do what counts.

1-888-577-7552



REQUEST FOR FUNDING PROPOSALS

You have a voice in the organizations our funds support. The TMPAA Charities Board is accepting funding applications submitted by TMPAA members to choose our beneficiaries. Funding requests must fall into the areas of education and business incubation. Please contact the Association to request the proposal document and support a charity in your community. Grants will be awarded at the end of each year.

Recent Individual TMPAA Charities Contributors

Adam Weber/Irving Weber
Andrew Biggio/First Indemnity
Andy Cooper/Ballator Insurance
Ben Francavilla/AmWINS
Bijan Abdi/Freedom National Insurance Svcs
Bill Eck/EPG Insurance
Bill Mecklenberg/Redwoods Managers
Bob Burke/Affordable Home Services, Inc.
Calvin Sullivan/CM&F
Chris Foy/Total Program Management
Dale Hendrix/EPG Insurance
Dan Schoenfeld/Clarion
Dusty Rowland/Fulcrum Programs
Ellen Dividock/The Wright Insurance Group
Gregg Morgan/EPG Insurance
Ira Dower/Synergy Professional Associates
Jack Bailey/The McLaughlin Company
Jim Pace/Christian-Baker Company
Karen Izzo/Izzo Insurance
Kathleen Turknette/AmWINS
Keith Aderhold/Blue Goose Technology Solutions

Ken Hager/Preferred Property Program
Ken Masters/Brown & Brown
Ken Murray/KBK Insurance Group
Kim Graham/Overland Solutions
Larry Minner/Custom Harvest Insurance
Linda Boborodea/Business Risk Partners
Lisa Dascaloff/Triad Insurance
Lowell Fuller/Arthur J Gallagher
Marc Katz/The Mechanic Group
Mark Kollar/Edgewater Holdings
Michael Ray/Orchid Underwriters
Mike Lehner/The Mechanic Group
Ray Scotto/TMPAA
Rob Nuccio/RV Nuccio
Robert Thompson/World Wide Specialty Programs
Stephen Boyd/Arrowhead
Susan Richardson/Falls Lake Insurance Companies
Susan Rivera/V3 Insurance Partners
Tim McAuliffe/Ironshore

Thanks to Your Donations

The money raised in 2013 funded grants to the following organizations:

- 1 Gesu School**—Private school for disadvantaged inner city youth
- 2 SEED Foundation**—Program for at-risk college students from low income backgrounds
- 3 The Garage Community & Youth Center**—After school mentoring program for at-risk youth
- 4 United Military Care Inc.**—Work force reintegration support for military families

Since its inception, TMPAA Charities has provided over \$75,000 dollars in grants to organizations selected by Association members and approved by the Charities Board. In addition, your donations have also supported our “Packages from Home” initiative that provided almost 500 care packages and letters to our men and women serving in Iraq and Afghanistan. We are continuing this effort in 2014. Our initial investment in the micro loan organization KIVA has allowed us to support hundreds of small business in the developing world and now in the USA as well.



Cyber Liability Coverage for TMPAA Members

The TMPAA has brought together two trusted members of the Association to offer this tailored coverage for your agency or company.

Edgewater Holdings recently celebrated its 20th anniversary pioneering many current risk liability products. They have developed an expertise in Cyber Risk and created a coverage designed to meet the needs of TMPAA members.

The Law Firm of Wilson Elser has been a member of the TMPAA since 2002 and has an extensive Data Security and Cyber Liability Practice. Wilson Elser will be providing the Risk Management services available exclusively to TMPAA policy holders.

CYBER COVERAGES

- **System damage and interruption**
- **Privacy breach notification**
- **Media liability**
- **Cyber and privacy liability**
- **Regulatory and privacy**

RISK MANAGEMENT BENEFITS

- **24/7 toll free access to legal helpline, manned round-the-clock by expert privacy attorneys**
- **Wilson Elser experienced defense council and forensic experts specializing in data breach issues**
- **Research for each insured's customer notification obligations**
- **Access to developed relationships with key credit monitoring companies to mitigate service fees**

Contact the Association to arrange for a Cyber Stress Test for your agency and learn more about this important protection for your program business operation.

Sponsored E&O Coverage for Program Specialists

The Target Markets Program Administrators Association was established in 2001 to serve as an advocate for the issues that are important to Program Specialists. One of these critical topics has been Errors & Omissions coverage. The most important barometer of any professional liability policy is how vigorously it defends the policyholder in the event of a claim. Our legal defense team is Association Vendor Partner, Wilson Elser. Wilson Elser has over 25 years experience in the litigation of insurance agents

E&O. As part of the overall program, this firm will also conduct on-site loss control evaluations for all policyholders. The TMPAA E&O initiative will be administered by the member agency Rockwood Programs, Inc.

You can secure a non-binding indication of of premium for your agency by completing the "Two-Minute E&O Survey" found on the Association website under Association Services/ Resources.

Members interested in additional information about these programs can contact
Ray Scotto, Executive Director at
877-347-5700 or **ray.scotto@targetmkt.com**.



Play Your Game Without Interference

In an ultra-competitive program business marketplace, you need a partner who lets you call the plays.

State National provides the capacity and authority you need to serve your customers and capitalize on market opportunity. We also understand that you know your markets better than anyone, so we make sure you retain the freedom to run your business the way you want.

State National offers nationwide licensing in multiple lines of business, giving you access to a wide range of property and casualty products, programs, and markets through three A-rated Program Services insurers. With our Program Services, you can launch new programs quickly, capitalize on opportunity, and grow your business. And, with State National's hands-off approach to business, you run your own game plan.



Contact State National at: Luke@statenational.com (817) 265-2000 x 1212 statenational.com

14th TMPAA Annual Summit

THANK YOU TO OUR SPONSORS

GOLD SPONSORS



TRISTAR
INSURANCE GROUP



SILVER SPONSORS

- Allianz
- Gallagher Bassett
- Great American Insurance Group
- Philadelphia Insurance Companies
- Rough Notes
- State National Companies
- Travelers

BRONZE SPONSORS

- Advisen Ltd
- Allied World Insurance Company
- Berkley Custom Insurance Managers
- Chubb Group of Insurance Cos.
- Fireman's Fund Insurance Company
- Lloyd's America
- Sedgwick Claims Management Svcs.
- Vertibrands Marketing
- ValueMomentum, Inc.
- Western World Programs



Program Administrators Association

www.targetmarkets.com

Wilson Elser

salutes



Program Administrators Association

and the

14th Annual TMPAA Summit

October 20-22, 2014



150 East 42nd Street, New York, NY 10017-5639 p 212.490.3000 f 212.490.3038

Albany • Baltimore • Boston • Chicago • Connecticut • Dallas • Denver • Garden City • Houston • Kentucky • Las Vegas
London • Los Angeles • Miami • Milwaukee • New Jersey • New York • Orlando • Philadelphia • San Diego • San Francisco
Virginia • Washington DC • West Palm Beach • White Plains Affiliates: Berlin • Cologne • Frankfurt • Munich • Paris



FOCUSED
EXCLUSIVELY ON PROGRAMS



AGILE
RESPONSE AND SERVICE



PARTNERS
WHO UNDERSTAND YOUR NEEDS



COMMITTED
TO DELIVERING RESULTS

At York Programs we understand programs better than anyone else because that's all we do. We don't have to tailor our claims, risk control and alternative risk solutions to programs because we developed them specifically for programs in the first place.

From a dedicated division to your dedicated team of experts...York Programs is the partner you need for the results you want.



CLAIMS MANAGEMENT | RISK CONTROL | ALTERNATIVE RISK
www.YORKRSG.com

WE SHARE YOUR PASSION FOR BUILDING SUCCESSFUL PROGRAMS.

When you're passionate about what you do and the industries you serve, you want a carrier that is just as passionate. Zurich has been committed to programs for more than 50 years serving some of the most unique and specialized market segments. And because they understand programs, they can best help you protect the businesses you serve while helping you grow.
zurichna.com/programs



**ZURICH INSURANCE.
FOR THOSE WHO TRULY LOVE THEIR BUSINESS.**



Great Marketing Results

Aren't Pie In The Sky!



CAST: Customized Agency
Sales Tools enhance
broker efforts

Marketing Automation:
In/outbound emails and tracking

Domain Expertise:
15+ years of
insurance marketing

Strategic Analysis:
Define your intent,
market positioning,
values, benefits

Brand Development:
Program Brands, Logos,
Taglines, Stationery

Marketing Awards
TMPAA, IMCA
& NAPSLO

Market Research:
Analysis of your market
potential & positioning
versus competitors



**Vertibrands Serves Up Award-Winning Marketing
to Leading Specialty Program Administrators**

Call or text **Richard Look** at **610-322-3702** to
schedule an on-site **Scottsdale TMPAA** meeting



VERTIBRANDS®
Insuring Marketing Success for MGAs

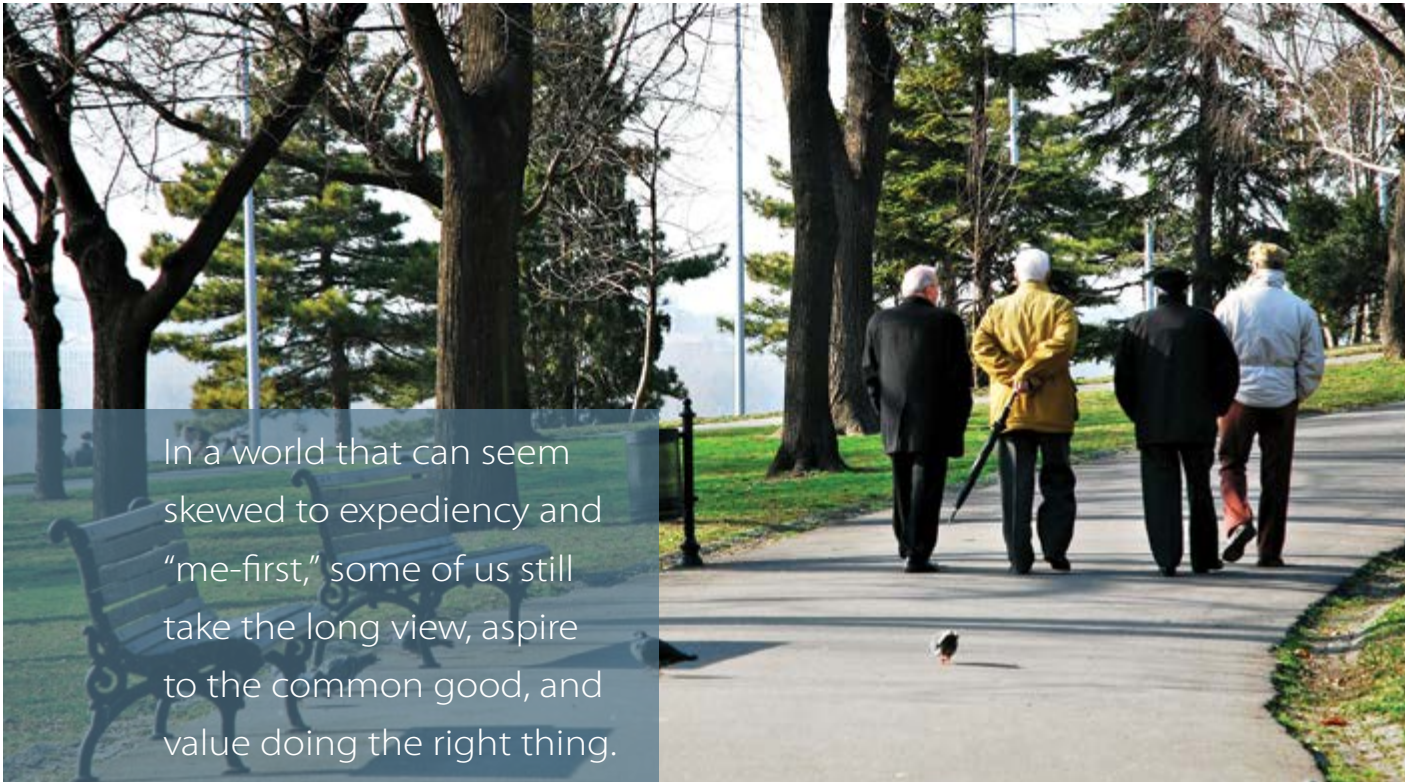


www.vertibrands.com



TRISTAR

making the right choice



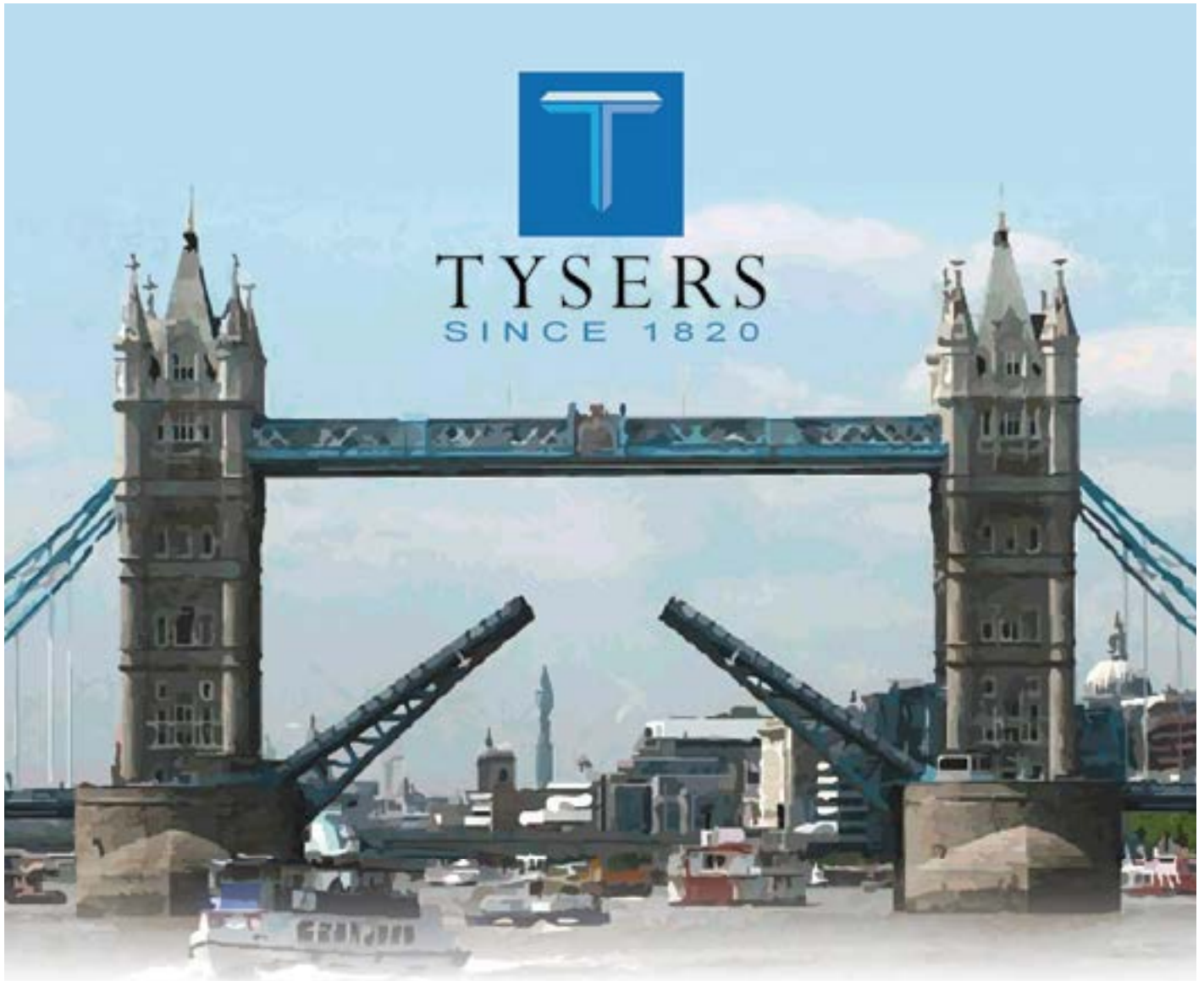
When Summit Health engaged us to manage their claims portfolio, our review of their data identified a statistical trend confined to four specific hours each week. We recommended they increase staffing during these critical morning hours, and Workers' Compensation claims dropped 40% – a savings they used to hire more caregivers.

Make the right choice for your claims management program.

Choose TRISTAR. Contact us at info@tristargroup.net or 888.558.7478

transforming risk into opportunity





Opening up the London Market

If you would like to meet any of our delegates at the 14th Annual TMPAA Summit, please contact
Richard Hodge Cell: +44 (0)7971 501 732 Email: richard.hodge@tyasers.com

International Insurance and Reinsurance Brokers
Reputation, professionalism and experience

Program Book Sponsors



Gallagher Bassett Services, Inc.



TYASERS



A Member of the Tokio Marine Group