

2015 TMPAA Mid-Year Meeting

May 4-6 • Hyatt Regency • Atlanta, GA

***Defining Innovation & Excellence
in Program Business***

in'-no-vate (-va-ted, -va-ti)
alter by introducing something
(novelties) ; to make change
in-no-va'-tion, n.
something new and cor
in'-no-va-tor, n. [L.
in-nox'-ious (-nok')

TARGET  MARKETS

Program Administrators Association

Where Program Business Gets DONE

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Program Administrators Association

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Welcome to Atlanta and our 2015 Mid-Year Meeting—*Where Program Business Gets Done!*

The next few days will be packed with exciting opportunities for networking and learning highlighted by two impressive keynote speakers. Tom Brokaw will offer his reflections on the current American landscape, the challenges of a new millennium, and his vision on how we can restore America's greatness. Well known for his distinguished journalism career spanning several decades, Brokaw is also the author of *The Greatest Generation*, one of the top-selling non-fiction books of the 20th century. Back by popular demand is our industry speaker, Dr. Robert Hartwig, President and Economist of the Insurance Information Institute, who will give his view of the state of the industry with an eye toward program business.

The TMPAA seeks to continually improve by directly responding to the expressed needs and interests of members in a variety of ways:

- In March, a new offering, "Program Business Operations Boot Camp," was held in New Orleans presented by ReSource Pro. Attendees experienced an intensive two-day hands-on workshop designed to assist program business leaders in facilitating growth and profitability.
- You will notice workshop topics in the coming days focused on the London market including Tuesday's presentation entitled "Solving the Challenge of Small and Start-up Programs." Attendees will hear from several Lloyd's markets recently admitted as members of the Association that are committed to these specific capacity gaps. A companion workshop is scheduled for Wednesday morning to provide the blueprint for becoming a Lloyd's Coverholder.
- This meeting's agenda also makes evident our dedication to providing the tools that you need to collect and analyze the data required to create stronger carrier relationships and achieve greater access to available capacity.

The more our members actively participate and provide suggestions for improvement, the stronger our Association will be. Please complete the survey you will receive after the meeting and include your constructive feedback. I also encourage you to seek out any of the Advisory Board members and/or Association staff members to discuss ideas you may have for improving our organization. As we look toward the future, the 5th annual State of Program Business Study, which establishes key benchmarks for program administrators, will be conducted later this year. Please participate in this nationally recognized research project that helps all of us better understand our industry, our performance relative to our peer group and where we may look to improve our operations.

We expect over 600 program business professionals to attend the Mid-Year Meeting so I hope you will get out there and re-connect with old friends and make meaningful new connections. This is indeed "Where Program Business Gets Done" but it is up to you to take advantage of the opportunity and get it done.

Have a great meeting!

A handwritten signature in black ink that reads "Heidi Strommen". The signature is fluid and cursive, with a long horizontal line extending from the end.

Heidi Strommen
TMPAA President



2015 Mid-Year Mobile App

Get meeting information on your phone or tablet!

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Scan the QR code to download or search “TMPAA” in app store.


USERNAME: Your meeting registration email address

PASSWORD: 2015midyear

Features

The 2015 Mid-Year Meeting app provides more information than ever to help you realize all our event has to offer. Find the Agenda, Attendees, Speakers, Sponsors, White Papers and other resources to help 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! Save specific Carriers and Vendors to the **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 .

Venue: View labeled hotel floor plans so you can locate all Mid-Year events.

My Notes: Take down meeting-related notes here and email them to yourself or others later.

Surveys: We want your feedback! Certain sessions and workshops include a short survey available in your app. Take a few minute to share your thoughts.

Mobile App Sponsored by:



AGENDA

Where Program Business Gets Done

Monday, May 4

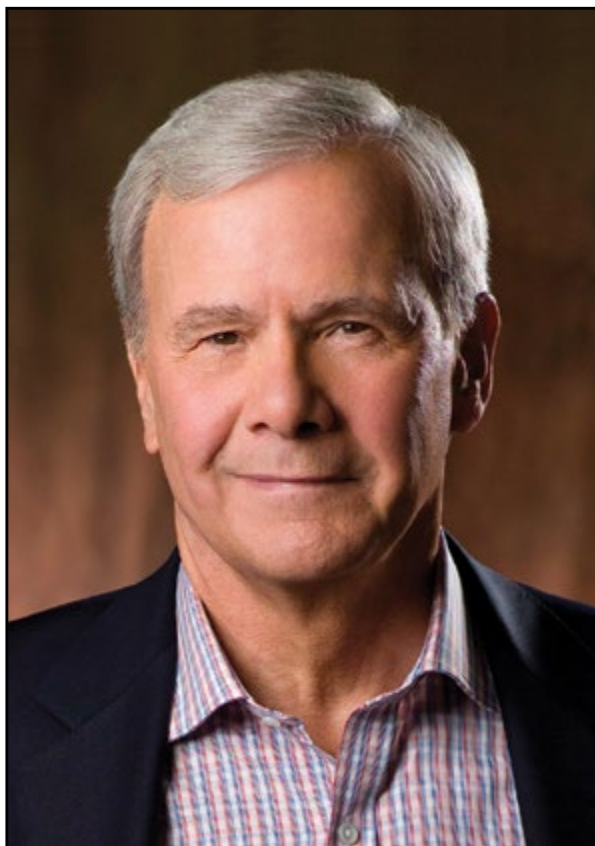
- 8:00 a.m. **Registration Table Opens**
- 8:00 a.m. **Networking Lounge Opens**
- 11:00 a.m. **Trade Show Opens**—sponsored by *NetRate Systems*
- 12:00 p.m. **Networking Lunch**—sponsored by *Philadelphia Insurance Companies*
- 2:30–3:30 p.m. **Workshop: Data—A Valuable Commodity**—sponsored by *BMS Intermediaries*
- 4:00–5:00 p.m. **Program Administrator Town Hall**—sponsored by *Rough Notes*
- 5:00–6:30 p.m. **Welcome Reception**—sponsored by *Hudson Insurance*

Tuesday, May 5

- 7:00 a.m. **Networking Breakfast**—sponsored by *Gallagher Bassett*
- 8:00 a.m. **Networking Lounge Opens**
- 8:00 a.m. **Trade Show Opens**—sponsored by *NetRate Systems*
- 8:30 a.m. **General Session—Association Announcements**
Keynote Speaker: TOM BROKAW
—sponsored by *York Programs* and *Wilson Elser*
- 10:30 a.m. **Workshop: Solving the Challenge of Small & Start Up Programs**
—sponsored by *Tysers*
- 12:00 p.m. **Networking Lunch**—sponsored by *Western World Programs*
- 12:00 p.m. **Women's Networking Lunch**—sponsored by *Allianz*
- 1:00–5:00 p.m. **Carrier Meetings**—sponsored by *Travelers*
- 5:00–6:30 p.m. **Networking Reception**—sponsored by *Zurich*

Wednesday, May 6

- 7:00 a.m. **Networking Breakfast**—sponsored by *Rockhill Specialty Programs*
- 8:00 a.m. **General Session—Announcements, CPL Designations, Marketing Awards**
Industry Speaker: Robert P. Hartwig, CPCU, President, I.I.I.
—sponsored by *Western World Programs*
- 10:00–11:00 a.m. **Workshop: Target University presents Program Administrator Contracts**
- 10:00–11:00 a.m. **Workshop: Evaluating the Financial Strength of Program Market Carriers**
- 11:00 a.m.–12:00 p.m. **Workshop: Demystifying Lloyd's of London & Accessing this Program Resource**
- 11:00 a.m.–12:00 p.m. **Workshop: Data, Data Everywhere—How Do I Collect?**
- 12:00 p.m. **Networking Lunch**



2015 TMPAA Mid-Year Meeting

Keynote Speaker: **TOM BROKAW**

Tom Brokaw has spent his entire distinguished journalism career with NBC News beginning in 1966 in the Los Angeles bureau where he covered Ronald Reagan's first run for public office, the rise of the Sixties counter culture, the assassination of Bobby Kennedy and the 1968 presidential campaign.

From Los Angeles, Brokaw went to Washington as the White House correspondent during Watergate and as the principal back up for John Chancellor as anchor of NBC Nightly News. Next stop: New York and TODAY followed by his appointment as anchor and managing editor of NBC Nightly News with Tom Brokaw.

He took over Meet the Press for the 2008 campaign when his close friend and colleague Tim Russert died.

In addition to his daily news gathering responsibilities, Brokaw reported on more than thirty documentaries covering subjects ranging from AIDS, Los Angeles gangs, race, education, medicine, immigration and global warming.

He has an impressive list of firsts, including the first interview with Mikhail Gorbachev; the first network report on human rights abuses in Tibet accompanied by an exclusive interview with the Dalai Lama; the only American network anchor to report from Berlin the night the Berlin wall came down.

In 1998 Brokaw published his first book, *The Greatest Generation*, one of the most popular non-fiction books of the 20th century. He followed that with five other books, including *BOOM! Voices Of The Sixties* and most recently, *The Time Of Our Lives*.

He is also a popular essayist for publications ranging from *The New York Times* to *Rolling Stone* and a wide assortment of other periodicals and newspapers. He can be heard weekdays on his daily radio segment, *An American Story*, on Clear Channel radio stations nationwide addressing a wide range of topics—from newsworthy current events to historic figures to notable moments in history—which impact the lives of Americans today.

Brokaw has won every major award in his craft, including Peabody, Duponts, Emmys and lifetime achievement recognition.

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

Mark Gardella

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Cell: 775.224.5249

Jessica Ferguson

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Cell: 857.654.3831



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Industry Speaker: **ROBERT P. HARTWIG**

Robert P. Hartwig is president of the Insurance Information Institute. Since joining the I.I.I. in 1998 as an economist and becoming chief economist in 1999, Dr. Hartwig has focused his work on improving understanding of key insurance issues across all industry stakeholders including media, consumers, insurers, producers, regulators, legislators and investors.

Dr. Hartwig previously served as director of economic research and senior economist with the National Council on Compensation Insurance (NCCI) in Boca Raton, Florida. He has also worked as senior economist for the Swiss Reinsurance Group in New York and as senior statis-

tician for the United States Consumer Product Safety Commission in Washington, D.C. He is a member of the American Economic Association, the Insurance Industry Charitable Foundation, the National Association of Business Economics and the CPCU Society.

Currently, Dr. Hartwig serves on the board of directors of the American Risk and Insurance Association and the Griffith Foundation for Insurance Education. Dr. Hartwig has authored and co-authored papers that have appeared in numerous publications, and makes frequent presentations to industry associations, company management, industry executives, analysts and clients and speaks internationally on a wide range of insurance issues. He has testified before numerous state and federal regulatory and legislative bodies, including the U.S. Senate Judiciary Committee, the Senate Banking, Housing and Urban Affairs Committee, the House Financial Services Subcommittee on Capital Markets, Insurance and Government Sponsored Enterprises and the House Financial Services Subcommittee on Oversight and Investigations and the House Committee on Transportation and Infrastructure.

Dr. Hartwig serves as a media spokesperson for the property/casualty insurance industry, and is quoted frequently in leading publications such as The Wall Street Journal, The New York Times, USA Today, Washington Post, Los Angeles Times, Financial Times, BusinessWeek, Newsweek, U.S. News & World Report, CFO, Fortune, Forbes, The Economist and many others throughout the world. Dr. Hartwig also appears regularly on television, including programs on ABC, CBS, NBC, CNN, CNBC, Fox, PBS and the BBC.

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2015 TMPAA Mid-Year Meeting

PRESENTATIONS/WORKSHOPS

MONDAY, MAY 4

► 2:30 to 3:30 p.m. Hanover A & B

DATA—A VALUABLE COMMODITY

This will be two separate workshops, one focused on casualty and the other on property.

BMS Property Data Presenters:

DANIEL MADSEN—Senior Vice President, Catastrophe Analytics

ANDREW BUSTILLO—President and CEO

BMS Casualty Data Presenters:

DAVID SPIEGLER—Executive Vice President & Chief Actuary

DAWNMARIE BLACK—Senior Vice President

“You can have data without information, but you cannot have information without data.”—Daniel Keys Moran

These workshops focus on the importance of quality data collection. Good data helps you manage and understand your own business, but also helps you create stronger carrier relationships and offers greater access to available capacity. We will explain in depth what really happens to your program when it is submitted to an insurance company. We will explain the minimum information required for capacity providers to consider and measure risk, and also show what can be achieved when excellent data is provided. In this new world of alternative capital, with an abundance of industry capacity, how will you maximize your share?

► 4:00 to 5:00 p.m. Regency 5

2015 PA TOWN HALL MEETING ON INNOVATION AND EXCELLENCE

Moderator: JEREMY HITZIG—Distinguished Programs

Panel: SEAN CURTIN—HCC Specialty

SCOTT YOUNG—Bellingham Underwriters

TIMOTHY TOMPKINS—Hagerty Group

With the extraordinary level of expertise and talent that exists inside the TMPAA, it is no surprise that the ability to learn from your peer group has always ranked high among our many Association benefits.

At this year's Town Hall, we are featuring a few program administrator members to tell their success stories about an innovation in their design that significantly improved their program business operation. We used the following definition of innovation to select our panel:

- The introduction of something New—a new idea, approach or business model
- A New idea that kicks butt in the marketplace

Come listen to your innovative peers and take away a few ideas you can use to improve your agency.

TUESDAY, MAY 5

► 10:30 a.m. Regency 5

SOLVING THE CHALLENGE OF SMALL AND START UP PROGRAMS

ROBIN BARKER-HAHLO—Tysers

DUSTY ROWLAND—Fulcrum Insurance

SCOTT YOUNG—Bellingham Underwriters

KEVIN FLACK—Atrium Underwriters

NEIL MCMILLAN—Canopus

The past two program business studies conducted by the TMPAA identified the reluctance of carriers to write start up program business as the #1 challenge for program administrators. Finding markets for small programs has also been identified by our members as a significant issue.

Attendees at this presentation will hear from several Lloyd's markets recently admitted as members of the Association to address these specific capacity gaps. The Association's exclusive London Broker, Tysers, will lay the groundwork for accessing Lloyd's/London Markets as a program resource, and our program administrator moderator will challenge the panel to get specific regarding their plans to work with our members, enabling them to expand their operations.

A companion workshop is scheduled for Wednesday morning to provide the blueprint for becoming a Lloyd's Coverholder.

Show up with your questions and let us know if this solution works for you.

► 12:00 p.m. Hanover F & G

WOMEN'S NETWORKING LUNCH— MUCH ADO ABOUT GENDER IN INSURANCE

ERIN HAMRICK—Partner, Sterling James

Erin Hamrick grew up in the insurance industry working for both a carrier and broker, before porting her experience to insurance executive search where she was a Partner in the Insurance Practice for one of largest global executive search firms.

In 2010, Erin started her own insurance recruiting firm, Sterling James. Erin will discuss her passion for research spotlighting the challenges associated with diversity in insurance and share some of the results to date. Additionally, Erin will disclose insights into recruiting the most senior executives in the industry and the implications for women in a male dominated industry. YES, Gender Does Matter.

Finally, and time permitting, Erin will also discuss her decision to take a leave of absence in 2004 to support the government's effort in the reconstruction of Iraq.

2015 TMPAA Mid-Year Meeting

PRESENTATIONS/WORKSHOPS

WEDNESDAY, MAY 6

▶ 10:00 a.m. Hanover A

TARGET UNIVERSITY PRESENTS: PROGRAM ADMINISTRATOR CONTRACTS— “I’ve Looked at Life from Both Sides Now”

GREG THOMPSON—Markel Specialty

This unique workshop will explore the critical elements of developing an effective program administrator contract from both the PA and carrier perspectives—all from one individual. Greg Thompson built THOMCO into one of the premiere program agencies in the country, executing numerous MGA contracts over 20 years. When he partnered with Markel Specialty in 2012, Greg found himself developing PA contracts for a program market. Spoiler Alert: A well-constructed contract protects both the administrator and the carrier while strengthening this important relationship.

Attendees should expect to gain valuable insight regarding the key elements of these contracts, the legal basis of the carrier/agency relationship and other important considerations that go into developing a balanced contract.

Specific topics to be covered include:

- Ownership of Records and Expirations
- Exclusivity • Ownership of Claims Data
- Negotiating Terms: Commission, Payment, etc.
- Termination • Profit Sharing • Trust Funds
- Suspension • Financial Guarantees to Carrier
- Audits • Run-off-Provisions
- Non Disclosure Agreements (NDAs)

Program administrators and carriers are encouraged to bring their questions and experiences to share and discuss.

▶ 10:00 a.m. Hanover B

EVALUATING THE FINANCIAL STRENGTH OF THE P&C MARKET, MARKET CONDITIONS & PROGRAM CARRIERS— WHAT TO EXPECT IN 2015

DAVID PAUL, ALIRT Insurance Research

Attendees should expect to hear how market cycles have impacted the financial strength of carriers – for both good and bad – in the past, how the traditional cycle may be changing, and what this means for carrier financial strength going forward. The presentation will include an evaluation of P&C market conditions from a number of financial vantage points and discuss the likely direction of rates based on this analysis. Also covered in this presentation will be recent financial results for insurers active in the program market as well as an explanation of the new TMPAA Program Carrier Report, sent to all PA members of the Association in late 2014.

▶ 11:00 a.m. Hanover A

DEMYSTIFYING LLOYD’S OF LONDON AND ACCESSING THIS PROGRAM MARKET RESOURCE

GLENN DORR—Lloyd’s

This is the companion workshop to the presentation outlining the unique opportunities the Lloyd’s Markets offer to program administrators. The Tuesday presentation “Solving the Challenge of Small and Start Up Programs” detailed how the Lloyd’s Markets can address several of the market capacity issues facing program specialists to grow existing business and develop new products.

Unlike many other insurance brands, Lloyd’s is not a company; it’s a market where its members join together as syndicates to insure risk. This Demystifying Lloyd’s presentation will provide concrete information program administrators need to begin accessing the London Markets. Attendees at this workshop can expect the following:

- Lloyd’s of London 101—A primer about Lloyd’s, its operations, its history, and how the corporation of Lloyd’s supports and works with Lloyd’s brokers
- The role of the London Broker
- Process of becoming a London Coverholder

Leave this workshop with the information, contacts and tools to access the opportunities Lloyd’s can provide for your program operation.

▶ 11:00 a.m. Hanover B

DATA, DATA EVERYWHERE— HOW DO I COLLECT

WAYNE UMLAND, Wayne Umland Consulting, LLC

Knowing that data, information and analytics is critical, this workshop will explore how we identify the data we need and capture it through the technology in place at the company. How we capture the data, where it is stored and how is it reported are just the first three basic questions that need to be answered. We’ll look at what systems and technology vendors bring to the table from an analytics perspective and how that can be used to your advantage.

PRESENTERS

Biographies Listed by Name, Company

INDIVIDUAL	COMPANY	PAGE	INDIVIDUAL	COMPANY	PAGE
Barker-Hahlo, Robin	Tysers	11	McMillan, Neil	Canopus	12
Black, Dawnmarie	BMS Intermediaries	11	Paul, David	ALIRT Insurance Research	12
Bustillo, Andrew	BMS Intermediaries	11	Rowland, Dusty	Fulcrum Insurance	12
Curtin, Sean	HCC Specialty	11	Spiegler, David	BMS Intermediaries	13
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Robin Barker-Hahlo—Tysers

Robin Barker-Hahlo is a Director in the North American and International Specialist Property and Casualty Division at Tyser & Co in London. He has over 25 years of insurance and reinsurance broking experience, with a specialist emphasis on structuring and placing delegated underwriting facilities. Prior to joining Tysers in 2008, Robin was a Director at R.K Carvill Reinsurance Brokers where,

for almost 20 years, he had focused on developing relationships between US program managers and the London market.



Dawnmarie Black—Sr. Vice President, BMS Intermediaries

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 Intermediaries

As President and CEO, Andrew Bustillo 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.



Sean Curtin—HCC Specialty

Sean Curtin is a Senior Vice President at HCC Specialty, a subsidiary of HCC Insurance Holdings. He oversees and directs two profit centers which includes Contingency and Commercial Package Insurance. His business is predominantly focused in the sports, hospitality, entertainment and leisure insurance niche. Sean is a graduate of Salem State University where he earned a BS in

Business Administration with an Accounting concentration. A veteran of the specialty insurance marketplace, Sean has been with HCC for 17 years. Prior to HCC Specialty, he was the president, CEO and principal owner of a boutique weather and contingency insurance MGA where he grew this start-up to \$2.5M in profitable premium in less than 15 months. He sold this business to ASU International in 1999, now called HCC Specialty.



Glenn Dorr—Lloyd's

Glenn joined Lloyd's in September 2012 as US Northeast Regional Director. In his role, he is responsible for market development activities in an 11 state region stretching from Maryland to Maine, including Washington DC focused on ensuring that Lloyd's is understood and accessible to everyone with a current or potential future relationship with the Market.

With more than 20 years of experience in the standard and surplus lines sectors, including as former Senior Vice President of HCC Specialty, Glenn is well-versed in the Lloyd's market. He studied at the University of London, graduated from the College of Wooster and earned an MBA from Lake Forest Graduate School of Management. The Northeast region is one of four established by Lloyd's America in late 2010 to reinforce Lloyd's commitment to its distribution partners in this historically important customer base for the market. As a leading provider of natural catastrophe capacity in this part of the country, Lloyd's also writes a wide range of specialty lines coverages on an open market basis and through the binding authorities extended to more than 200 coverholders.

**Kevin Flack**—Atrium Underwriters

Kevin Flack is the Property and Casualty Underwriter at Atrium, Lloyd's Syndicate 609. Kevin started his career in 1998 with the Lloyd's Graduate Training Scheme while at Sphere Drake before joining Syndicate 1224 and then joining Atrium in 2000. Kevin is an Associate of the Chartered Insurance Institute and in 2011 completed the Lloyd's Leadership Program at London Business School.

Atrium is a recognized Lloyd's leader for MGA-sourced property and casualty insurance. The Syndicate's P&C portfolio includes a broad range of SME insurance products offered across the US and distributed through both traditional binding authorities and online programs via AUGold. Atrium writes in all 50 US States (admitted in Kentucky and Illinois) working in partnership with Lloyd's brokers and coverholders to offer attractive insurance products and service for customers throughout North America.

**Erin Hamrick**—Sterling James

Erin grew up in the insurance industry working for both a carrier and broker, before adapting her experience to insurance executive search where she was a Partner in the Insurance Practice for one of the largest global executive search firms. In 2010, Erin started her own insurance recruiting firm, Sterling James. In 2014, Erin was named in Reactions Magazine as one of the "Top 50 Women in

Re/Insurance." She is a contributing writer for Carrier Management and a supporter of research efforts to better understand gender disparity in the insurance industry. Erin is a graduate of Villanova University.

**Jeremy Hitzig**—Distinguished Programs

Mr. Hitzig began his insurance career in 1995 as a principal at Capital Risk Strategies where he focused on emerging risk transfer tools including catastrophe bonds and other blended capital markets/insurance products. He joined The Distinguished Programs Group (DP) in 1997 and held a number of executive positions before being named CEO in 2006.

DP is a New York-based program administrator specializing in the real estate industry with operating units including ReSource Pro, a back-office support and remote staffing operation in Qingdao, China and Saranac Insurance Company, a Barbados-based captive.

In addition to being a director of DP, he is a member of the board of Target Markets and Accord Financial Corp. (2005-08), a publicly traded financial services company. DP is a founding member of Target Markets and a recipient of the Best Practices designation. In 2007, Inc. Magazine named DP as one of America's Top 5,000 Fastest Growing Companies and the IAOP and Fortune Magazine recognized ReSource Pro as a "rising star" and one of the Top 100 Global Outsourcing Companies.

Mr. Hitzig is a graduate of McGill University and received his MBA from Columbia Business School in New York. He also holds the Chartered Financial Analyst and Chartered Property and Casualty Underwriter designations. He has been a member of the Young Presidents Organization (YPO) since 2006.

**Daniel Madsen**—BMS Intermediaries

Dan Madsen joined BMS Intermediaries in November 2011 as Sr VP of the Catastrophe Analytics team, where he manages the team's modeling projects. Dan is located in Minneapolis. Dan has more than 15 years of industry experience, previously working as a director for Aon Benfield's catastrophe risk modeling department. He also served at Willis Re for 8 years as one of the senior managers in its

catastrophe modeling team. Dan's experience includes personal lines, commercial lines, large account and workers' compensation portfolios with exposures in Florida and U.S. nationwide. Dan has a B.A. in Economics from Minnesota State University.

**Neil McMillan**—Canopus

Neil McMillan is a 32 year veteran of the London market whose career has spanned working for both Lloyd's Syndicates and International Insurance Companies. He specializes in working with US domiciled MGAs within the Property and Casualty sector writing the smaller commercial and personal lines accounts.

**David Paul**—ALIRT Insurance Research

David Paul is a partner at ALIRT, a firm specializing in the analysis of insurance company financial performance trends. ALIRT's quarterly insight into the underlying financial strength of insurers allows distributors and buyers of insurance products to anticipate financial stress and/or rating downgrades of insurance partners before they occur.

David was a founding member of ALIRT Insurance Research (1999), building out the company's life, property/casualty and health insurance company analytical models/services. David currently co-directs the company's research staff, manages internal IT initiatives and new product development, and is active in the industry as an author and public speaker. David graduated with a B.A. in classical studies from Washington University, St. Louis.

**Dusty Rowland**—Fulcrum Insurance

Dusty Rowland founded Fulcrum Insurance Programs, a Bellevue, Washington-based national program administrator and specialty wholesale broker, in 2008 as Mainstay Insurance Group. In 2011, the company rebranded as Fulcrum Insurance Programs to reflect its commitment and success in delivering innovative, profitable programs to its carrier and agency partners. Dusty has a strong

background in developing program business, having co-founded National Specialty Underwriters, Inc. (NSU) in 1995, a program administrator that serves retail agents and brokers looking for niche expertise and exclusive products. Fulcrum offers unique programs for Hotels/Resorts, Casinos, Habitational and Real Estate. The programs include an exclusive comprehensive platform through the Association of Green Property Owners and Managers (AGPOM), which provides coverages for members who pursue a green-building strategy and an array of resources to promote and reward green-building efforts. Dusty is a Director at AGPOM. Dusty holds a B.S. in Economics from the State University of New York College at Plattsburgh.



David Spiegler—BMS Intermediaries
David Spiegler is Exec VP & Chief Actuary for BMS Intermediaries, Inc. He is responsible for all analytical services, including actuarial and catastrophe modeling, for both clients and prospects. He has over 32 years of insurance and reinsurance industry experience, including pricing, reserving, risk modeling, underwriting, senior management, consulting, and risk management. He is based in

New York City. Prior to joining BMS in 2005, he was President of DS A.I.R. Consulting, LLC, a firm he founded to provide actuarial, insurance, reinsurance and arbitration consulting services. Before that, Spiegler spent over 15 years at American Re-Insurance Company (now Munich Re America), where he was Sr VP & Chief Actuary. He also served as Chief Underwriting Officer for American Re Financial Products, and as the Underwriting Manager of the Western Treaty Region of American Re's Domestic Insurance Company Operations division. Prior to American Re, Spiegler gained experience at the Home Insurance Company and the New York Compensation Insurance Rating Board. Spiegler obtained his BS degree in Mathematics, with honors, from the University at Albany (SUNY). He is a Fellow of the Casualty Actuarial Society, a Fellow of the Conference of Consulting Actuaries, a Chartered Enterprise Risk Analyst, and a Member of the American Academy of Actuaries.



Greg Thompson—Markel Specialty
Greg Thompson, CPCU, ARM, CPL graduated cum laude from Washington and Lee University with a liberal arts degree in 1973 and obtained an MBA at the University of Virginia's Darden School in 1975. Greg served on the faculty of the European Institute of Business Administration (INSEAD) in Fontainebleau, France for several years before joining Marsh & McLennan in New York in their Multi-national Services Division. In 1979, Greg and his father, Roy Thompson, jointly founded Thompson Insurance Enterprises, Inc. (THOMCO) headquartered in Atlanta.

Over a period of 30+ years, Greg built THOMCO from a fledgling wholesale insurance operation to a Program Administrator writing \$170,000,000 in annual premium involving over 15 national programs. Greg is also a former President and current Board member of the TMPAA, as well as Dean of Target University.

On January 1, 2012, THOMCO was sold to the Markel Insurance Company and in November, 2012, Greg was promoted to President of Markel Specialty. Effective April 2015, Greg has moved on to a part-time position with Markel as Senior Managing Executive focused on Program business.

Greg has earned the CPCU, ARM and CPL designations and has been the author of numerous articles in a variety of industry publications including Agent and Broker, Rough Notes, National Underwriter and Insurance Journal.



Timothy Tomkins—Hagerty

As Executive Vice President of Business Development, Tim leads Hagerty's business development team in meeting key growth opportunities. He is also developing key strategic partnerships with other insurers and insurance providers in order to increase the availability of Hagerty insurance products to a broader spectrum of U.S. and international insurance clients and potential clients.

After clerking in the Supreme Court of New York, Tim joined the law firm of Lane Powell in Seattle and became a partner and led the firm's efforts to develop and expand its international insurance practice. He spent nine months in the London insurance market on loan to several Lloyd's syndicates, London market insurance companies, managing agencies, brokers and regulatory entities. He then joined the law firm of Cozen O'Connor where he represented international insurance and reinsurance companies and Lloyd's syndicates in insurance and reinsurance matters, including policy drafting, insurance coverage and the development of new products and programs.

Tim received his Bachelor of Arts in Economics from St. Lawrence University in Canton, New York; and his Juris Doctorate from the University of Notre Dame. Tim is a member of the New York, Washington and Michigan Bars, and is admitted to practice in several Federal Courts.



Wayne Umland—

Wayne Umland Consulting, LLC

Wayne is founder and principal of Wayne Umland Consulting which he formed after retiring after 17 years as Exec VP & CIO of 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, telecommu-

nications, 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.

Wayne's current work includes 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.



Scott Young—Bellingham Underwriters

Scott is a Commercial Lines Underwriter for Bellingham Underwriters, an MGU that's primary focus is on transportation. They are recognized as an industry leader in the sector and use critical thinking in every decision. This allows them to come to the best possible solutions for their producers and carrier partners alike. Scott has been in his present position for 14 years where he uses his in-

depth knowledge to underwrite and manage a book of commercial trucking business. He is also responsible for researching and developing new programs, reviewing and revising rate plans, developing coverage forms and negotiating terms and conditions of contracts. Scott was the 2013 winner of the Tysers Targeting Talent Trophy at the TMPAA Summit which included a trip to London in February 2014. Following this trip, with the help of Tysers, he worked to make Bellingham Underwriters an approved Coverholder with Lloyd's of London. He then used the relationships that he developed with certain Underwriting Syndicates to negotiate and secure the placement of a Lloyd's Binding Authority for Bellingham Underwriters. Scott is also actively pursuing his CPCU designation with the hopes of finishing sometime in 2016. Scott is a graduate of Western Washington University.



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TMPAA STAFF MEMBERS



RAY SCOTTO, *Executive Director*

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

Director of Convention and Accounting Services

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

Director of Membership Development

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

Director of Marketing Communications

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 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.



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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.

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(l. to r.) Linda Boborodea, Elisa Higgs, David Springer, TMPAA President and presenter of the CPL Awards, Margaret Valverde, Barbara Bartson and Albert Leung

Target University: CPL CHALLENGE Calling all TMPAA Program Administrators

Complete all the requirements for your CPL Designation prior to the Summit to receive \$500 from Greg Thompson, Target University Dean. All program administrator members of the TMPAA who complete the coursework and meet the following CPL requirements are eligible:

- Minimum 5 years experience in the Insurance Industry
- 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
- Two endorsements

For assistance with Target University, contact Monica Elischer, Director of Membership Development at monica.elischer@targetmkt.com or 302-268-1013.



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With the assistance of the Program Business Study committee and the TMPAA Board, the 2015 Program Business study questionnaire is in final development.

TMPAA members can expect to receive the survey via email in early June.

The objective of this research is to provide the program industry with information that documents trends in the size and dynamics of the program business market, along with valuable benchmarking tools to assist with your future program business planning. Full results will be available to TMPAA members.

Study information is confidential and not viewable by any association members or staff.

Our goal is to have all TMPAA members participate.

Thank you

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—Dusty Rowland, President & CEO, Fulcrum Insurance Programs

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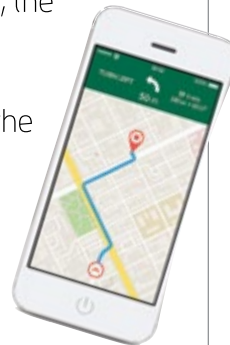
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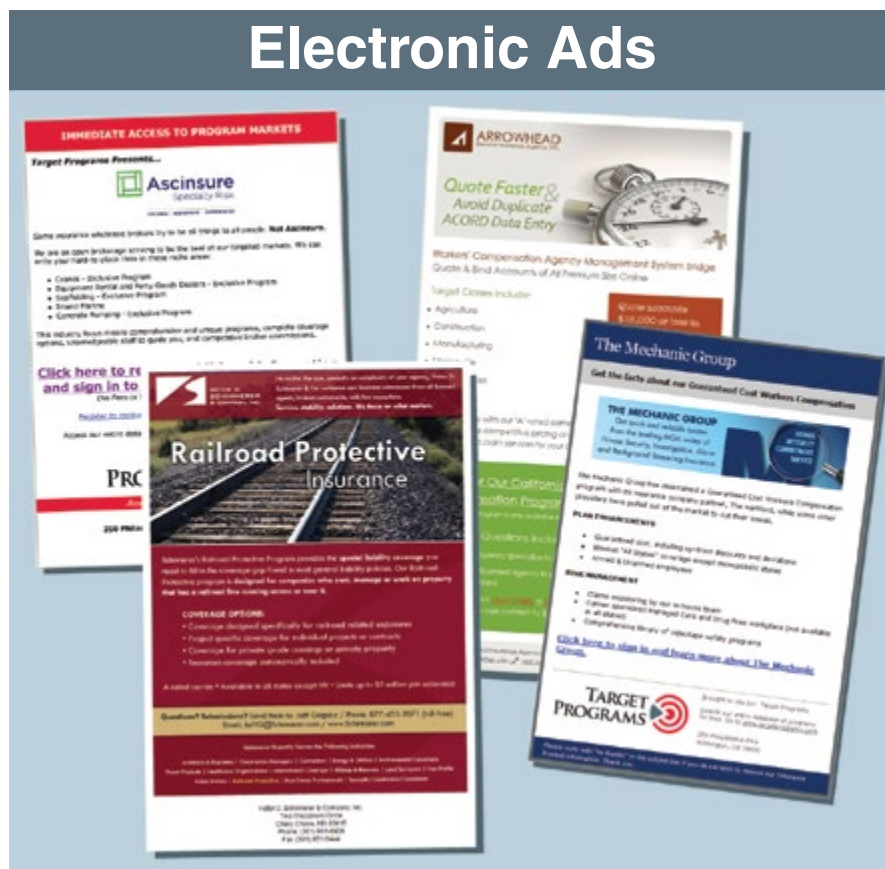


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Henry M. Paulson, Jr.**

Henry M. Paulson, Jr. served under President George W. Bush as the 74th Secretary of the Treasury from July 2006 until January 2009. As Treasury Secretary, Paulson was the President's leading policy advisor on a broad range of domestic and international economic issues.

Before going to the Treasury Department, Paulson had a thirty-two year career at Goldman Sachs, serving as Chairman and Chief Executive Officer since the firm's initial

public offering in 1999. He is involved in a range of conservation and environmental initiatives having served as Chairman of The Peregrine Fund, Inc., Chairman of the Board of Directors for the Nature Conservancy and was Co-Chairman of its Asia/Pacific Council.

Prior to joining Goldman Sachs, Paulson was a member of the White House Domestic Council, serving as Staff Assistant to the President from 1972 to 1973, and as Staff Assistant to the Assistant Secretary of Defense at the Pentagon from 1970 to 1972.

Paulson graduated from Dartmouth College in 1968, where he was an English major, a member of Phi Beta Kappa, and an All-Ivy, All-East football player. He received an M.B.A. from Harvard in 1970. He and his wife, Wendy, have two grown children and four grandchildren.

In February 2010, Paulson published his first book, *On the Brink*, detailing his experience at Treasury during the global financial crisis. In 2011, he founded and currently serves as Chairman of the Paulson Institute at the University of Chicago, which is dedicated to addressing issues of global scope with an initial emphasis on engagements designed to strengthen the crucially important relationship between the United States and China with a special focus on facilitating concrete actions by businesses and governments designed to promote cross border investment, sustainable economic growth, and a cleaner environment around the world.

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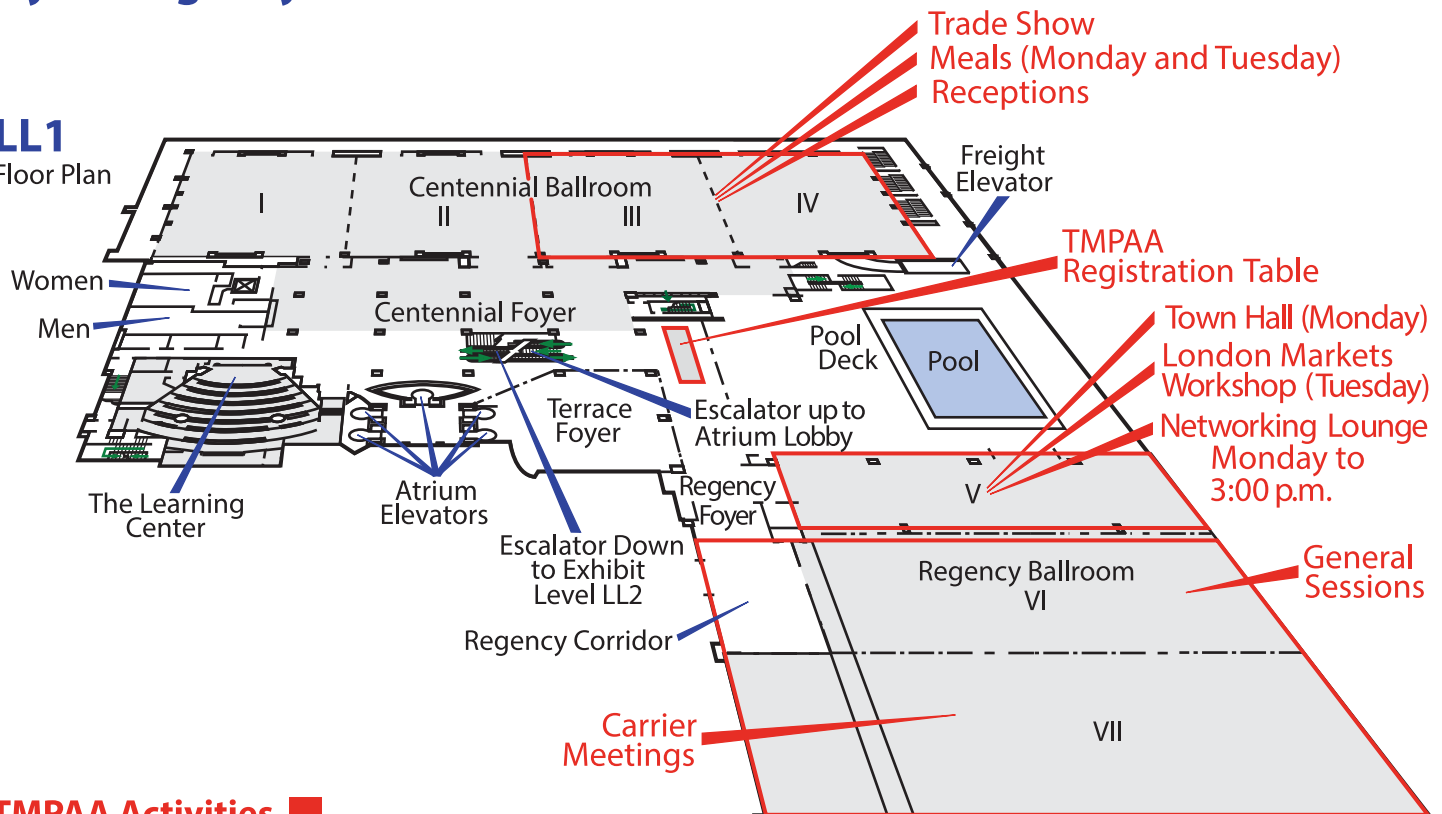
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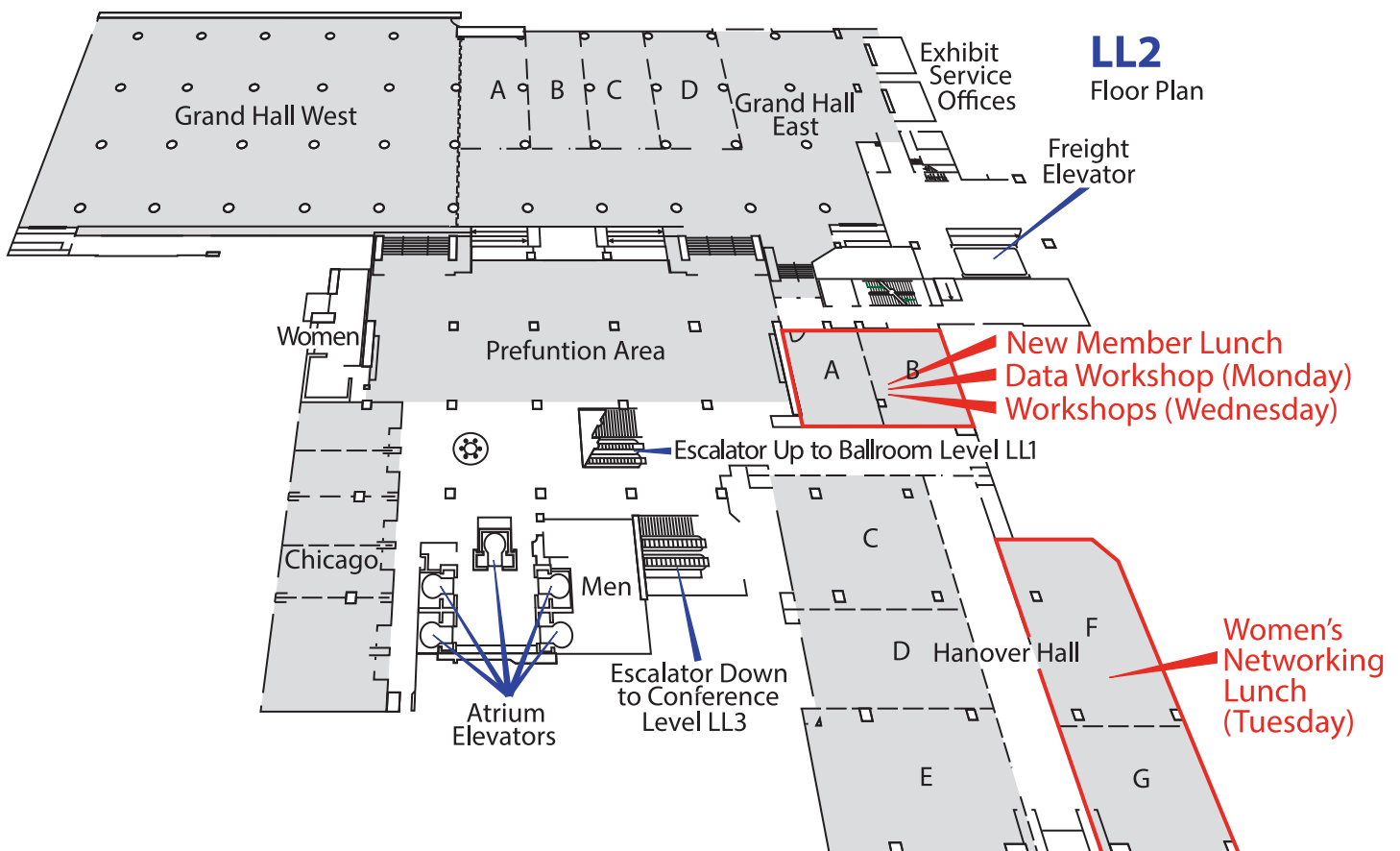
Floor Plan



TMPAA Activities

LL2

Floor Plan



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