



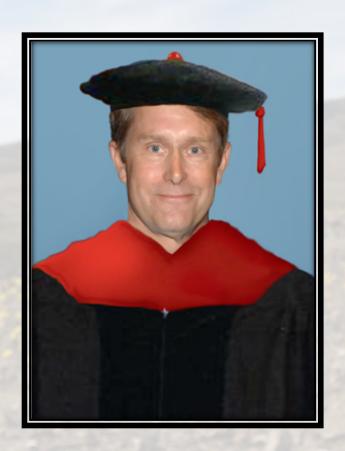
CPL Designation

Requirements to receive the Certified Programs Leader (CPL) Designation:

- Successful completion of all 12 University courses
- 5 years total experience in Insurance
- 2 years experience in a Program Leadership Role
 OR 5 years as a Program Underwriter OR
 5 years as a Vendor in a technical position serving the program business industry
- Absence of any ethical violations



Dean Thompson Challenge



"I will give \$500 for every Program Administrator who completes the CPL process and is eligible to receive the award in 2015."



CPL Recipients

- Kyle Berthold,
 Distinguished Programs
- Melinda R. Bockewitz,
 Scottsdale Insurance
- Joseph Brizuela,
 Liberty International
 Underwriters
- Daniel Czabaj, Glencar
 Underwriting Managers

- John B. Cunningham, Beacon Aviation
- Katherine Damon,
 Distinguished Programs
- David Daniels, NIF Group
- John W. Davis, Willis
- Lorraine Gallagher,
 Distinguished Programs



CPL Recipients

- Melanie Galvan,
 Distinguished Programs
- Donella Held,
 Distinguished Programs
- Rebecca Holt, Clear Risk
- James Kelley, Willis
- Phil Kelling, ARA Ins.
- Angela Matthews, AmRisc, LLC

- Jeff Moran, Keystone Program Group, LLC
- Ethan Nadorlik, ACE
 Commercial Risk Services
- Sandy Ryder,
 Distinguished Programs
- Katherine Vespia,
 Distinguished Programs
- Victoria Webb, Markel





Today's Agenda

10:00 a.m.-12:00 p.m. Workshops

- Rewards and Pitfalls of Private Equity Investment in your Business
- ➤ Thinking Outside the P&C Box Revenue Enhancement with A&H Opportunities
- Profit Sharing Considerations for your Program Carrier Contracts
- Technology Innovations and their Impact on Efficiency and Profitability

12:00 p.m. Networking Lunch





WELCOME



VJ Dowling

Managing Partner

Dowling & Partners Securities LLC

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Dowling Hales



