

15th Annual TMPAA Summit

TARGET  MARKETS

Program Administrators Association

*Unparalleled Resources for
Program Administration*



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

Sponsored by:

Dowling Hales