TARGET MARKETS
Program Administrators Association
3411 Silverside Road, Baynard Building, Suite 100, Wilmington, DE 19810
1-877-347-5700 • www.targetmarkets.com

Welcome to Scottsdale and our 16th Annual Summit!

In October 2001, I attended the inaugural meeting of the Target Markets Program Administrators Association at the Mission Palms in Tempe, AZ. Though our numbers were relatively small that first year, the goal of creating an association that would provide more efficient access to decision-makers in programs was enthusiastically received by those in attendance...and the rest is history! During the last 15 years, the Association has shown consistent and sustained grown and we expect record-breaking attendance at this year's Summit.

Our members often identify leadership development as a key focal point for a successful program operation. The 16th Annual Summit theme, "Excellence and Leadership," addresses this challenge head-on by presenting thought-provoking ideas and concrete examples through workshops and speakers. On Monday afternoon, Coleman Ruiz, former Navy SEAL, will discuss Special Operations Leadership Principles and how they can be effectively applied in the business setting. On Tuesday morning, Peyton Manning will share his own leadership experiences and lessons-learned as he discusses strategies that are relevant to any organization in pursuit of excellence. As always, we have a full slate of excellent workshops and, on Wednesday morning, an opportunity to hear from Sean Kevelighan, new President of the Insurance Information Institute.

As I wind down my two-year term as TMPAA Advisory Board President, I'd like to extend a heartfelt "Thank You" to our outstanding Executive Director, Ray Scotto, and his equally outstanding staff, who have done all the heavy lifting and made me and the rest of the Board look good in the process. I've enjoyed my tenure and I know without a doubt that this role will be filled most capably by Tony Campisi beginning in 2017.

Heidi Strommen
President, ProHost USA
TMPAA President

16th Annual Summit App

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Venue *locate events throughout the meeting by accessing the hotel map*
Documents *Program Carrier Checklist, Executive Summary, White Papers, etc.*
Speak Out *post messages about the Summit with this in-app “chat”*
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TARGET MARKETS
Program Administrators Association

16th Annual Summit

October 17-19 | Scottsdale, AZ

AGENDA

Sunday, October 16

TMPAA Charities Networking Golf Tournament - *sponsored by Rough Notes*

Monday, October 17

8:00 AM	**Registration Opens**
8:00 AM	**Networking Lounge Opens** - *sponsored by Great American*
8:30-10:30 AM	**Continental Breakfast** - *sponsored by Oak Street Funding*
11:00 AM	**Trade Show Opens** - *sponsored by NetRate*
12:00 PM	**Networking Lunch** - *sponsored by American Claims Management*
2:00-3:00 PM	**Workshop: New Capital – New Opportunities, Captive and other ART Options for Programs**
3:30 PM	**Special Operations Leadership Principles** - *sponsored by Zurich*
5:00-6:30 PM	**Welcome Reception** - *sponsored by Hudson Insurance*

Tuesday, October 18

7:00 AM	**Networking Breakfast** - *sponsored by ValueMomentum, Inc.*
8:00 AM	**Networking Lounge & Trade Show Open**
8:30 AM	**General Session: Announcements/Best Practice Awards** ***KEYNOTE SPEAKER*** **Peyton Manning**
10:30 AM	**Lloyd's Open House**
10:30 AM-5:00 PM	**Carrier Networking Lounge Open**
12:00 PM	**Networking Lunch** - *sponsored by W. R. Berkley Insurance Group*
4:00-5:00 PM	**Workshop: Insurance Licensing for Program Managers**
5:00-6:30 PM	**Networking Reception** - *sponsored by EZ Shield*

Wednesday, October 19

7:00 AM	**Networking Breakfast** - *sponsored by MGAERO*
8:00-9:30 AM	**General Session: Announcements/Presentation of CPLs** ***INDUSTRY SPEAKER*** **Sean Kevelighan, President & CEO, I.I.I.**
10:00 AM	**Workshop: Employee Fraud – Risk, Reaction and Protection**
10:00 AM	**Workshop: Taking Control of your Program**
11:00 AM	**Workshop: Capital Options for your Program Operation**
11:00 AM	**Workshop: The Cost of Miscalculation – Pricing, Data, and More**
11:30 AM-12:30 PM	**Box Lunch** - *sponsored by Markel*

Keynote Speaker: **Peyton Manning**

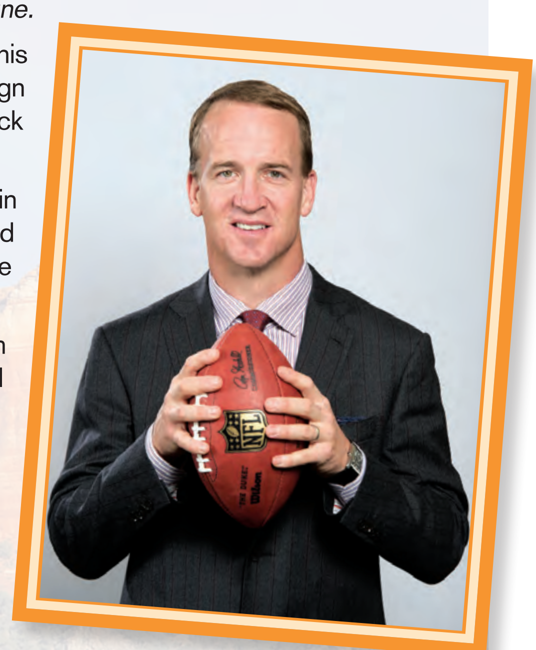
Tuesday, October 18 • 8:30 AM
Kierland Ballroom

Legendary quarterback **Peyton Manning,** the NFL's only five-time Most Valuable Player and a 14-time Pro Bowl selection, has earned his place among the greatest quarterbacks in league history as the active leader in nearly every statistical passing category.

This past season, Manning led the Denver Broncos to a 24-10 win over the Carolina Panthers in Super Bowl 50, making him the first starting quarterback in NFL history to win a Super Bowl with two different teams.

Since entering the NFL in 1998 with the Indianapolis Colts as the first overall draft pick, Manning has thrown the most career touchdown passes in league history in addition to ranking first all-time in wins by a starting quarterback (200), completions and passing yards.

Named a first-team All-Pro selection by the Associated Press on seven occasions, Manning owns more postseason berths and 300-yard passing games than any quarterback in NFL history. A native of New Orleans, he was named the No. 1 greatest athlete to hail from the state of Louisiana by *The Times-Picayune.*



In 2013, Manning was named Sportsman of the Year by *Sports Illustrated.* In his first year with the Broncos in 2012—and after missing the entire 2011 campaign with a neck injury—Manning finished as the *Associated Press* NFL Comeback Player of the Year and runner-up for the league's MVP.

During his first 14 NFL seasons with the Colts, Manning set club records in nearly every career passing category. He led the franchise to its first World Championship in 36 years during the 2006 season, earning MVP honors in the Colts' 29-17 win over the Chicago Bears in Super Bowl XLI.

During his time at the University of Tennessee, Manning epitomized the term "student-athlete." He claimed 43 records at the school, conference and national levels while graduating with Phi Beta Kappa honors.

He led Tennessee to an SEC Championship as a senior in 1997 and earned consensus All-America honors. Following his senior season, Manning was honored with the Sullivan Award for the nation's top amateur athlete based on character, leadership, athletic ability and the ideals of amateurism.

Manning attended Isidore Newman High School in New Orleans, where he was named Gatorade Circle of Champions National Player of the Year and Columbus (Ohio) Touchdown Club National Offensive Player of the Year as a senior.

For his actions off the field, Manning was honored as the recipient of the Byron "Whizzer" White Humanitarian Award and the NFL's Walter Payton Man of the Year in 2005 as well as the Bart Starr Award in 2015.

Manning serves as a member of the American Red Cross National Celebrity Cabinet and The Pat Summit Foundation Advisory Board. He and his wife, Ashley, established the PeyBack Foundation in 1999 to promote the future success of disadvantaged youth by assisting programs that provide leadership and growth opportunities for children at risk.

The PeyBack Foundation has provided more than $10 million of impact to at-risk youth through its grants and programs since its inception.

Manning continues to maintain a strong relationship with St. Vincent's Children's Hospital (Indianapolis), which in 2007 was renamed the "Peyton Manning Children's Hospital at St. Vincent."

Manning's father, Archie, was an All-American at the University of Mississippi in 1969 and 1970 and had a 14-year playing career in the NFL with New Orleans (1971-82), Houston (1982-83) and Minnesota (1983-84). His brother, Eli, also attended Ole Miss and was named the MVP of Super Bowls XLII and XLVI with the New York Giants.

Peyton Williams Manning was born on March 24, 1976, in New Orleans. He and Ashley have twins—a boy and a girl, Marshall Williams and Mosley Thompson.

Industry Speaker: **Sean Kevelighan**

Wednesday, October 19 • 8:00 AM

Kierland Ballroom

Sean Kevelighan joined the Insurance Information Institute as President and Chief Executive Officer in August 2016. Previously, he was Group Head of Public Affairs for Zurich Insurance Group where he oversaw Government and Industry Affairs as well as Corporate Responsibility. He joined Zurich in May 2013 as Head of Government and Industry Affairs for North America, with responsibility for driving the public policy agenda in the region. Prior to that, he worked at Citigroup, Inc., as Head of Strategic Communications for its Global Consumer Banking business, and for Zurich, as Head of Group Media Relations in North America. He has served in various public sector posts in Washington, D.C.

As a political appointee in the administration of President George W. Bush, he served first in the Department of Treasury as a spokesperson for economic issues, and eventually became Senior Advisor for the Office of Tax Policy. He was also the Press Secretary for the White House Office of Management and Budget. Additionally, he worked on Capitol Hill, serving on the staff of members of Congress; most notably as Legislative Director for Representative Bob Schaffer of Colorado. Sean's private sector experience in Washington, D.C. included positions at public affairs firms such as Edelman and Hill & Knowlton. He advised numerous multinational and FORTUNE 100 corporate clients on policy issue management programs, corporate reputation campaigns and crisis communications.

Sean is a graduate of the University of Colorado at Boulder. He and his wife Annik have two children. He is an avid enthusiast of exercise and outdoors, participating regularly in triathlons and other sporting events.

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Knowledge

Agents and brokers can rely on Zurich's decades of specialization in niche markets, its thorough selection of program administrators, deep underwriting knowledge, and claims and risk management experience to help find solutions for their specialty insurance clients.

- Access to a team of more than 150 risk management, underwriting and claims specialists
- Zurich program manager assigned for each program
- Over 60 programs offered across dozens of business segments

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- One of the leading providers in the Program insurance industry
- Insurance provider with an A.M. Best A+ rating*
- Over 50 years continuous presence in programs business

Capabilities

Zurich complements the strengths of its program administrators with capabilities that offer value for both the program administrator and customer. We invest in the development of innovative solutions - like electronic data interchange and predictive analytics - to help improve efficiency and maximize results.

- Strategic marketing team within Programs business unit
- Customer insight research to help identify customer needs
- Customer focused approach to claims service, risk mitigation and product development

Dedication to Programs

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- Dedicated Program business unit
- 13 year average tenure program administrator relationship

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Special Operations Leadership Principles

Monday, October 17 • 3:30 PM

Trailblazer C

Attaining functional excellence utilizing proven tactics, techniques and procedures is equally important for your business as it is in special operations military training. This presentation will be delivered by **retired Navy SEAL Coleman Ruiz,** who has applied these principles in his own successful business ventures and trained other companies to do the same.

Attendees can expect to hear how every great team must exhibit the following qualities:

- Constantly seek and manifest functional excellence
- Develop and maintain physical and mental toughness
- Develop and advance team dynamics and core leadership
- Understand and develop a Warrior Mindset

Coleman Ruiz

Coleman serves as a Managing Member at Anchor Management, LLC a special asset investment group in Annapolis, MD.

Previously, as an operating partner with Anchor Management, Coleman served as the President/CEO of Immediate Response Technologies, a manufacturer of life safety equipment. He guided the turn-around, stabilization, and eventual sale of the company. Before joining Anchor Management, he served as a senior manager at CrossLead, a niche operations analysis consulting firm.

Coleman is a U.S. Naval Academy graduate and former U.S. Naval Officer in the Naval Special Warfare community (U.S. Navy SEALs). He spent 13 years on active duty in the U.S. Navy ultimately serving overseas during six operational combat deployments in both the Afghanistan and Iraq theaters of war. He's served as troop commander, joint task force commander, and executive officer. While serving in Navy's special mission unit, Naval Special Warfare Development Group (NSWDG) in Virginia Beach, he led hundreds of operations and sensitive military programs. Coleman also served in U.S. Embassies in both Yemen and Kenya working directly with the Ambassador's country team and the host nation.

While in special operations, Coleman also served as a Training Officer at both the basic and advanced Naval Special Warfare (SEAL) training schools. He led the training and development of approximately 800 basic and advanced special operations students through the military's most high-risk training programs, including the infamous Hell Week in BUD/S training.

Since completing active duty service in 2011, Coleman has also served as the Executive Director of Carry The Load in Dallas, TX, a 501(c)3, as a board member at Tip of the Spear, a veteran-focused non-profit, and member of the Station Foundation's veteran transition programs.

Coleman has served as an informal advisor to numerous collegiate and professional athletic teams and participates with a community of professionals and practitioners in an ongoing research project called Mission Critical Teams at the University of Pennsylvania.

Coleman graduated from the U.S. Naval Academy with a B.S. in Mathematics and earned an MBA in Finance at the Government School of Business & Public Policy from the Naval Postgraduate School in Monterey, CA. He lives in Annapolis, MD with his wife Bridget Ruiz and their three children, Coleman (age 13), Ben (age 10), and Oliver (age 7).

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ZURICH®

Lloyd's Open House

Tuesday, October 18 • 10:30 AM – Noon

Trailblazer B

Lloyd's Open House is scheduled to follow the General Session featuring Peyton Manning.

- Representatives from 12 Lloyd's Syndicates
- Market finding assistance for all types of programs including small and start up programs
- Information about the London Marketplace and becoming a coverholder

Representatives from Lloyd's America and Tysers will be present to support your inquiries.

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Connect with all 60 TMPAA Program Carriers

Carrier Networking Lounge – Trailblazer C, D, & E

10:30 AM – 5:00 PM

Monday, October 17

New Capital – New Opportunities, Captive and other ART options for Programs

2:00 PM – Trailblazer E

Rick Stasi – York Risk Services (Moderator)

Chris Kramer – Caitlin Morgan Captive Services

Dawnmarie Black – BMS Re US

Brian First – Arch Insurance

Scott Reynolds – Member Insurance

Captives and other Alternative Risk options may not be well understood in the insurance industry, but current marketplace conditions present a compelling reason for program administrators to consider these options.

This workshop is designed to provide attendees an overview of captive program structures and the opportunities for program administrators in the Alternative Risk marketplace. Attendees can expect to hear a panel of experts representing carriers, reinsurance brokers, and program administrators discuss the following areas to help rethink your current program business operation.

- Brief overview of Agency, Association and Member-Owned captive programs
- Why a program administrator would want to form a captive program
- Expanding current programs through a captive
- Development of new programs when traditional marketplace is not a good fit
- Partnering with carriers, reinsurers and service providers to develop captive programs
- Benefits and barriers of forming captive programs

Tuesday, October 18

Insurance Licensing for Program Managers

4:00 PM – Trailblazer B

Barb Donnar – Supportive Insurance Services

As a program administrator with a national insurance scope, your agents and agencies need to be licensed in every state where you will be writing business. The process of obtaining and maintaining insurance licensing in all 51 jurisdictions can be overwhelming and create long term headaches. This workshop will address topics such as who needs to be licensed, agency/corporate licensing, and licensing terminology.

You will also learn what to look for as you research each states' websites regarding licensing requirements and whom you should consult regarding whether or not you need to file for Certificates of Authority with the various states.

The challenges of licensing do not stop when the licenses are issued. We will discuss ongoing licensing maintenance, when licenses renew and determining if continuing education requirements have been met. We will also discuss how to be certain you are in good standing with the various secretary of state offices.

All in all, this workshop will help you navigate the intricacies of licensing and provide you with a research plan customized for your business.

Wednesday, October 19

Employee Fraud – Risk, Reaction and Protection

10:00 AM – Trailblazer A

William J. Kelly – Wilson Elser

Certified Fraud Examiners report that, on average, organizations lose 5% of annual revenues due to employee fraud. While most industries are cash poor, insurance agencies tend to be cash rich relative to their size as they are holding cash float that they owe insurance companies, and thus targets for sizable embezzlements. Frauds that are uncovered rarely lead to total recompense to the organization from the unfaithful employee. Sending a perpetrator to jail does not return the money stolen.

In the current business environment, there are key indicators of employee fraud and traditional fraud prevention strategies may no longer be as effective as they once were. The workshop is designed to provide participants with a working knowledge of employee fraud so that they may employ effective risk management.

Using actual examples of employee fraud, this workshop will examine:

- Situations that give rise to employee fraud
- Employee fraud warning signs
- Proper and effective reactions to suspected fraud
- Means to minimize the risk associated with employee fraud
- Insurance coverage to protect your operation

Taking Control of your Program

10:00 AM – Trailblazer B

Derek Jones – Milliman

Dave Daniels – NIF

Mitchell Luedtke – Glencar

According to the TMPAA State of Program Business study, program administrators and insurers agree that underwriting profitability is what matters most when establishing a successful program. Today, more than ever before, data and technology are available to be able to accurately measure underwriting profitability. More and more, program administrators are taking responsibility for understanding and measuring the profitability of their programs by performing their own analysis of underwriting profitability. In this session, a program administrator, their outside actuary and insurance company representatives will discuss the many benefits to program administrators of performing their own analysis of program profitability and how to take action on the results.

Capital Options for your Program Operation

11:00 AM – Trailblazer A

Kevin Donoghue – Mystic Capital (Moderator)

Kelly Drouillard – Live Oak Bank

Brian Henson – Oak Street Funding

Marc Cole – SuperG Funding

Capital sources vary at different stages of the business life cycle. Join this panel discussion to learn why financing options differ in length of loan, pricing, and structure depending on the current position of your business. Learn the important factors to understand at your operations Early, Growth, Maturity, and Renewal stages. Capital availability and characteristics for each of these life cycle stages will be discussed. Finally, you will hear from three lenders with unique approaches to insurance agency financing.

The Cost of Miscalculation – Pricing, Data, and More

11:00 AM – Trailblazer B

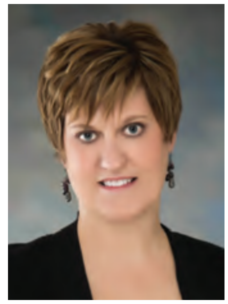
Peter de Freitas – Verisk Insurance Solutions

Maximizing the profitability of your book of business is a challenging task in today's economic environment. Whether avoiding premium leakage, minimizing the effect of inadequately priced exposures, or verifying the quality of information from agents, you have a lot to track day to day. The cost of miscalculation can have a severe impact on those results.

In this workshop we will address key property and casualty industry results and relate them to the key challenges faced by carriers. Together, we will explore the issue of increasing profitability despite low investment yields and modest price increases, how we can gain insight from data and how to identify new venues for growth. We will look at broad areas where data classification and underwriting quality can have a significant impact including exposure assessment, rate adequacy, reinsurance, operations, claims administration and regulatory compliance.

Brian Henson
Oak Street Funding

As Oak Street Funding's Director of Underwriting for Strategic Markets, Brian Henson specializes in underwriting and structuring large loan transactions. Since 2012, Brian and his team have analyzed and funded more than $249MM in loans to the insurance industry with a specific focus on Wholesalers, MGAs and Program Administrators. Brian has worked in commercial lending since 2002 and has held positions in credit, sales and portfolio management for several Midwestern banks. Prior to joining Oak Street, he managed a $200MM national real estate loan portfolio. Brian has a Bachelor of Science in Management from Purdue University.



Barb Donnar
Supportive Insurance Services

Barb Donnar is owner and President & CEO of Supportive Insurance Services—a national provider of licensing and maintenance services to insurance agencies, adjusting firms and insurance companies. She founded the firm in 2001. Barb has over 34 years experience in the insurance industry including 18 years with an A-rated life and health insurer, managing licensing and commissions for over 100,000 producers and agencies. She was responsible for automation of the licensing process, redesigning commission & bonus programs and appointment processing. Barb has extensive experience with market conduct examinations. She is a charter member of the Securities and Insurance Licensing Association (SILA) and a former advisory board member.

William Kelly
Wilson Elser

Bill Kelly focuses his practice on financial professionals, providing comprehensive legal services in connection with risk management, government investigations, commercial negotiations, and partnership and practice issues. He has experience with all types of claims brought against accounting firms as well as financial planners, investment advisers, broker-dealers and registered representatives. Bill counsels and defends his clients in state, FINRA and SEC regulatory and enforcement actions. In his years representing financial professionals and fiduciaries, Bill has investigated and litigated many cases involving employee dishonesty and fraud, both in an insurance context and as hired by employers. Bill graduated from St. John's University School of Law, J.D., Binghamton University.

Marc Cole
Super G Funding

Marc is CFO of Super G Funding and member of its Loan Committee. Since 1999, Marc has been making equity investments and lending to emerging growth companies. His experience spans from start-ups to leveraged buyouts and includes both public and private company investing. Marc is a generalist investor and executive with experience in business service companies, specialty lenders, software developers and consumer products and retail. At Super G, Marc structures transactions and oversees capital structure, finance and legal matters. He also serves as Executive Chairman of Bluefin Payment Systems, named one America's Ten Fastest Growing Private Companies by Inc. 500 for 2012. Marc is a graduate of the Pennsylvania State University, Magna Cum Laude.

Kelly Drouillard
Live Oak Bank

Kelly Drouillard joined Live Oak Bank with more than 25 years in development, operations, and finance within the insurance industry. The past 10 years have been devoted to senior debt lending to agencies, program administrators, and various insurance distribution entities. Most recently, Kelly was a Vice President of Strategic Markets at a leading insurance lending institution. Her career began at KPMG and also included tenure with Dodson Group, GE Insurance Solutions (Employers Re), Brooke Capital Advisors, and she was a co-founder of Quivira Capital. Kelly is a graduate of Kansas State University and is an active angel investor in industries beyond insurance.

Rick Stasi
York Alternative Risk Solutions

Rick is responsible for overall operations of Alternative Risk Programs such as Individual, Group, or Agency Captives, as well as Self Insured and Risk Retention Groups. He oversees the administration, marketing, and risk management services associated with these programs. Rick also manages York's wholly owned Rent-A-Captive subsidiary, Atlantic Gateway International Ltd., located in Bermuda.

Rick joined York in 1998 after holding management positions at CNA and Powell-Walton-Milward. Rick has over 39 years of commercial insurance experience and a strong background of alternative risk program business. Rick serves as a director on several captive boards, is a frequent guest speaker at industry conventions and has authored numerous articles on risk management, insurance and alternative risk financing. He holds a Bachelor of Science degree in Business Administration and Occupational Safety from Illinois State University.

David Daniels
NIF Group, Inc

David is the President and Chief Operating Officer of NIF Insurance Services of California, part of NIF Group, Inc. NIF California is a Program Administrator specializing in construction and bowling center insurance programs. David has over 30 years of program administrator and insurance company experience, and last year he received his CPL designation from Target Markets. David was President and part owner of HDR Insurance Services, which was acquired by NIF Group in 2009. Prior to creating HDR, David was Senior Vice President and Manager of American Eagle Insurance Company's P&C division. David also held various underwriting, marketing, and agency management & contract positions with The Maryland Insurance Group and Zurich-American. He began his insurance career as an Underwriter with Crum & Forster. David is a graduate from University of the Pacific where he earned a full swimming scholarship and majored in Finance and Marketing.

Derek Jones
Milliman

Derek is a Principal and Consulting Actuary in Milliman's New York office. His experience includes financial modeling, loss reserving, pricing, and reinsurance for a wide range of commercial insurance exposures. Derek works with insurers and reinsurers, program administrators, brokers, corporate clients and other self-insurers. He has a degree in economics from the University of Virginia. Derek is a Fellow of the Casualty Actuarial Society and a regular speaker at actuarial and other educational seminars, and he is also one of the subject matter experts for Target University's actuarial course.

Mitchell Luedtke
Glencar Underwriting Managers

Mitch has over 30 years of P&C insurance experience encompassing primary Commercial Lines, Reinsurance, and Program Management business. He has held multiple industry senior management and leadership roles, including executive oversight of program business operations up to $300 million in GWP. As one of the founders of Glencar, he has led the organization initially as Chief Underwriting Officer then as President. In 2016, Mitch added the responsibilities of Chief Executive Officer. He has also served as a Director of Glencar since inception.

Mitch is a graduate of the University of Wisconsin – Madison with a specialization in Risk Management and Insurance. Prior carrier experience includes QBE, Praetorian Insurance Company, Insurance Corporation of Hannover, Employers Reinsurance Corporation, Wausau Insurance Companies, and Northwestern National Insurance Company.

Brian First
Arch Insurance Company

Brian First has executive responsibility for Arch Insurance Company's Alternative Markets and Programs business units. He has successfully guided many new clients through the program implementation and captive formation process. He has particular expertise in national and regional commercial insurance programs, Cayman and Bermuda-domiciled group captives, sponsored captives, rent-a-captives, and cell captive structures. Brian has authored numerous specialty program and alternative risk articles for industry periodicals and is a regular presenter and panelist at industry conferences. His 25 years of professional experience includes executive management, underwriting and marketing positions at national insurance companies where he developed and managed both alternative risk and specialty programs. He is a graduate of Miami University with a B.A. in Economics.

Peter de Freitas
Verisk Insurance Solutions

Peter de Freitas is a highly accomplished executive with more than 30 years of strategic experience in underwriting, insurance administration, audit and governance, risk engineering, and property operations. Prior to joining Verisk, he held senior management positions at Zurich American Insurance Company, CNA, Axis Specialty Insurance and ProSight Specialty Insurance, as well as Kemper Insurance Group and CIGNA Worldwide.

Some specific areas of expertise include portfolio management, technical underwriting and rate development, start-up operations, re-vitalizing profit centers and strategic business units, aligning core competencies with future state strategic vision, and working with the entire insurance distribution chain including retail and wholesale producers, MGAs, program administrators, and third party suppliers.

Christopher Kramer

Caitlin Morgan Captive Services

Chris leads the firm's initiatives in developing captive solutions for policyholders, agency owners and affinity programs. Chris's career spans over 30 years in the Property, Casualty, and Alternative Risk Financing industry and been credited with the creation of a number of captives, risk retention groups and start up profit centers for private and public enterprises, including many involving insurance agencies with a specialty program or an affinity. He has served as both officer and director for many domestic and international captive insurance organizations, including Barbados, where he lead the start up efforts to create a captive management firm and Segregated Cell Company (SCC), currently the largest in Barbados. Chris obtained his undergraduate degree from Bowling Green State University where he majored in Insurance and Risk Management and his MBA from Case Western Reserve University.

Dawnmarie Black

BMS Re US

Dawnmarie Black joined BMS Risk Solutions Ltd., in April 2014 as Senior Vice President. In this capacity she partners with BMS Re US to assist brokers in the development of new facultative ideas and solutions for reinsurance clients. She also supports the development of program and MGA opportunities in this sector of the market. Dawnmarie brings to BMS more than 24 years of experience within multiple segments of the insurance industry. She is an accomplished leader/producer with extensive broking and underwriting background. Dawnmarie began her career as a trainee in the energy division of Chubb Insurance before she moved into the International Division of Lexington Insurance. Dawnmarie then transitioned into global facultative reinsurance, where she spent the next 11 years focused on property facultative reinsurance within the broking sector. Prior to joining BMS she served at the Ascot Syndicate where she had the opportunity to sharpen her underwriting skills as well as help to drive growth within the U.S. in the MGA space.

Scott Reynolds

Member Insurance Agency, Inc.

Scott is the President & CEO of Member Insurance Agency, Inc. Scott's responsibilities include developing and directing the implementation of strategic plans, which will, in turn, assure the long-term health and profitability of Member Insurance. He brings over 29 years of insurance industry experience in numerous senior level roles. In 2008, Scott became President of United National Group, an insurance company focused on specialty insurance programs. Prior to United National, Scott served as President of the Specialty Underwriting Division of AmWINS Group, Inc., where he oversaw their program business from 2006 to 2008. Scott also served as AmWINS Chief Actuary from 2002 to 2006. Prior to AmWINS, Scott was at Royal & SunAlliance USA where he managed the finance and actuarial departments. In 1987, Scott graduated from Appalachian State University with a degree in Statistics.

Kevin Donoghue

Mystic Capital

Kevin has spent 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).

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Agents can search TargetPrograms.com free of charge. Program administrator members of the TMPAA pay a basic enrollment fee of $2,500/year which includes all of the above features or members can select from the following package options:

- Target Programs with 3-ad package: $5,200
- Target Programs with 6-ad package: $7,500
- Target Programs with 12-ad package: $11,800

CONTACT

Sarah Ayars (302) 268-1011
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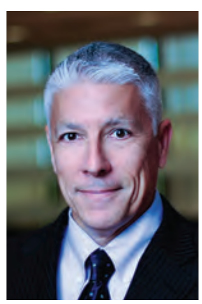

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TARGET MARKETS

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.

TARGET UNIVERSITY

Program Business Education

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 meeting.


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2016 MID-YEAR CPL RECIPIENTS

The TMPAA awarded two of its members the Certified Programs Leader (CPL) Designation during the 2016 Mid-Year Meeting in Arlington, VA. Recipients included ***Renée McFadden, Distinguished Programs*** *(pictured on left with TMPAA President, Heidi Strommen) and* ***Robin Pisecki, Willis Programs.***

ST. JOHN'S UNIVERSITY'S SCHOOL OF RISK MANAGEMENT PARTNERSHIP

ST. JOHN'S UNIVERSITY

Target Markets has announced a collaboration between Target University and the Center for Professional Education (CPE), an affiliate of St. John's School of Risk Management (SRM). CPE now provides access to Target University's suite of 12 online, self-study courses on Program Administration and likewise, St. John's has granted Target Markets' members access to CPE courses.

Target Markets' members receive a **10% discount** on all courses accessible in the Online Learning Portal of the Center for Professional Education, School of Risk Management. A link to access the portal and discount code is available on the Target Markets' website *(click the St. John's logo on the Target University page).*

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TMPAA Charities

SJU Saint Joseph's University

Academy of Risk Management and Insurance

This year the Association will be fundraising to support two student scholarships at St. Joseph's Academy of Risk Management and Insurance. The St. Joseph's program has shown great growth and development over the past several years and we would like to support their efforts to help bring new talent into our field.

Make a pledge of support at the ***Packages from Home*** table during the Summit.

packages from HOME SUPPORTING OUR TROOPS

"Packages from Home" Initiative

Your contributions continue to support the ***Packages from Home*** initiative, providing care packages and letters to our active duty men and women serving abroad. Take a few minutes during the meeting to participate in this effort. Look for the ***Packages from Home*** table outside the Trade Show!

Recent Individual Contributions

Peter Anderson, Anderson Musical Instrument Insurance Solutions

Laura Beckmann, AmRisc

John Cunningham, Beacon Aviation

Ira Dawer, Synergy

Aaron DiCaprio, triBlue Insurance Solutions

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Kevin Flack, Atrium Underwriters

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2017 Mid-Year Meeting

May 15-17, 2017
Crystal Gateway Marriott • Arlington, VA

Keynote Speaker:

Malcolm Gladwell

Journalist and Author

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— Malcolm Gladwell

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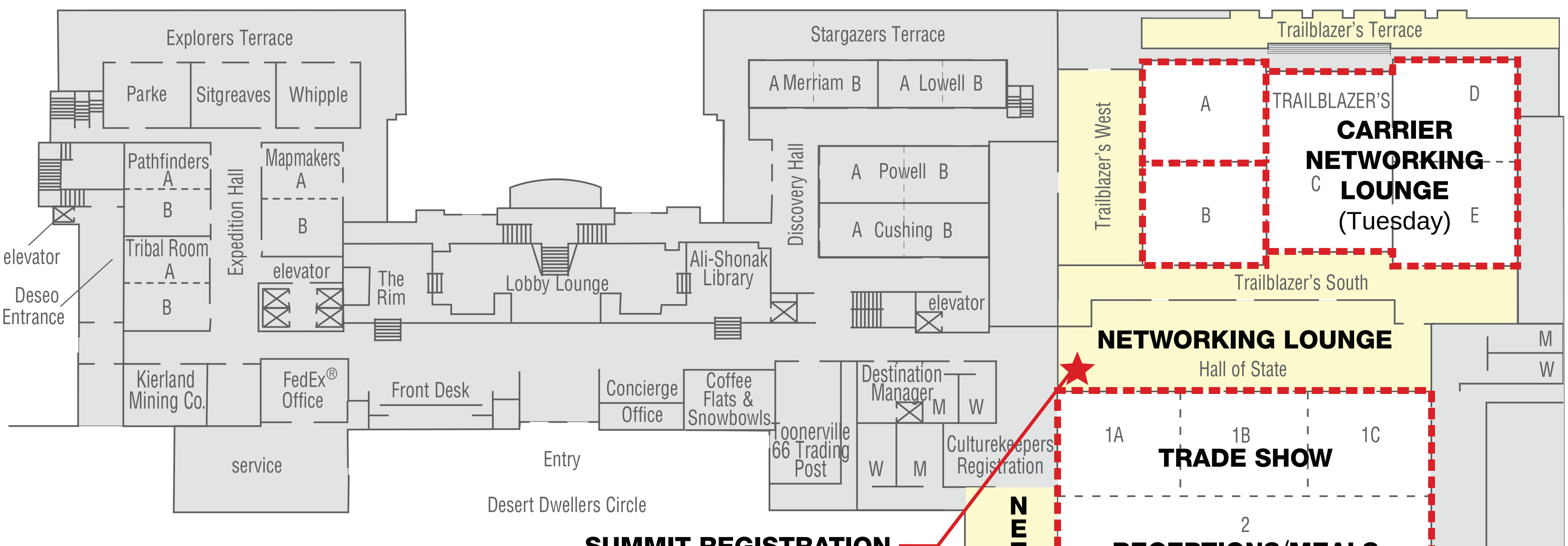

MONDAY

Trailblazer D & E - Additional Networking Tables

Trailblazer B - Workshop, 2:00 pm

Trailblazer C - Special Operations Presentation, 3:30 pm

TUESDAY

Trailblazer B - Lloyd's Open House, 10:30 am

- Workshop, 4:00 pm

WEDNESDAY

Trailblazer A & B - Workshops, 10:00 & 11:00 am