CONTENTS

2017 TMPAA Mid-Year Meeting Program Book

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Target Markets
Program Administrators Association
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Welcome to Arlington and our 2017 Mid-Year Meeting!

As a famous novelist once wrote, "It was the best of times, it was the worst of times, it was the age of wisdom, it was the age of foolishness, it was the epoch of belief, it was the epoch of incredulity, it was the season of light, it was the season of darkness, it was the spring of hope, it was the winter of despair, we had everything before us, we had nothing before us, we were all going direct to Heaven, we were all going direct the other way."

While this may be the opening paragraph of the famous Charles Dickens novel, A Tale of Two Cities, one might think the 19th century novelist was actually writing about the insurance industry in the 21st century! It's hard to imagine a more interesting and dynamic time to be in the insurance business. The market forces driving the increasing pace of change in our business continue to create opportunities to find new and better ways to help our customers manage risk. And what better way to meet those needs than being in program business!

For 16 years, Target Markets has been helping program administrators manage the risks and challenges of our business by providing unparalleled networking opportunities, introduction and access to program markets and industry vendors, marketing services, opportunities for recognition and professional growth through the Best Practices Designation and Target University, conference workshops and town hall meetings focused on the day-to-day management of your program business, exposure to keynote speakers that provide insightful perspectives about the world around us and much, much more.

Our 2017 Mid-Year Meeting continues the Target Markets tradition of providing a valuable experience for you, our members. Starting with our Keynote Speaker, Malcolm Gladwell, the English-born Canadian journalist, author and speaker who is well known for his introspective writings on how we think and act, to our 2 ½ days of networking opportunities, seven workshops and panels, trade show and evening receptions, this year's conference will be another opportunity to learn and grow, both personally and professionally.

On behalf of the TMPAA Advisory Board and Staff, welcome to our Mid-Year Meeting. If we can be of any assistance in helping you to maximize the value of your participation as a member of TMPAA, I encourage you to let us know.

Best wishes for a productive conference!

Regards,

Tony Campisi

Tony Campisi, TMPAA Advisory Board President
President/CEO, Glatfelter Insurance Group

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Features

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Agenda *plan your meeting by adding events to "My Schedule"*

Attendees *view contact details and correspond with other members in seconds*

Carrier Search *full access to the CSP, no additional sign in required*

Vendors *view by category and save profiles to the "My Vendors" folder*

Sponsors *check out the Gold, Silver and Bronze level supporters*

Speakers *get familiar with all the meeting presenters*

Tradeshow Map *see where you can meet exhibiting vendors*

Surveys *let us know what you think of our programming - respond after each session*

Info Booth *wifi details, local area/dining info, TMPAA staff and more*

Venue *locate events throughout the meeting by accessing the hotel map*

Documents *Program Carrier Checklist, Executive Summary, White Papers, etc.*

Twitter *use this in-app option to follow and post #2017MidYear updates on Twitter*

Mobile App Sponsored by: Munich RE

Target Markets Program Administrators Association

2017 Mid-Year Meeting

May 15-17 | Arlington, VA

AGENDA

Monday, May 15	
8:00 AM	**Registration Opens**
8:00 AM	**Networking Lounge Opens** - *sponsored by Great American Insurance*
8:30 AM	**Continental Breakfast** - *sponsored by Old Republic Specialty Underwriters*
11:00 AM	**Trade Show Opens** - *sponsored by NetRate Systems*
12:00 PM	**Networking Lunch** - *sponsored by ValueMomentum, Inc.*
2:30-3:30 PM	**Workshop: Leading Multigenerational Teams in Organizations** *- sponsored by Zurich*
4:00-5:00 PM	**PA Town Hall: Lessons Learned II** - *sponsored by Rough Notes*
5:00-6:30 PM	**Welcome Reception** - *sponsored by Hudson Insurance*

Tuesday, May 16	
7:00 AM	**Networking Breakfast** - *sponsored by Johns Eastern*
8:00 AM	**Networking Lounge & Trade Show Open**
8:30 AM	**General Session: Announcements/Best Practice Awards** ***KEYNOTE SPEAKER*** **Malcolm Gladwell** *- sponsored by Wilson Elser & York Programs*
10:30 AM-12:00 PM	**Workshop: Leveraging LinkedIn for Business Development** *- sponsored by Vertibrands Marketing*
10:30 AM-5:00 PM	**Carrier Networking Lounge Open** - *sponsored by AmTrust Underwriters*
11:45 AM	**Women's Networking Lunch** - *sponsored by Allianz*
12:00 PM	**Networking Lunch** - *sponsored by Insure Learn*
3:30-5:00 PM	**Captive Open House**
5:00-6:30 PM	**Networking Reception** - *sponsored by Tysers*

Wednesday, May 17	
7:00 AM	**Networking Breakfast** - *sponsored by AS&G Claims Administration, Inc.*
8:00-9:30 AM	**General Session: Announcements/Presentation of CPLs** ***CYBER PANEL*** **Assessing Cyber Coverage in Program Business**
10:00-11:00 AM	**Workshop: 9 Elements for Transitioning your Program to a New Market**
10:00-11:00 AM	**Workshop: Selecting the Right Technology Partner**
11:00 AM-12:00 PM	**Workshop: Add Video to Your Marketing… How to Get Started**
12:00 PM	**Networking Lunch** - *sponsored by MGAERO, LLC*

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2017 TMPAA Mid-Year Meeting

Big Challenges Niche Solutions

Keynote Speaker:

Malcolm Gladwell

Malcom Gladwell is the author of five *New York Times* bestsellers — *The Tipping Point, Blink, Outliers, What the Dog Saw,* and now, his latest, *David and Goliath: Underdogs, Misfits and the Art of Battling Giants.* He has been named one of the 100 most influential people by *TIME* magazine and one of the *Foreign Policy's* Top Global Thinkers.

He has explored how ideas spread in *The Tipping Point*, decision making in *Blink*, and the roots of success in *Outliers.* With his latest book, *David and Goliath*, he examines our understanding of the advantages of disadvantages, arguing that we have underestimated the value of adversity and over-estimated the value of privilege.

Malcolm's next book was actually a 10-part podcast titled *Revisionist History.* In the weekly podcast, Malcolm re-examined an overlooked or misunderstood aspect of past events.

He has been a staff writer for *The New Yorker* since 1996. He has won a national magazine award and been honored by the American Psychological Society and the American Sociological Society. He was previously a reporter for *The Washington Post.*

CREDENTIALS

- **Staff writer for *The New Yorker***
- **Author, *The Tipping Point, Blink, Outliers, What the Dog Saw* and *David and Goliath***
- **Member of the Order of Canada**
- **Honorary doctorate of letters, University of Toronto**
- **Former science and medicine writer for *The Washington Post***
- **Winner, National Magazine Award**

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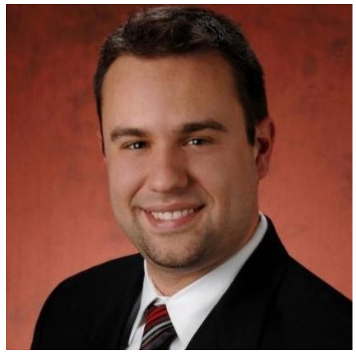
Assessing Cyber Coverage in Program Business

Wednesday, May 17 | 8:00 AM GENERAL SESSION | Grand Ballroom

John Weber
Sr. Associate Editor, AM Best
(Moderator)



Patrick Thielen
Senior Vice President,
Financial Lines, Chubb

Erica Davis
Senior Vice President,
Head of Specialty Products E&O,
Zurich North America

James Eaton
Specialty Lines,
Beazley

John Solari
Chief Underwriting Officer,
Glatfelter Programs

Gregory J. Bautista
Attorney at Law,
Wilson Elser

Cybersecurity continues to dominate headlines with new breaches being discovered in a wide variety of businesses. Correctly identifying the cyber risks in a book of business and offering adequate coverage to mitigate potential losses has become a growing challenge for program administrators. The TMPAA Cyber Panel composed of three leading cyber markets, a cyber legal expert and a program administrator will address the overall state of cyber coverage, the market's appetite for providing this coverage, policy form differences, emerging cyber threats, and the following topics:

- What are PAs doing to provide this coverage on their programs?
- How does a PA address the risk for themselves and their client base?
- Approaches to sell this coverage / challenges to marketing
- Current client uptake on this offered coverage
- Risk of market aggregation for these policies
- Significant losses and how they were adjudicated

Attend this presentation to educate yourself on this rapidly changing coverage and begin to identify the best solution to protect your insureds against their specific cyber exposures.

Monday, May 15

Leading Multigenerational Teams in Organizations

2:30 PM – Salon B

Coleman Ruiz, Retired Navy SEAL

A popular concept in media and management training is that young employees today are different, more entitled, less motivated, communicate differently, operate with different expectations, and have a different work ethic than you expect. This workshop will challenge that notion and demonstrate that it's us, the parents, teachers, administrators, coaches, and bosses that are different today. We assume these differences exist and handicap ourselves by stereotyping an entire demographic of future leaders.

In a follow up to his TMPAA Summit leadership presentation, Coleman Ruiz, retired Navy SEAL Commander and Instructor, will explain his position that the leader, parent, coach, teacher, administrator and boss that fails to lead bravely and effectively is stealing from their team–stealing opportunity, stealing development, and stealing someone's chance to improve. Attendees can expect to leave this workshop with information about what your teams really need from you and how to develop great followers who take responsibility, challenge, participate in transformation and take action.

The basis for this workshop was formed as a result of Mr. Ruiz's following experiences:

- SEAL Instructor in 2005/2006 and again in 2008, training guys straight out of high school or college
- Spending time in the service where every year, as your team progresses, you assimilate new people ("rookies") into a troop/platoon
- Training young athletes at all college levels
- Business experiences assimilating and leading multigenerational teams
- Serving as a lecturer and writer for a course on Mission Critical Teams at the University of Pennsylvania, McNulty Leadership Program at the Wharton School
- Ongoing work with midshipmen at the U.S. Naval Academy
- Independent research on teams for the Wharton People Analytics department

Tuesday, May 16

Leveraging LinkedIn for Business Development

10:30 AM – Salon D & E

Brynne Tillman, PeopleLinx

The buyer's journey has changed. Buyers are now researchers, explorers, self-educators and collaborative decision makers–and it's significantly impacting the traditional sales process. The *Know, Like and Trust* mantra is now *Attract, Teach and Engage.* If you are not breaking through the noise, gaining access to stakeholders and positioning yourself as a thought leader and subject matter expert, your competition will. In this session you will learn to:

- Develop a profile that attracts, teaches and engages your targeted audience
- Engage with those that views your profile
- Find targeted prospects and candidates
- Leverage your network for warm introductions
- Connect with purpose
- Schedule calls with new and existing connections
- Share content that piques candidates and buyers curiosity

Captive Open House

3:30 PM – Salon D & E

Following the popular presentation at our fall meeting, we are providing a different opportunity to learn more about captives and the opportunities they offer for your program business. Representatives from the Association will be available to answer your questions, including:

- Program Administrators who have developed captives for their business
- Carriers who offer a variety of captive alternatives options
- Companies who offer captive management and consulting services

The open house is designed to accommodate the attendee looking for some first time information as well as those who already have captive experience.

10 Reasons to Consider a Captive for your Agency's Business

1. Enhanced agency perpetuation strategies using profits from agency captive
2. Alignment of interest with the fronting carrier

3. Can be comparably better than current incentive plan(s)
4. Leverage agency underwriting expertise into additional profits
5. More control over program structure and service providers
6. Incentives through profit sharing
7. Multi line or monoline programs
8. More influence with fronting/policy issuing carrier
9. Opportunity to create revenue from using agency ancillary services
10. Enhanced tax benefits

Wednesday, May 17

Nine Essential Elements for Transitioning your Program to a New Market

10:00 AM – Salon G

Helen English, Distinguished Programs
Paul Mihulka, Zurich
Holly Jurek, York Programs

Your market search was successful and you have found your next program carrier partner. Now what?

This workshop explores the factors that will make your carrier transition seamless for your staff, producers and end buyer.

Our panel of experts will share their experience with this topic and cover the following:

1. Developing a Strategic Plan
2. Focusing on the Customer
3. Transparency
4. Trust, but Verify
5. Addressing Cultural Differences in your Organizations
6. Devoting Adequate Resources (like it was a merger)
7. Details Demand Flexibility
8. Effective and Frequent Communication
9. Remember: What would Jimmy Buffett do?

Attendees can expect to leave with a checklist as a resource for future market changes.

Selecting the Right Technology Partner

10:00 AM – Salon D

Moderator:
Wayne Umland, Wayne Umland Consulting
John Przedpelski, Willis Programs
Craig Rappaport, AIX
Art Seifert, Glatfelter Insurance Group

In this world of high tech solutions and enhancements, and with changes happening so quickly throughout our industry, there are solution providers who promise the world. How do you select the right vendor for your business? Come and understand what you need to do and prepare before you even talk with the first (of many) solution partners. Is it the strength or their technology, the best cultural fit, or a combination of both that will drive your decision? How do you make sure you choose the right partner who will deliver the right solution for you now and assist you after the solution in implemented? In this workshop, come and listen to those who have lived through this process and hear about some of the pitfalls and successes. Learn some tips to find that perfect partner. You'll leave with an understanding that might surprise you and a checklist to assist in the process of making that decision.

Add Video to Your Marketing…How to Get Started

11:00 AM – Salon D

John Peck, Glatfelter Insurance Group
Taryn Kuhn, Glatfelter Insurance Group

Lights, Camera, Action: 2017 is the year for video. The statistics don't lie – four times as many consumers would prefer to watch a video about a product than to read about it. Using the word 'video' in an email boosts click-through rates by 65%. Internet traffic is dominated by 74% video. Are you in the game? Join us for an informative session for tips on starting your video marketing program. We'll talk equipment (and how little you really need), avoiding rookie mistakes, easy post-production, and how to leverage various marketing channels for maximum engagement. Sound too good to be true? With just an iPad and laptop we topped 27,000 views last year - let us show you how.

- Equipment—You will be surprised how little you need to get started
- Filming—How to avoid rookie mistakes
- Design your video for maximum viewership
- Beginners post production
- Integrating video and social

Program Administrator Town Hall
Lessons Learned II - Moving a Program

Monday, May 15 | 4:00 PM | Salon C

Successful program administrators all encounter obstacles at some point in their journey. Ironically, what they learn from those challenges, and how they respond to them, frequently contributes to their long range success. A panel of program administrators will discuss specific issues regarding moving a program to a new carrier market, sharing the lessons learned along the way. Set this time aside in your meeting schedule to attend!

Moderator: Tom Gillingham, EverGuard Insurance Services

Kim Ayala, Landscape Contractors Insurance Services

Jim Jinhong, NationsBuilders Insurance Services (NBIS)

Chris McGovern, All Risks, Ltd.

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Rough Notes

"Experience is a master teacher, even when it's not our own."

-Gina Greenlee

Women's Networking Lunch

Empowering Women Entrepreneurs

Tuesday, May 16 | 11:45 AM | Grand Ballroom

Michelle LeClair

In 2006, Michelle opened the doors to her own insurance agency that quickly grew into one of the most successful woman owned agencies in the nation. Michelle's clients have ranged from multimillion dollar business owners to some of the most well-known actors, musicians and producers in the world.

Raised in Scientology, Michelle will share her story about the perilous exit from that organization and recovering from the destruction of her reputation and business that followed.

Michelle has launched a consulting business with a focus toward helping women entrepreneurs, especially in the insurance industry, grow to their full potential.

Come hear Michelle's story and be inspired.

More about Michelle: In 2014, Michelle was offered a large book deal through Random House/Penguin to write her memoir. The book, *Perfectly Clear,* is set to debut in September. Michelle's time is spent equally between her business, fighting for women's justice reform, completing her memoir and being a mother to her four young children. Michelle currently resides with her partner, Tena Clark, in Atlanta, GA.

Women's Networking Group Lunch sponsored by

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CONTACT

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Kim Ayala

Landscape Contractors Insurance Services, Inc. (LCIS)

Kim Ayala, CIC, CPL, CISR, CPIW has been with LCIS since June 1989 when the agency was formed. She helped grow the agency from three employees to over 67. She has 30+ years insurance agency experience and 25+ years in Program Administration. Kim has been President/ CEO of LCIS since 2008. Previous positions held at LCIS include Executive Vice President, COO, Vice President of Operations, Commercial Lines Manager and Package Rating Manager where functions included Package and Work Comp program initialization, implementation and management, systems administration, financial administration, management of HR, Accounting, and Package Underwriting/Rating and Customer Service departments. She works with the Board of Directors on budgeting and company direction, including involvement Golden Oak Cooperative members.

Gregory Bautista

Wilson Elser

Gregory Bautista is a partner in the White Plains office of national law firm Wilson Elser. He is co-chair of the firm's Cybersecurity & Data Privacy practice and a member of its Information Governance Leadership Committee. Mr. Bautista frequently serves as "cyber counsel" for insurers, drawing on a deep understanding of current and emerging electronic liability issues to provide legal assistance with cyber matters. As claims arise, he works with policyholders and insurers to advance a common interest in containing and limiting cyber-related financial and reputational losses. In addition, Mr. Bautista advises clients on their legal notification obligations and represents them in related regulatory investigations and third-party claims. He also interacts with clients' information technology support teams and engages forensic investigators to help determine the scope and nature of an incident and develop appropriate recommendations for remediation.

Erica Davis

Zurich

Erica Davis is Senior Vice President and Head of Specialty Products Errors & Omissions at Zurich. Erica has national oversight of the Professional Liability, Security & Privacy and Employed Lawyers lines of business, with a specialization and industry thought leadership position in network security and privacy risk-transfer solutions. Previously, Erica was part of the Commercial Markets division of Zurich, with roles as the East Zone Technology Manager and Middle Markets Underwriting Manager for New York and New Jersey. Prior to joining Zurich in 2009, she led a team of underwriters at the Chubb Group of Insurance Companies specializing in information and network technology, and was a Senior Underwriting Officer there for the Technology Insurance Specialty. Her background includes professional coverage, as well as the property and casualty lines of business. Erica holds a Bachelor of Arts from the University of Arizona with a major in English.

James Eaton

Beazley

James heads Global Private Enterprise within Beazley Specialty Lines which focuses on program and SME open market business including core areas of cyber, professional, healthcare and general liability. He is responsible for several teams underwriting across Beazley's US offices and in London for North American business, and Internationally from London, Paris, Munich and Singapore. James joined Beazley in 2006. Previously he had been a broker since 1984 and enjoyed divisional or board level responsibilities at each previous company.

Helen English

Distinguished Programs

Helen English is the President of Distinguished Express, a division of Distinguished Programs specializing in the fast, accurate online processing of real estate and hospitality accounts. Helen joined Distinguished Programs in 2000 and has held several senior roles within the company before being named President in 2014. She is also responsible for creating strategic program design and establishing both traditional and alternative risk partnerships with national carriers and reinsurers. Helen's insurance career prior to Distinguished was in retail broking, handling middle market accounts and new business production at large regional and national firm branches. Helen holds a BA in Economics from Drew University and attended Harvard Business School's Advanced Management Program.

Tom Gillingham

EverGuard Insurance Services

Tom Gillingham is a 19 year veteran in the commercial specialty program arena, with experience working at both carriers and program administrators. Tom is currently the CEO and co-owner of EverGuard Insurance Services, Inc., a Seattle based Program Administrator that specializes in the restaurant, bar and tavern niche. Prior to acquiring EverGuard, Tom was the CEO and owner of Gillingham & Associates, Inc. Tom sold Gillingham & Associates to Philadelphia Insurance Company in 2008 and remained on as President until 2010 to successfully oversee a smooth transition of the business. Tom graduated from Baylor University where he studied marketing and risk management. He has served in an advisory board capacity for philanthropic organizations and for the Colorado chapter of Young Presidents Organization (YPO).

Jim Jinhong

NationsBuilders Insurance Services (NBIS)

James L. E. Jinhong is Executive Vice President of Underwriting and Business Development for NBIS, an Atlanta, GA based Managing General Underwriter. NBIS is the premier provider of Risk Management and Loss Control Services with integrated underwriting products for Crane, Rigging, Millwright, Concrete Pump, and Specialized Transportation Industries. Jim has 25 years of underwriting and claims background with the last 20 years in heavy construction and specialized transportation. He has been with NBIS since 2000 and oversees the underwriting and business development aspects for the company which includes various authorities for general liability, inland marine, property, commercial automobile, worker's compensation, and umbrella/excess liability. Mr. Jinhong attended the University of Washington and Shoreline College in Washington State.

Holly Jurek

York Programs

Holly Jurek is Vice President of Sales for York Programs, a division of York Risk Services Group. As an insurance risk solution sales professional, she is responsible for providing claims administration and risk control services tailored to the market and profitability needs of insurance carriers, managing general agents, and program administrators. Holly joined York in 2004, and has over 20 years of experience in the insurance industry selling claim administration for national third party claims administrators. In addition, her experience includes various claims positions at a major insurance carrier including adjuster, claim account manager and claim manager. Holly graduated with a Bachelor's of Science Degree from DePaul University and holds an Associate in Claims designation from the Insurance Institute of America.

Taryn Kuhn

Glatfelter Insurance Group

Taryn Kuhn is the Director of Marketing for Glatfelter Insurance Group. Working in the marketing space since 2003, she has grown the digital marketing, social media and public relations efforts for multiple organizations. She is a graduate of York College of PA with a bachelor's in communication and The University of Maryland with a master's certificate in public relations.

Chris McGovern

All Risks, Ltd.

Chris McGovern, Senior Vice President of All Risks, Ltd., started his insurance career of over 25 years in claims and risk management. He joined All Risks, the nation's largest independent insurance wholesale broker in 1995 to develop a program facility for niche markets with few viable insurance options. Chris quickly turned $2M of General Liability premium for security guards, spread across several different brokerage markets, into a security guard program. Today, All Risks has over 30 proprietary programs with full quote, bind and issuance authority and many others in development. Under Chris' supervision, the Programs Division has grown from $1.5M in 1995 to $410M in annualized premium at year end 2016.

Paul Mihulka

Zurich

Paul Mihulka serves as the Head of New Programs for Zurich's Alternative Markets Business Unit. The New Programs Team is responsible for conducting due diligence, implementation and transition of new programs. Paul joined Zurich in 1999 as assistant general counsel for the Empire Fire & Marine Insurance Companies. In 2001, he was named vice president and assistant general counsel supporting the Contract Management Group. Later, Paul was named senior assistant general counsel supporting the Programs business unit. In 2007, he was instrumental in the reorganization of the Corporate Legal department and began managing a team of attorneys responsible for legal matters related to insurance transactions and regulations throughout Zurich North America. Starting in 2010, Paul served as Head of the Insurance Practice Group reporting directly to Zurich North America's Chief Legal Officer. After 12 years in Corporate Law, Paul was asked to serve as Chief of Staff for Zurich's Alternative Markets Business Unit.

Prior to joining Zurich, Paul served as a law clerk for the Alaska Superior Court and was in private practice as an attorney. He holds a BA in Philosophy from Creighton University, a Juris Doctorate from the University of Nebraska College of Law, and the CPCU designation.

John Peck

Glatfelter Insurance Group

John Peck is a multimedia graphic designer specializing in video and 2D/3D design. With almost a decade of experience, he currently manages studio and off-site video production and post-production for Glatfelter Insurance Group. He shares his expertise as an adjunct professor at Towson University in Maryland, where he also obtained his bachelor's degree in 3D design.

Craig Rappaport

AIX Group

Craig Rappaport is the Chief Operating Officer of AIX Group, a leading specialty insurer dedicated to serving the program business market. Craig is responsible for delivering operational excellence to all clients of AIX Group. Prior to being a founding partner of AIX in 2005, he served as COO of NOVA Casualty Company. Before his career in insurance, Craig was an investment banker where he advised clients in capital raising, mergers, and acquisitions. Craig holds a BA from the University of Pennsylvania and an MBA from Harvard Business School.

Coleman Ruiz

Retired Navy SEAL

Coleman is a U.S. Naval Academy graduate and former US 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. He 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 at the Naval Postgraduate School in Monterey, CA.

Art Siefert

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 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 sold in 2006 to US Risk. He 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.

John Solari

Glatfelter Program Managers

John A. Solari, CPCU, ARM-P, President, Glatfelter Underwriting Services and Chief Underwriting Officer, Glatfelter Programs, leads the strategic, program underwriting business unit of Glatfelter Insurance Group. Prior to joining Glatfelter in 2008, he was President of Professional Underwriters Company. He began his insurance career in 1983 and has held a variety of supervisory and management positions in the underwriting, claims and marketing departments for several national carriers. He also has insurance agency management and sales experience. John earned his MBA from St. Joseph's University, his bachelor's degree from LaSalle University, and has CPCU and ARM designations.

Patrick Thielen

Chubb

Patrick Thielen is Senior Vice President, Financial Lines, with Chubb and is product lead for the Cyber and Technology E&O lines of insurance for North America. Mr. Thielen has spent most of his career in underwriting and leadership roles for business groups that provide all types of insurance to technology-industry companies and cyber insurance to companies across all industries. He was recently part of the leadership team that launched the newly-formed Small Commercial Insurance division at Chubb. Among other responsibilities, Mr. Thielen is currently leading Chubb's efforts to expand the availability of cyber coverage and risk mitigation solutions for small businesses. Mr. Thielen graduated with honors and distinction from the University of Minnesota's Carlson School of Management in 2003.

Brynne Tillman

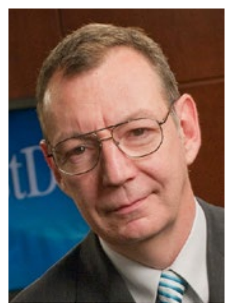
PeopleLinx

Brynne Tillman is the Chief Learning Officer at PeopleLinx, a Guided Social Selling Firm. Brynne has been a top producer and sales trainer since the 90s and is now one of the most sought after LinkedIn experts helping sales teams succeed by leveraging the power of LinkedIn for business development. As a bestselling author, trainer and keynote speaker, Brynne has helped thousands of sales reps for companies including Bloomberg, McKesson, IBM, The Kings, ABM, PennMutual, Prudential, Aramark, Fiserv, HPE and others generate significant revenue through LinkedIn and social selling training, coaching and daily reinforcement programs.

Wayne Umland

Wayne Umland Consulting, LLC

Wayne is founder and principal of Wayne Umland Consulting, a company he formed after retiring in 2013 as Executive Vice President & CIO from Glatfelter Insurance Group after 17 years. 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. Wayne's current work includes a research study regarding MGAs/Program Managers and their technology needs and appetite.



John Weber

A.M. Best

John Weber has been covering the insurance industry for nearly a decade. He's a fixture at every major insurance conference from RIMS to Target Markets. A lifelong resident of the Delaware Valley, John hosts video interviews and webinars for AM Best TV, and conducts interviews for AM Best Radio. John is also a familiar voice to radio listeners in the Philadelphia area as a contributor and fill in host for NPR's Morning Edition on 90.9, WHYY.

2017 TMPAA

Mid-Year Meeting

Big Challenges

Niche Solutions

TMPAA State of Program Business 2017

Presented by

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With the assistance of the Program Business Study committee and the TMPAA Advisory Board, the 2017 State of 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 data that documents trends in the size and dynamics of the program business market, along with valuable benchmarking information to assist with your future program business planning. Full results will be available to TMPAA members and presented at the 17th Annual Summit in October.

Survey responses are strictly confidential and viewable only to Advisen acting as an independent contractor for the Association. **Our goal is to have all TMPAA members participate.**

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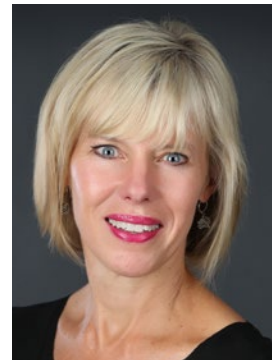

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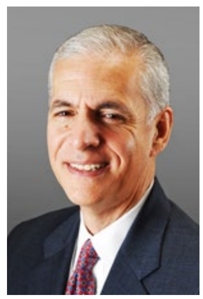

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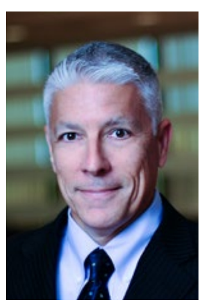

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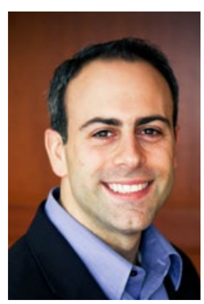

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Ray Scotto, Executive Director

ray.scotto@targetmkts.com

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

susanne.braconnier@targetmkts.com

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 with Target Markets since January 2002.

Monica Elischer,
Director of Membership Development

monica.elischer@targetmkts.com

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@targetmkts.com

Sarah Ayars is responsible for Target Programs including electronic marketing, Outlet Center development and member support. She also carries out Association marketing initiatives, website/app development and maintains a social media presence. 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.

For over 18 years the NetRate Systems team has been tailoring insurance processing solutions to meet the unique requirements of each of our MGA, Program Administrator, Carrier, and Lloyd's clients in the P&C marketplace.

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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.

Hall of Fame

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16TH ANNUAL SUMMIT CPL RECIPIENTS

The TMPAA recognized seven members for attaining the Certified Programs Leader (CPL) Designation during the 16th Annual Summit in Scottsdale, AZ.

CPL Designation recipients included Patrick Nelson, Arrowhead General Insurance Agency; Anthony Rodriguez, Distinguished Programs; Lynda Martir, Ironshore; Kim Boldi, Ironshore; Joseph Girardi, Ironshore; Thomas Doherty, NIP Programs and Carol Frey, Great American Insurance Company.

Pictured: Greg Thompson, Target University Dean and Heidi Strommen, TMPAA President present Tom Doherty and Carol Frey with their CPL certificates at the Summit.

**See the complete list of CPL recipients on the TMPAA website.*

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

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For more than five decades, Zurich has demonstrated an unwavering commitment to the program insurance space. This commitment continues, as does Zurich's ongoing efforts to help bring more knowledge, value and service to its program administrators, independent agents and customers.

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- Zurich program manager assigned for each program
- Over 60 programs offered across dozens of business segments

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Zurich is an established, leading provider of programs insurance with more than 50 years of continuous presence in program business. Our strong rating affirms that Zurich Insurance Group remains well-capitalized.

- 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

Zurich has devoted itself to the program space by focusing the resources of approximately 200 employees to program business while building long-term relationships with program administrators who possess market-specific knowledge and experience.

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

For more information, visit **www.zurichna.com/programs** or call **1-800-228-9283**

*Rating as of August 2016. A.M. Best's Ratings are under continuous review and subject to change and/or affirmation. For the latest Best's Ratings and Best's Company Reports (which include Best's Ratings), visit the A.M. Best website at www.ambest.com. The rating represents the overall financial status of the individual member companies of Zurich in North America, including Zurich American Insurance Company, and is not a recommendation of the specific policy provisions, rates or practices of each issuing insurance company.

ZProgramsMatch.com is a Zurich in North America sponsored website that serves as a tool for agents to seek a program administrator who may have an appetite for such risks. Zurich does not guarantee any particular outcome nor guarantee that each and every such risk will be placed or accepted by the participating program administrator. Coverages may not be available in all states. Insurance coverages are underwritten by individual member companies of Zurich in North America, including Zurich American Insurance Company. Certain coverages not available in all states. Some coverages may be written on a nonadmitted basis through licensed surplus lines brokers.

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In an effort to bring greater efficiency to the market-finding process for Association members, Target Markets now provides the Carrier Search Portal (CSP). The CSP was designed in response to members' need for better access to information about the program strategies of our 60 carrier members. The CSP allows you to search for complementary markets using specific program characteristics and quickly identify your most likely program partners. A Market Profile is available for every carrier member of the group. Contact information and website links are all easily accessible.

We are excited to provide this resource for our members. During the Mid-Year Meeting, access to the CSP is available in the mobile app, simply click on the Carrier Search menu item.

TMPAA Carrier Members – View them all in the CSP

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TMPAA Charities

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 or the Target Markets Registration Desk.

"Packages from Home" Initiative

Please visit the ***Packages from Home*** table located outside of the Trade Show and assemble a care package to be received by wounded soldiers heading to Walter Reed Hospital from a facility in Germany. This initiative is being coordinated with the American Red Cross.

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Mark captivates audiences with lessons learned from his extensive travels and experiences in the Navy, outer space and on the ground. From leading teams in some of the most dynamic environments imaginable, to the thrill of spaceflight, and the recovery and resilience of his wife Gabrielle Giffords, he reveals the foundations for success so you can accomplish your mission in life and work.

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