Sunday & Monday
September 29 & 30, 2019
Renaissance Tampa International Plaza Hotel
4200 Jim Walter Boulevard
Tampa, Florida 33607
Good morning and welcome to the 2019 Insurance Accounting & Systems Association (IASA) Sunshine Chapter Fall Conference!

We are pleased to present this year’s Fall Conference and are confident that you will enjoy the program as well as the accommodations here at the Renaissance Tampa International Plaza Hotel in Tampa, Florida.

The conference has been designed to provide you with valuable, timely information on issues facing insurance companies with an emphasis on matters unique to the Florida market. We hope that you will enjoy meeting and speaking with the many exhibitors who have helped keep the cost of this conference low. Please stop by and visit their booths which will provide you the chance to encounter new products, services, and opportunities available to meet your continuing needs.

This year’s theme is shining a light on the contributions from and the challenges that face women in the insurance industry. While women make up approximately 60% of the insurance workforce, they only hold 11% of named executive officer positions and 19% of board of director seats. This is up from 7% and 12% as of 2013. While we have come a long way, there is still more work to be done.

The IASA continues a constant recruitment of volunteers who are excited about becoming more personally involved with the insurance industry through this fine organization. If you are interested in taking a more active role in IASA on our local chapter level or on the international level, please do not hesitate to approach any current chapter board member or the IASA international office at www.iasa.org.

We have tried to incorporate your comments and suggestions every year to make a more successful conference. Your candid evaluations are of vital importance to the continuous improvement in value that the IASA can bring to you and your companies. Feel free to direct any additional comments to one of the chapter board members and committee members listed below. We are eager to discuss any suggestions to make the conference more informative and enjoyable for you.

Thank you for your participation this year and please enjoy the conference!

All the best,

Sunshine Chapter Board & Committee Members
Sunshine Chapter
2019 Fall Conference

Conference Agenda

Sunday, September 29, 2019

6:00 – 8:00 pm Welcome Reception and Early Registration

Monday, September 30, 2019

7:00 – 8:00 am Continental Breakfast with Exhibitors & Registration

8:00 – 8:15 am Introductions and Opening Remarks

8:15 – 9:05 am Session: Florida Insurance Regulatory Update
Fred Karlinsky, Greenberg Traurig LLP

9:05 – 9:55 am Session: Deal with the Talent Gap
Kelly Fairbairn, PPS International Limited

9:55 – 10:15 am Refreshment Break with Exhibitors
Sponsored by Prevail Consulting

10:15 – 11:05 am Session: Insurance Statutory Accounting Update
Connie Woodroof, NAIC Liaisons, Sapiens

11:05 am – 12:15 pm Session: M&A Readiness - followed by Executive Panel
Dustin Hamilton, Dixon Hughes Goodman LLP (DHG)
Executive Panel:
(Moderator) Brian Smith – Partner, DHG Insurance
Mark Harmsworth – Chief Financial Officer, HCI Group, Inc.
David Dowden – Investment Associate, Baldwin Risk Partners
Rishi Marwaha – Managing Director, Guy Carpenter Securities
Dustin Hamilton – Managing Director, DHG Transaction Advisory Services

12:15 – 1:15 pm Lunch
Sponsored by Content Critical Solutions and Financial Software Innovations Inc/FSI

1:15 – 2:05 pm Session: Diversity in Insurance
Erin Frackleton and Meghan Lodolo, McKinsey & Company

Executive Panel:
Paige Scott, The Auto Club (AAA)
Rhonda Loshonkohl, Cabrillo Coastal General Insurance Agency
Nancy Baily, Safepoint Insurance Company
Meghan Lodolo, McKinsey & Company

3:20 – 3:40 pm Refreshment Break with Exhibitors
Sponsored by Prevail Consulting

3:40 – 4:30 pm Session: Rating Agency Perspective
Joe Petrelli, Demotech

4:45 – 5:00 pm Closing Remarks and Conference Evaluation

Special thanks to Crowe LLP for being our full conference sponsor.
Session Objectives

Florida Insurance Regulatory Update (Fred Karlinsky)

1. Understanding the current AOB landscape in Florida.
2. Gaining an overview of what to expect for the 2020 Legislative Session.
3. Seeing the impacts of Florida's economy on the state's regulatory environment.

Dealing with the Talent Gap (Kelly Fairbairn)

1. Use Success planning techniques to address talent gaps beyond the C-Suite.
2. Identify talent development gaps unique to having 4 generations in the workforce.
3. Use a checklist to evaluate organizational talent gaps and create a plan to address them.

Insurance Statutory Accounting Update (Connie Woodruff)

1. Prepare attendees for annual reporting.
2. Provide updates for pending NAIC projects.
3. Alert attendees to RBC revisions.

M&A Readiness (Dustin Hamilton)

1. Understand M&A Transaction Drivers
2. Understand Value Enhancers and Red Flags
3. Hear from panelist on real life M&A deal experiences and stories of success and failures

Diversity & Inclusion in Insurance (Erin Frackleton and Meghan Lodolo)

1. Discuss the case for change – how gains in gender and ethnic diversity can create increased economic value
2. Share current fact base on diversity in the US and in the insurance sector including key drivers of outcomes
3. Discuss the actions that organizations, managers, and individuals can take to foster a more diverse and inclusive workplace

Women in Insurance Panel (Lisa Miller)

1. To help the audience understand how women in the insurance business can be strategic in their presentations, in meetings and in the spoken and written word
2. To raise the awareness of the audience about how women advance their career without sacrificing their family and home life
3. To explain to the audience the concept of unconscious bias in the workplace and how to combat it
About the Presenters

Full biographies of our presenters are provided in the following pages, by order of their scheduled session.

Fred Karlinsky
Kelly Fairbairn
Connie Woodroof
Dustin Hamilton
Erin Frackleton
Meghan Lodolo
Lisa Miller
Sunshine Chapter  
2019 Fall Conference

Exhibitors & Sponsors

Thank You to our Exhibitors and Sponsors for their generous support!

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Special Thanks to Swift Print Communications for their additional support to help make this conference a success.

They provided printing and binding of all conference program booklets.

Swift Print Communications**