



# PLACE YOUR BETS!

# Managing Risk in an Evolving Insurance Landscape 2025 Insurance Roundtable

June 4-6 | The Gwen | Chicago, Illinois

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Managing Risk in an Evolving Insurance Landscape

# 2025 Insurance Roundtable June 4-6 | The Gwen | Chicago, Illinois

Welcome to Chicago for the ALFA International 2025 Insurance Roundtable. We are so glad you are joining us and we are looking forward to spending time with colleagues and insurance professionals from across the country.

If you are joining us, it is likely because you have some experience in the insurance space. While there may be some avid gamblers among us, even for those of us who do not often find ourselves at the tables or the betting window, we find ourselves dealing with and managing the ultimate game of chance in relation to insurance claims. Do you overpay a case to settle and avoid risk or do you bet the farm on the jury's decision? Is this the storm season where Mother Nature sets her sites on risks you insure setting you up for the ultimate bust? During our time together we will explore ways that the risk of insurance claims and claims related litigation can be managed and minimized. We will explore topics including selecting and preparing 30(b)(6) witnesses, policy limit demands, choice of law, policy rescissions, tort reforms related to insurance, discovery on discovery, leveraging technology to lighten the load and cancellations and lapse of policies for premium nonpayment. We think we have hit the jackpot with all of our panels and we are excited to share our winnings with you.

A great time in Chicago is definitely in the cards. We have sweetened the pot by offering some excellent social opportunities throughout our time together. We will host a casino night where we can all test our luck while engaging and making new contacts and new friends. We will also have the opportunity to explore Chicago with options to explore by boat, bike or bus!



#### Marcie Schout

Program Chair, 2025 Insurance Roundtable QUILLING, SELANDER, LOWNDS, WINSLETT & MOSER, P.C. Dallas. Texas



### **ALL ABOUT CHICAGO**

Located on the shores of Lake Michigan, Chicago has emerged from its humble beginnings as a trade outpost and military base into an international hub for finance, industry, telecommunications and infrastructure. This bustling Midwestern metropolis offers world renowned architecture, dozens of theaters and music venues, professional sports teams and a variety of sight-seeing destinations including Millennium Park and Navy Pier. The Gwen is located just steps from the Magnificent Mile—and minutes from Chicago's business and financial centers. The views of the downtown skyline and Michigan Avenue will leave a lasting impression of the "Second City" long after your visit. Taking the Blue Line (O'Hare) or Orange Line (Midway) trains are recommended, especially during rush hours, and are easily accessible at Chicago's two international airports. Taxi cabs and ride share (Uber, Lyft, etc.) are also available from both airports.

# WHAT IS ALFA INTERNATIONAL?

ALFA International is the premier network of independent law firms. Founded in 1980, ALFA International was the first and continues to be one of the largest and strongest legal networks. We have 140 member firms throughout the world. Our 80 U.S. firms represent 95 of the 100 largest metropolitan areas. Our 60 international firms are located throughout Europe, Asia, Australia/New Zealand, Africa, Canada, Mexico and South America.

ALFA International's mission is to provide high quality, cost efficient legal services wherever our clients need them. The ALFA International model enables our members to use their local expertise to deliver highly effective legal solutions, often drawing upon the collective wisdom and experience of other member firms. ALFA International clients benefit from a geographically comprehensive network of exceptional law firms and accomplished trial and business counsel. Our member firms meet high standards to be part of the ALFA International network and are well respected by their peers in the legal and business community.

# **INSURANCE PRACTICE GROUP LEADERSHIP**



#### P. Douglas Barr

Vice Chair, ALFA International Board of Directors STOLL KEENON OGDEN PLLC Lexington, Kentucky Richard Hennessey



#### **Richard Hennessey** Chair, Insurance Practice Group MORRISON MAHONEY LLP Boston, Massachusetts



**Kathy Terry** Marketing Chair, Insurance Practice Group PHILLIPS MURRAH P.C. Oklahoma City, Oklahoma



Marcie Schout Program Chair, 2025 Insurance Roundtable QUILLING, SELANDER, LOWNDS, WINSLETT & MOSER, P.C. Dallas, Texas



Lex Dunn Chair Emeritus, Insurance Practice Group MCCANDLISH HOLTON Richmond, Virginia



## 2:00 p.m. - 6:00 p.m. **EARLY REGISTRATION**

Prefunction, The Gallery Ballroom

## 3:00 p.m. - 5:00 p.m. **FACULTY REHEARSAL**

#### The Grand Salon

\*All moderators are encouraged to use this time to set up a meeting with their panelists to review their session materials.

# 3:00 p.m. – 4:00 p.m. **CLIENT ADVISORY BOARD MEETING**

#### Baroque

\*Open to members of the Insurance Client Advisory Board & Practice Group Leadership.

# 4:00 p.m. - 5:00 p.m. **CLIENT ROUNDTABLE**

#### Baroque

This event allows client attendees the opportunity to exchange ideas and share best practices in a social setting without ALFA International lawyers present. An agenda of hot topics for discussion will be sent to all registrants a few weeks prior to the program. The roundtable will be moderated by a member of the Insurance Practice Group Client Advisory Board. We look forward to a vibrant and engaging discussion!

# 4:30 p.m. - 5:00 p.m. **ALL ALFA INTERNATIONAL ATTORNEY MEETING**

Realism

All ALFA International attorneys are required to attend.

# 5:00 p.m. – 6:00 p.m. WOMEN'S INITIATIVE EVENT

The Gallery Terrace

You're invited to join the ALFA International Women's Initiative Practice Group for a cocktail reception that celebrates the rich history of Chicago Jazz music and some of the city's iconic culinary delights. We'll dive into stories of legendary jazz musicians that shaped the Windy City's musical legacy.



Brandie Morgenroth Women's Initiative Liaison NILAN JOHNSON LEWIS PA Minneapolis, Minnesota

6:00 p.m. - 9:00 p.m.

# WELCOME RECEPTION, **BUFFET DINNER** & REGISTRATION

The Gallery Terrace & Ballroom



# **THURSDAY, JUNE 5**

## 7:00 a.m. - 8:00 a.m. **BREAKFAST BUFFET**

Upstairs at The Gwen-Private Affairs

# 7:00 a.m. - 8:00 a.m. **FIRST TIME ATTENDEE** BREAKFAST

#### Baroaue

\*All first time client and attorney attendees are encouraged to attend this breakfast to connect and get to know each other.

# 8:00 a.m. - 1:00 p.m. **PROGRAM SESSIONS**

The Grand Salon, Renaissance





#### Jessica Zaroski Bauer Chief Executive Officer ALFA INTERNATIONAL Chicago, Illinois



**Marcie Schout** Proaram Chair. 2025 Insurance Roundtable QUILLING, SELANDER, LOWNDS, WINSLETT & MOSER, P.C. Dallas, Texas

**Richard Hennessey** Chair, Insurance Practice Group MORRISON MAHONEY LLP Boston, Massachusetts

Lexington, Kentucky

## 8:15 a.m. - 9:15 a.m. **GENERAL SESSION**

# No Dice—Rescission of Policies

When as an insurer you discover that there was fraud in connection with the policy application, what are your options for rescinding the policy? This panel will explore what circumstances will justify rescission or policies and the practical steps of how to accomplish rescission.





Pete Ryndak JOHNSON & BELL, LTD. Chicago, Illinois



Executive Claims Specialist MARKEL CORPORATION New York, New York



Jennifer Wojciechowski Vice President Operations CAU/ALLIANT Yardley, Pennsylvania

9:15 a.m. - 9:30 a.m. **BREAK** 

P. Douglas Barr Vice Chair Chair, ALFA International Board of Directors STOLL KEENON OGDEN PLLC





#### 9:30 a.m. – 10:30 a.m. **GROUP ONE ROUNDTABLE DISCUSSIONS**

# TRACK 🥰 Doubling Down—Strategies for **Responding to Discovery on Discovery**

With the advent of e-discovery and all that entails, an emerging trend is for litigants to conduct focused discovery on how institutions have gone about identifying and gathering the information that has (or has not) been produced. This panel will explore the types of discovery requests being seen in this space and strategies for responding.



Moderator HAIGHT BROWN & BONESTEEL LLP Los Angeles, California

**Kristian Moriarty** 



Chester Hill COSGRAVE VERGEER KESTER LLP Portland, Oregon

# TRACK 🙋 Calling Your Bluff—Handling and **Responding to Timed Policy Limit Demands**

In the current context of inflated verdicts, dealing with policy limit demands has become more and more challenging as these demands present the ultimate gamble for insurers as they run the risk of open policy exposure in many jurisdictions if such a demand is rejected. This panel will explore issues related to the risk created by policy limit demands and strategies for responding to them.



# Andrew Flynt

Moderator YOUNG MOORE AND HENDERSON, P.A. Raleigh, North Carolina



Litigation Manager FRANKENMUTH Frankenmuth, Michigan



John Cavanaugh Manager - Field Claims ACUITY Port Washington, Wisconsin



Glenn Fencl JOHNSON & BELL, LTD. Chicago, Illinois

# 10:30 a.m. - 10:45 a.m.

BREAK

# 10:45 a.m. - 11:45 a.m. **GROUP TWO ROUNDTABLE DISCUSSIONS**

# TRACK 🥵 Calling in the Marker— **Cancellation and Lapse of Policies Due to Premium Non-Payment**

The House always gets paid because there are serious consequences when someone attempts to not pay. Similarly, in the insurance realm, where premiums are not paid policies can lapse or be cancelled, raising numerous issues about when and in what circumstances non-payment of premium can justify cancelling a policy. This panel will explore issues surrounding how the non-payment of premium impacts insurance policies and how coverage can be cancelled or how lapse can occur.



#### Kathy Terry Moderator

PHILLIPS MURRAH P.C. Oklahoma City, Oklahoma



Susan Duff Assistant General Counsel TRANSAMERICA LIFE INSURANCE COMPANY Cedar Rapids, Iowa



Lori-Ann Russo-Green Senior Claims Manager NAUTILUS INSURANCE GROUP Scottsdale, Arizona



**Kevin Griffiths** SCANLAN GRIFFITHS + ALDRIDGE Boise, Idaho

# TRACK 🤒 Living on Easy Street— How Technology Tools Can Lighten the Load

We live in a time where there are emerging technologies and tools that can make the lives of those working in the insurance context easier, and sometimes harder. This panel will explore how the emergence of artificial intelligence and tools using artificial intelligence are creating challenges and opportunities for practitioners.



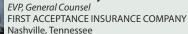
# Moderator



QUILLING, SELANDER, LOWNDS, WINSLETT & MOSER, P.C. Dallas, Texas



# Sarannah McMurtry



# **David Vanalek**



Chief Legal and Compliance Officer, Corporate Secretary RICHMOND NATIONAL Richmond, Virginia



Patrick VanderJeugdt YOUNG MOORE AND HENDERSON, P.A. Raleigh, North Carolina

# **THURSDAY, JUNE 5**



11:45 a.m. - 12:00 p.m. **BREAK** 

12:00 p.m. – 1:00 p.m. **GENERAL SESSION** 

# Dealer's Choice— Selecting and Preparing a 30(b)(6) Witness

One of the perks of being a corporate defendant is the ability to choose the witness who speaks for you. The price for that perk is the responsibility of selecting the best witness and ensuring that they are prepared to address the noticed topics. This panel will explore issues related to considerations in selecting a 30(b)(6) witness and preparing them to testify.



# **Richard Hennessey**

Moderator MORRISON MAHONEY LLP Boston, Massachusetts



**Amy Heiserman** Senior Counsel NAUTILUS INSURANCE GROUP Scottsdale, Arizona



**Bill Hittler** NILAN JOHNSON LEWIS PA Minneapolis, Minnesota

**REINSURANCE GROUP** 

Kari Briscoe Director, Claim Consulting

# 1:00 p.m. – 2:00 p.m. **LUNCH BUFFET**

Upstairs at The Gwen-Private Affairs

# 2:30 p.m. - 5:30 p.m. **OPTIONAL ACTIVITIES**

See attached document for optional activity choices. Prior Registration is Required.



7:00 p.m. - 10:00 p.m.

# L THE DICE &

**Reception & Dinner** 

7:00 p.m. - 8:00 p.m.

8:00 p.m. - 9:00 p.m. **Family-Style Dinner** 

9:00 p.m. - 10:00 p.m. **Dessert, Coffee & Casino Play** 

blackjack, roulette, craps and Texas Hold 'Em, tables for a family style dinner. This is sure to be a





# 6:30 a.m. - 7:30 a.m. WELLNESS WWORLDWIDE WORKOUT

8:00 a.m. - 9:00 a.m.

**BREAKFAST BUFFET** 

Upstairs at The Gwen-Private Affairs

9:00 a.m. - 11:45 a.m. **PROGRAM SESSIONS** 

The Grand Salon

9:00 a.m. - 10:00 a.m. **GENERAL SESSION** 

# What are the House Rules? Choice of Law Issues

In any game of chance, it is important to understand the rules of the game and any House Rules that might apply. The same is true when analyzing insurance related issues. The starting point for any analysis and management of risk is understanding the rules that will apply. In this panel we will explore choice of law situations that commonly occur in the insurance space.



Moderator LEAKE ANDERSSON New Orleans, Louisiana



**Bill Schneider** MORRISON MAHONEY LLP Boston, Massachusetts



Andrea Snowden Vice President, Associate General Counsel AMERITAS LIFE INSURANCE CORP. Lincoln, Nebraska



# 10:00 a.m. - 10:15 a.m.

# **ALFA international HQ Update**

This session will provide an overview of many new and some improved offerings available at ALFAI as well as resources and opportunities available to our clients.



# 11:30 a.m. - 11:45 a.m.

# Closing Remarks



**Marcie Schout** Program Chair, 2025 Insurance Roundtable QUILLING, SELANDER, LOWNDS, WINSLETT & MOSER, P.C. Dallas, Texas



#### **Richard Hennessey**

Chair, Insurance Practice Group MORRISON MAHONEY LLP Boston, Massachusetts

# **BREAK** 10:30 a.m. - 11:30 a.m.

10:15 a.m. - 10:30 a.m.

# **GENERAL SESSION**

# Imposing House Limits— Tort Reform in the Insurance Space

To minimize its risk, the House will sometimes place limits on the bets that can be made. In the same way, some jurisdictions are imposing tort reform styled restrictions on insurance related litigation in an effort to curb insurance losses and the corresponding sky-rocketing premiums for insurance. This panel will look at recent tort reform efforts and their impacts on claims and explore what might be on the horizon as markets look for ways to control ever increasing premiums for insurance coverage.



# Stephanie Montague

Moderator HALL & EVANS, LLC Denver, Colorado

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# Todd McCormick W.R. BERKLEY CORPORATION

Vice President, Senior Legal Counsel Greenwich, Connecticut

# **FACULTY BIOS**

P. DOUGLAS BARR is the Managing Director and Chairman of the Board of Stoll Keenon Ogden PLLC ("SKO"), ALFAI's member firm in Lexington and Louisville, Kentucky. Doug is responsible for all operations including the Firm's strategic direction. In his more than 8 years, Doug has led the firm through significant growth and transformational change in technology, information management, professional development, legal service delivery, generational succession, and cultural development, including SKO's multiyear certification under the Mansfield Rule. Doug's law practice has focused on Complex Business Litigation and Intellectual Property Litigation. He has been lead trial counsel in numerous high-stakes, bet-the-company cases in many U.S. jurisdictions. His IP experience includes patents, trademarks, and trade secrets. Most recently, he has authored legal articles and been a frequent public speaker in Sports Law, specifically on the evolving issues in Name, Image, and Likeness rights in collegiate athletics. Doug has hosted and been a guest speaker on SKO's podcast, "SKO Unmuted" ("Chaos: The State of the NCAA's Compensation Rules for Student Athletes after Alston" June 2021). Doug is a Member of the Board of Directors of Commerce Lexington and the Kentucky Chamber of Commerce and is a past Board Member of ALFA and currently serves as chair of ALFAI's Marketing Committee. He is a graduate of the University of Kentucky and the Ohio State University College of Law.

JESSICA ZAROSKI BAUER joined ALFA International (ALFAI) in 2004 as a Coordinator of Events & Member Services. She then worked for several years as a Marketing Manager, Chief Events Officer and Chief Operating Officer. After 17 years with the association, she accepted her current role as Chief Executive Officer. In this position she is the strategic thought leader of the organization, working with closely with the Board of Directors and the various ALFAI committees. She manages headquarters staff and maintains constant communication with association members. Jessica oversees the

Senior Director, Liability & Counsel AMERICAN PROPERTY CASUALTY INSURANCE ASSOCIATION Washington, D.C.

Rhonda Hurwitz



member recruitment, development and retention programs as well as the marketing and business development initiatives for the organization. Prior to joining ALFA International, she worked in the marketing department of the Chicago-based law firm of Gardner, Carton & Douglas, LLP (now Faegre Drinker Biddle & Reath). She is a graduate of the University of Iowa Tippie College of Business (Go Hawkeyes!) and is an avid college football fan. In her spare time Jessica can be found enjoying family time with her husband Harry and her two young daughters, Greta and Vivian.

KARI BRISCOE is the Executive Director of Claim Consulting for Reinsurance Group of America (RGA). Kari provides internal claim risk management and external value-added services to RGA's group LTD customers in the U.S. Prior to joining RGA, Kari was an Appeals Case Manager for several years with a group disability insurer managing appealed LTD claims and litigated claims. Kari also has significant experience as a LTD Social Security Case Manager and was a paralegal for several private law firms. She has more than 30 years of industry experience.

W. EDWARD CARLTON is a shareholder at the ALFA International firm Quilling, Selander, Lownds, Winslett & Moser, P.C. in Dallas, Texas. He represents business clients in complex civil litigation. He provides consultation and representation to multiple national insurance carriers in numerous areas of insurance coverage and defends insurers and third-party administrators with respect to coverage disputes and claims of insurance bad faith, deceptive trade practices and insurance code violations. He also defends insureds in business and personal injury litigation, including attorney professional liability, auto liability, premises liability, products liability, construction defect, catastrophic injury, and first party property claims. Ed is a Fellow of the American College of Coverage Counsel. He earned his B.A. from the University of North Carolina-Chapel Hill and his J.D. from Cumberland School of Law, Samford University.



JOHN F CAVANAUGH is a Field Claims Manager for Acuity Insurance, a mutual Property & Casualty Company that writes over \$2 billion in premium in 31 states. Acuity is headquartered in Sheboygan, WI. For the past 18 years John has supervised the Chicagoland Field Claims district for Acuity after previously holding positions as a Staff Claims Consultant and a Field Claims Manager in the Milwaukee district. He has obtained the Associate in Claims (AIC) and the Chartered Property Casualty Underwriter (CPCU) insurance designations.

LAWRENCE A. "LEX" DUNN is a partner in the Richmond, Virginia ALFA International law firm of McCandlish Holton, PC. Mr. Dunn has an active litigation practice which has a primary focus on property and casualty matters, coverage issues, insurance-agent broker liability and other professional liability matters. His experience also includes providing insurance coverage opinions, mediation, binding arbitration and intercompany insurance procedures. Mr. Dunn has extensive jury trial experience in both Virginia state courts and federal courts. Mr. Dunn received his undergraduate degree from the University of Virginia and his law degree from Marshall-Wythe School of Law at the College of William and Mary.

GLENN F. FENCL is chair of the Insurance Group at Johnson & Bell, Ltd. the ALFA International member firm in Chicago, Illinois, where his practice is concentrated on third party insurance coverage. Glenn has handled numerous declaratory judgment trials in state and federal courts including sexual misconduct matters for a national insurer of Catholic diocese. In addition, he is lead trial lawyer for various national manufacturers defending product liability cases, counsel defending NCAA football concussion cases and has more than 25 jury verdicts. He has given several ALFAI presentations and has authored numerous articles, including the "Comprehensive General Liability" chapter for the Illinois Institute for Continuing Legal Education treatise "Liability Insurance Coverage Practice." Holder of an AV rating from Martindale-Hubbell, Glenn is involved in many law organizations, including: the International Association of Defense Counsel, the Illinois Association of Defense Trial Counsel, the Illinois Bar Association, Trial Lawyers Club of Chicago, American Arbitration Association, Defense Research Institute and the Illinois Society of Trial Lawyers. He is a past Chair of the ALFA International Insurance Law Practice Group.

ANDREW P. FLYNT is a partner with Young Moore and Henderson, P.A., ALFA International's member firm in North Carolina. Andrew's insurance practice involves advising and representing insurers on complex firstparty and third-party coverage matters. He regularly provides coverage opinions and litigates coverage issues in declaratory judgment actions. He has extensive experience with coverage issues involving construction defect and sexual abuse claims. In the last year, he has assisted insurers with evaluating claims for business income loss because of COVID-19. He has also been involved in litigation over COVID business income loss claims.

**KEVIN GRIFFITHS** is one of the founders of Scanlan Griffiths + Aldridge, the ALFA International member firm in Boise, ID and currently serves as its managing partner. Kevin has spent the last 15 years as a civil litigator, with a focus on insurance coverage and bad faith, medical malpractice and professional liability, personal injury, premises liability, products liability, complex commercial litigation, and electronic discovery management. Prior to entering private practice, Kevin served as a law clerk to the Hon. Jim Jones of the Idaho Supreme Court. Kevin is a 2009 graduate of the University of Idaho College of Law, where he has served as a visiting lecturer, teaching courses in Insurance Law and Pre-Trial Civil Practice.

**AMY HEISERMAN** is senior counsel at Nautilus Insurance Group. She oversees extra-contractual litigation filed against the company and provides legal review and analysis of coverage matters. Her work spans across all 50 states in both state and federal courts. Prior to going in-house, Amy litigated commercial business disputes and insurance coverage/bad faith matters.

**RICHARD HENNESSEY** is a partner in the Boston office of Morrison Mahoney, the ALFA International firm in Massachusetts. He represents some of the nation's leading insurance carriers in a variety of civil litigation matters involving commercial property policies, professional and general liability policies, homeowners policies, and builders risk policies. He has extensive coverage experience in a variety of matters across several lines of coverage. Richard was recently a senior claims analyst with a national third-party claims administrator concentrating in complex professional liability insurance coverage issues throughout the United States.

**BILL HITTLER** is a senior counsel for Nilan Johnson Lewis PA in Minneapolis, Minnesota. His practice involves representing clients on employee benefits, reinsurance and health care litigation ERISA matters, as well as defending bad faith suits. Bill is a graduate of Notre Dame Law School and former law clerk to Judge John Kilkenny in the Ninth Circuit Court of Appeals. Outside of the office, Bill is most proud of his time representing asylum applicants through the local nonprofit Advocates for Human Rights, volunteering in the kindergarten class at Las Estrellas School and mentoring college students through the Alan Page Education Foundation.

MATT KLINSKI is the Claims Litigation Director for Frankenmuth Insurance. He oversees all litigated claims, along with vendor management, and has been with Frankenmuth Insurance for 20 years. Frankenmuth Insurance is a multi-line insurance company headquartered in Frankenmuth, Michigan that has been in business for more than 155 years. Frankenmuth Insurance is a property and casualty insurance company that operates in 15 states across the east-central, southeast, and upper-northeast United States.

**TODD D. MCCORMICK** is vice president and senior legal counsel for W.R. Berkley Corporation with more than 20 years of combined insurance and law firm experience. He brings both industry and legal technical expertise in the management of Berkley's largest and/or most complex claims and provides strategic guidance for high exposure and complex matters, including coverage and/or bad faith litigation. Todd further provides counsel and advice on reducing exposure through timely recognition of risk, and employment of litigation strategies and resolution plans which are wellformulated and executed. He recognizes the importance of giving back and is a dedicated supporter and volunteer for veteran-focused organizations like the Wounded Warrior Project and regularly participates in events that assist veterans in the community with their transition to civilian life.

SARANNAH MCMURTRY is Executive Vice President and General Counsel for First Acceptance Insurance in Nashville, TN. Prior to joining First Acceptance, Ms. McMurtry was in private practice where she primarily handled defense of insurance coverage and extra-contractual liability matters. She is an active member of the Claims and Litigation Management Alliance (CLM), serving as a Co-Dean for the CLM Claims College, School of Extracontractual Claims for the last four years and a presenter at numerous CLM conferences, meetings and webinars. In 2024 she was named the CLM Professional of the Year for Claims and Litigation Management. Ms. McMurtry also is a member of the Federation of Defense and Corporate Counsel (FDCC) and currently holds the position of Vice Chair for both the Insurance Coverage and Data Breach and Privacy Sections as well as Co-Chair for the FDCC Insurance Industry Institute (I-3) Conference for 2025.

**STEPHANIE A. MONTAGUE** is an attorney with the Alfa International firm Hall & Evans LLC in Denver, Colorado, with over twenty years' experience representing insurers in coverage disputes, bad faith litigation, and defense of claims arising from both personal and commercial policies. She was a licensed insurance producer in Colorado with expertise in sales, marketing and coverage assessment, emphasizing lawyers' professional liability and other errors and omissions claims-made coverage. Stephanie regularly defends individual professionals, such as insurance producers, as well as insurers and other corporate entities. Her current practice focuses on insurance coverage matters, professional liability defense, and regulatory compliance for insurers, producers, and other businesses operating in Colorado.

**KRISTIAN MORIARTY** is a partner with Haight Brown & Bonesteel, LLP, the ALFA International member firm in Los Angeles, CA. His practice centers on insurance coverage litigation amongst disputing carriers, bad faith litigation and providing coverage advice to carriers and insureds. He has extensive experience interpreting myriad lines of coverage, including general liability, property, auto, homeowners, builders risk policies and wrap-up insurance programs.



LORI-ANN RUSSO-GREEN is a Senior Claims Manager responsible for overseeing complex E&S Claims at Nautilus Insurance Group. With a combined twenty-nine years in the Insurance industry, Lori-Ann brings a diversity of experience and a wealth of knowledge to Nautilus. Starting her career in the Property and Casualty space in 1996, she garnered experience across the country in both Auto and Homeowners claims. As her career progressed, she transitioned into Commercial claims specializing in SBLL, Construction Defect, Hospitality, Contractors, NYLL and IP claims. She excels in litigation management, coverage analysis, risk transfer as well as regulatory and compliance audits. Lori-Ann has claims experience in all 50 states and is well versed in pressing jurisdictional issues. Lori-Ann actively volunteers her time on behalf of the Autism Society of North Carolina. She teaches cooking courses for disabled teens and adults in Wake Forest, NC and offers her assistance as an IEP advocate for families within Wake County.

PETER R. RYNDAK is a shareholder with Johnson & Bell, Ltd., the ALFA International member firm in Chicago, Illinois and Crown Point, Indiana. He concentrates his practice on complex commercial disputes and liability insurance coverage litigation. Mr. Ryndak has represented a variety of corporations and successfully handled litigation involving a wide range of issues, including contract disputes, intellectual property claims, and Qui Tam matters. Mr. Ryndak has also successfully litigated insurance coverage matters in the areas of commercial liability, construction defect, toxic tort, advertising injury, professional liability and environmental claims. He has authored numerous articles on insurance coverage and frequently counsels clients in the drafting and interpretation of new policy forms. He is a graduate of Northwestern University and Loyola University School of Law. Mr. Ryndak is a member of ALFA's Business Litigation Steering Committee, the Chicago Bar Association, the DuPage County Bar Association, the Illinois State Bar Association, the American Bar Association and the Illinois Association of Defense Trial Counsel.

WILLIAM A. SCHNEIDER is a partner in the Boston office of Morrison Mahoney LLP where he focuses his practice on civil litigation and firstparty insurance, with an emphasis on trial and appellate work in the state and federal courts. He has extensive coverage experience including policy drafting, policy interpretation and the general representation of insurance companies in a variety of matters across several lines of coverage. Bill received his B.A. with honors from the University of Massachusetts, Amherst in 1994, and Graduated from Suffolk University Law School with Honors in 1997. He earned his CPCU designation in 2001. Bill is a Fellow of the American College of Coverage Counsel (ACCC) and selected by his peers to The Best Lawyers in America© Insurance Law guide (2023).

MARCIE SCHOUT is a shareholder at the ALFA International member firm Quilling, Selander, Lownds, Winslett & Moser, P.C. in Dallas, Texas. A significant portion of Marcie's practice focuses on representing insurers in both first party property and third party-liability coverage disputes. Marcie is often called upon to assist her clients in formulating their coverage positions based on analysis of complex coverage issues and where necessary, represents insurers in litigation to resolve coverage disputes and to fend off bad faith allegations. Marcie earned her B.S. from Grand Valley Statute University (magna cum laude) and a J.D. from Baylor University (summa cum laude).

**MELISSA SWINDEL** is an Executive Claims Specialist & Senior Counsel for Markel Corporation, a global specialty insurance provider. Melissa has 17 years of insurance experience as a regulator, outside counsel and now in-house. Melissa currently handles complex bodily injury and property damage claims on a nationwide basis. She previously worked as Coverage Counsel for a New York law firm and was an Assistant Attorney General for the State of Massachusetts, in the Insurance and Financial Services Division. Melissa is an avid soccer fan (Go Wolves!) and loves spending time with her husband and daughter.

**KATHY TERRY** is a director with Phillips Murrah, P.C., the ALFA International member firm in Oklahoma City, Oklahoma. Kathy's practice focuses on labor and employment for management, insurance coverage, and bet-the-company litigation and crisis management. Her employment law practice includes litigation in wage/hour, discrimination, contract, and workplace torts, as well as labor arbitration, collective bargaining and consulting on wage differential,

workplace culture and ESG matters. Another substantial portion of Kathy's practice includes representing both major insurance companies and their insureds in coverage and liability disputes for commercial, personal, life and specialty lines. In addition to coverage advice and defense, including extra contractual defense, she also provides claims handling training and consultation for her insurance clients. For policyholders, mostly businesses, Kathy gives guidance on risks and exposures for which insurance is recommended, coverage audits and helps resolves questions of coverage between her clients and their insurance companies. Kathy also advises clients in large loss, existential impact litigation and public management of company crises.

ALEX TILLING is a partner with Leake Andersson, ALFA International's member firm in New Orleans, Louisiana. His insurance practice spans bad faith, construction defect, disability, EPL, errors and omissions, executive liability/D&O, life and health, casualty, occupational accident, professional liability and property litigation. He is also involved in the consulting and compliance/regulatory side, dealing with issues involving securities, customs and border patrol, federally qualified health centers and non-profit organizations. He has been a member of the American Health Lawyers Association since 2016 and is on the Board of the New Orleans Association of Defense Counsel. Alex graduated from Ohio State University in 1999 and obtained his law degree from Temple University in 2002. He also has a biology degree from the University of New Orleans.

DAVID T. VANALEK is the Chief Legal and Compliance Officer and Corporate Secretary of Richmond National, a specialty excess and surplus lines insurance company dedicated to writing hard to place risks for small and mid-sized businesses headquartered in Richmond, Virginia. David is responsible for all corporate governance, regulatory, compliance, claims law, and litigation activities of the company and its affiliates, and serves as legal advisor to the leadership team, business units, and board of directors. Prior to joining Richmond National, David served as the Claims Chief Operating Officer at a global Fortune 500 insurance carrier, where he led the day to day operational support for all claims divisions responsible for all lines of business throughout North America and Bermuda. David also served for years in various claims leadership roles in the professional liability, cyber liability and management liability product lines. Prior to joining the insurance industry, David was in private practice as a commercial litigator, serving clients throughout California and Illinois. He received his Bachelor's degree from the University of California, Los Angeles, and his law degree from the University of California, Davis, where he served as an Editor on Law Review, as well as a judicial extern for an associate justice of the California Supreme Court. David is a frequent speaker on insurance, claims, technology, professional liability, cyber liability and management liability issues.

**NIKI VAN ROEKEL** is a General Manager of Claims at Acuity Insurance Company. In that capacity, she oversees a team of insurance professionals handling commercial auto and general liability claims in several midwestern states. Upon graduating from South Dakota State University, Niki's first job was with Acuity and she has remained with the company for over 27 years.

JENNIFER L. WOJCIECHOWSKI is the VP - Insurance Operations at Community Association Underwriters of America, Inc., a division of Alliant Insurance Services. At CAU, Jennifer drives corporate goals and strategies across all departments, including claims, underwriting, product development, carrierrelations, business development, compliance and operations. A recovered insurance coverage attorney, her career includes leadership roles both in law firms and claims departments. She is an avid instructor on both the local and national level for numerous organizations, including Claims & Litigation Management Alliance and the Community Associations Institute. She is a 2021 inductee as a fellow into the College of Community Association Lawyers. She also has earned her Community Insurance Risk Management Specialist (CIRMS) designation. With CLM, she leads several committees and initiatives, including serving on the executive council and faculty for the annual Claims College and as Lead Chair of the Extra Contractual Committee. She has earned her Certified Claims Professional in Casualty Claims ("CCP"), Advanced Claims Professional ("ACP") designations and the Certified Litigation Management Professional ("CLMP") designations.

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# **GENERAL INFORMATION**

# **MEETING LOCATION**

The Gwen 521 North Rush Street Chicago, IL 60611 Tel: (312) 645-1500 Hotel Website

# REGISTRATION

Please contact ALFA International Headquarters to register.

ATTENDANCE IS OPEN ONLY TO MEMBERS OF ALFA INTERNATIONAL AND THEIR INVITED COMPANIONS AND IS LIMITED TO AGES 21+.

# ATTIRE

The attire for the educational sessions throughout the conference, and for the dinners on Wednesday and Thursday night, is business casual.

# **CLE CREDIT**

ALFA International is an approved CLE provider in Illinois, California & Pennsylvania and certifies this program has been approved for six hours of general CLE in these states. However, seminars are designed to meet CLE requirements, regardless of jurisdiction. To receive CLE credit outside of these states, attorneys should apply directly to their state's governing CLE board. Helpful links and information on how to apply for course credit are available on the ALFA International website and staff are available to assist with any concerns.

# SPECIAL ACCOMMODATION

If you need any special accommodations including a nursing room, special dietary meals, ADA access or other needs, please reach out to ALFAI staff in advance of the meeting and we will ensure that necessary accommodations are provided.



# **SEMINAR CONTACT**

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