



ALFA International
THE GLOBAL LEGAL NETWORK



IN THE EYE OF THE BEHOLDER:

Viewing Insurance & Professional Liability
Legal Issues from Modern Perspectives

2022 Insurance & Professional Liability Seminar

June 22-24, 2022 | The Logan | Philadelphia, Pennsylvania

www.ALFAInternational.com



ALL ABOUT PHILADELPHIA

Home to the Liberty Bell, Independence Hall and the steps of the Philadelphia Museum of Art that Rocky famously climbed, Philadelphia is home to some of the most historic and iconic sites in the country. The City of Brotherly Love offers something for everyone, including world-renowned museums, beautiful outdoor public spaces, delicious food and unmatched history. The Logan Hotel blends modern aesthetics with nods to the history of the city. It features Philadelphia-inspired artwork and a rooftop bar overlooking Logan Square. The hotel is centrally located to allow exploration of all the best things the city has to offer.

PROGRAM LEADERSHIP

Richard Hennessey

*Insurance Program Co-Chair,
2022 Insurance & Professional Liability Seminar*
MORRISON MAHONEY LLP
Boston, Massachusetts

Jacob Lehman

*Professional Liability Program Co-Chair,
2022 Insurance & Professional Liability Seminar*
GERMAN, GALLAGHER & MURTAGH, P.C.
Philadelphia, Pennsylvania

Lawrence A. "Lex" Dunn

Chair, ALFA International Insurance Law Practice Group
MCCANDLISH HOLTON, PC
Richmond, Virginia

Christine Mast

*Chair, ALFA International Professional
Liability Practice Group*
HAWKINS PARNELL & YOUNG, LLP
Atlanta, Georgia

IN THE EYE OF THE BEHOLDER:

Viewing Insurance & Professional Liability Legal Issues from Modern Perspectives

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What do we imagine when we talk about art? Whether it is a painting, sculpture, poem, dance or play, we consider not only the external attributes of the piece; color, texture, tone, the use of light and dark in a visual work, but also internal and intangible factors; perspective, historical significance, the artist's viewpoint, their place in the culture that produced the work or even how the work relates visually to others. The surface is important, of course, but what lies underneath matters just as much.

At the ALFA International 2022 Insurance & Professional Liability Seminar, we will take the same dual approach to discussing these areas of the law and your business. We will talk not just about landmark decisions and events, but also about how the intangibles—historic views and contemporary ideals; geographic and demographic perspectives; the impact of current technology, media, and social media influence and shape the issues and outcomes in these fields.

In both our general session and breakout tracks, we will talk about complex issues concerning mental health, substance abuse, and programs to support well-being and awareness. We will talk about best practices in the insurance industry to avoid litigation. We will talk about the unique challenges and opportunities companies will face in the wake of marijuana legalization.

We will talk about storytelling for the modern jury and the role of the 30(b)(6) witness. We will talk about interesting insurance coverage issues that confront insurers. We will talk about the latest hot topics (legal decisions and industry trends) in both the professional liability and insurance landscapes. At the end of this seminar, we will all come together to talk about the most current cybersecurity issues from the collective perspective of professionals in each track—professional liability and insurance coverage.

While this seminar is intended to provide you with high-level discussions about the law from the perspective of your business, an ALFA International event would never consist of solely all work and no play! On Thursday night, we look forward to having you join us for dinner and drinks at the Barnes Foundation: a world-class art museum located just steps from The Logan. The stunning contemporary building on the Ben Franklin Parkway houses the collection of the late Dr. Albert Barnes, an inventor and art visionary who assembled one of the preeminent collections of impressionist and expressionist art in existence. In assembling and displaying its collections, the Barnes focuses on the intangibles, including the relationship between the works. As you browse the galleries of works by the likes of Renoir, Cézanne, Matisse, Picasso, Modigliani, Van Gogh, and others, we hope to engage the creative spirit, inspire conversations with old friends and new, and to provide space for quiet contemplation of a moment captured in time.

Thank you for joining us in Philadelphia. We look forward to seeing you here!



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*Insurance Program Co-Chair,
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Philadelphia, Pennsylvania

WHAT IS ALFA INTERNATIONAL?

ALFA International (ALFAI) is the premier network of independent law firms. Founded in 1980, ALFAI is 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.

ALFAI's mission is to provide high quality, cost efficient legal services wherever our clients need them. The ALFAI 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. ALFAI 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 ALFAI network and are well respected by their peers in the legal and business community.

www.ALFAInternational.com

2:00 p.m. – 4:00 p.m.

Faculty Rehearsal & Early Registration

Mount Vernon & Foyer

5:30 p.m. – 6:30 p.m.

All ALFA International Attorney Meeting

Mount Vernon

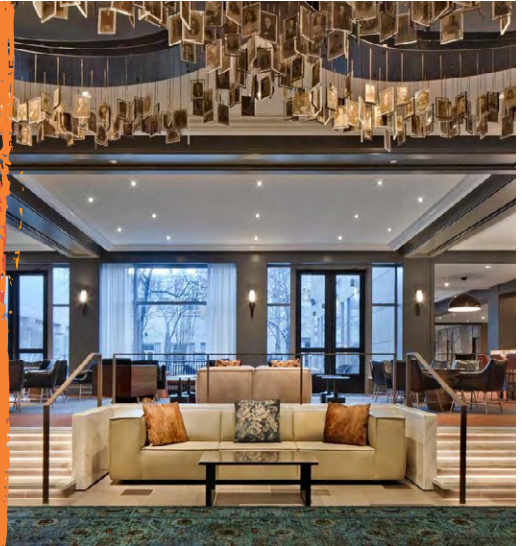
All ALFA International attorneys are required to attend.

6:30 p.m. – 9:30 p.m.

Cocktail Reception & Dinner Buffet

The Stenton Terrace, Ballroom Terrace & Courtyard

Welcome to the City of Brotherly Love! Tonight's opening reception and dinner will begin outdoors on the Stenton and Ballroom Terraces and in the Courtyard. Enjoy a cocktail while catching up with friends and making new connections before moving indoors for a buffet dinner.



Thursday, June 23

7:45 a.m. – 8:45 a.m.

BREAKFAST

The Stenton

8:45 a.m. – 4:00 p.m.

PROGRAM SESSIONS

Ballroom & Mount Vernon

8:45 a.m. – 9:05 a.m.

Introductory Remarks



Kevin Owens
Chair, ALFA International Board of Directors
JOHNSON & BELL, LTD.
Chicago, Illinois



Richard Hennessey
Insurance Program Co-Chair,
2022 Insurance
& Professional Liability Seminar
MORRISON MAHONEY LLP
Boston, Massachusetts



Jacob Lehman
Professional Liability Program Co-Chair,
2022 Insurance & Professional
Liability Seminar
GERMAN, GALLAGHER & MURTAGH, P.C.
Philadelphia, Pennsylvania

9:05 a.m. – 10:15 a.m.

PROFESSIONAL LIABILITY GENERAL SESSION

Promoting Mental Health and Well-Being in Your Organization and Triaging When Crisis Occurs

With professionals, including lawyers and medical professionals, struggling with alcohol, substance-use disorders, and mental health issues at an alarmingly high rate, professional associations, employers and insurers are implementing a variety of programs to support mental well-being, raise awareness and facilitate a reduction in such issues. This panel will explore a range of legal and ethical challenges that mental health and substance-abuse issues raise for companies and professional entities and their insurers. The panel will examine ways to balance the professional's duties to clients with the employer's duties to comply with ADA and privacy laws when concerns arise over a colleague's ability to cope with stress, fatigue, addiction, and other impairments, and how to guard against and defend claims resulting from alleged impairment.



Christine Mast
Moderator
HAWKINS PARNELL & YOUNG, LLP
Atlanta, Georgia



Edward Beitz
Litigation Counsel
GEISINGER LEGAL SERVICES
Philadelphia, Pennsylvania



Paula Frederick
General Counsel
THE STATE BAR OF GEORGIA
Atlanta, Georgia



Ellen McCarthy
Vice President, Senior Product Underwriter
and Risk Management Leader -
Lawyer's Professional Liability Program
SWISS RE CORPORATE SOLUTIONS
Severna Park, Maryland



Jaki Samuelson
WHITFIELD & EDDY LAW
Des Moines, Iowa



10:15 a.m. – 10:30 a.m. **BREAK**

10:30 a.m. – 11:30 a.m. **GROUP 1 BREAKOUTS** *Please choose one to attend.

PROFESSIONAL LIABILITY

Hot Topics

Professional liability claims and trends continue to evolve and expand both in complexity and severity. Our panel will discuss the significant developments so far in 2022 and decisions that are anticipated over the next several months. We will explore the emerging trends, sea changes, and hot topics in legal malpractice claims and claims against other professionals. We will offer practical insights on how to avoid and mitigate professional liability claims and develop defenses to the recently trending claims.



Jeff Hengeveld
Moderator
PLUNKETT COONEY
Bloomfield Hills, Michigan



George Fagan
LEAKE & ANDERSSON LLP
New Orleans, Louisiana

INSURANCE

Don't Do That! Common Mistakes That Lead to Litigation

Do you find that your insurance professionals are coming to you with confessions, like . . . "Oops I did it again." Or perhaps, even better, you learn of transgressions when a charge of bad faith or unfair and deceptive practices hits your desk? In this roundtable, we will identify and discuss common mistakes made every day by insurers which can lead to dissatisfied insureds, claimants and to legal trouble. We will identify typical mistakes and discuss best practices to avoid them.



Rick Shoultz
Moderator
LEWIS WAGNER, LLP
Indianapolis, Indiana



Susan Duff
Assistant General Counsel
TRANSAMERICA LIFE
INSURANCE COMPANY
St. Petersburg, Florida



Melissa Fernandez
Managing Counsel
Claim Legal
TRAVELERS
Hartford, Connecticut



Kathy Terry
PHILLIPS MURRAH P.C.
Oklahoma City, Oklahoma

11:30 a.m. – 11:45 a.m. **BREAK**

11:45 a.m. – 12:45 p.m. **GROUP 2 BREAKOUTS** *Please choose one to attend.

PROFESSIONAL LIABILITY

Defense Expert Witnesses in Medical Negligence Litigation: Finding, Retaining and Preparing Them— Best Pre-Trial Practices for Favorable Settlement or Trial Success

This panel will address the various aspects of the use of expert witnesses. Where to "find" experts, overuse versus unfamiliarity. Does the expert fit your case, avoiding Daubert challenges/ruinous cross examination? Retaining experts; defining the task, setting expectations and the risk of too little versus too much control. Controlling fees/costs without compromising strength of opinion. The expert's review: what do you send, what extrinsic research/analysis/testing/inspection does the expert do? The expert report/expert disclosures; avoiding problems. Coping when your expert's opinion is not helpful; strategies to minimize harm and salvage your case. The expert's deposition; preparing the expert and defending the expert's deposition.



Ralph Marchbank
Moderator
DICKINSON & GIBBONS, P.A.
Sarasota, Florida

Frank Bishop
Regional Claims Executive/
Vice President of Claims
PROASSURANCE
Orlando, Florida



Isa Squicciarini
AVP, Healthcare Unit
ALLIED WORLD
INSURANCE COMPANY
Farmington, Connecticut



Jay Davis
CLEMENT RIVERS, LLP
Charleston, South Carolina

INSURANCE

The High Art of Marijuana Insurance Coverage Issues

This panel will discuss employer obligation under the Responsible and Equitable Regulation of Adult-Use Cannabis (RERACA) & risk associated with insuring cannabis establishments. The panel will provide an overview of the law, provisions for employers and employees, exemptions, and the current landscape of state laws for medical and recreational marijuana across the country. Also included will be a review of potential implications on transportation insurance, products liability insurance, and insurance policy exclusions.



Jeff Gostyla
Moderator
HALLORAN SAGE
Hartford, Connecticut



Robert Hansen
Assistant GM of Cannabis, MA
COMMONWEALTH
ALTERNATIVE CARE/TILT
HOLDINGS
Providence, Rhode Island



Andrew Flynt
YOUNG MOORE AND
HENDERSON P.A.
Raleigh, North Carolina



Andrew Morin
HALLORAN SAGE
Hartford, Connecticut

12:45 p.m. – 1:45 p.m. **LUNCH**
The Stenton

1:45 p.m. – 2:45 p.m. **GROUP 3 BREAKOUTS** *Please choose one to attend.

PROFESSIONAL LIABILITY

Are You Mocking Me? Fun with Focus Groups and Mock Trial Madness

Hear from experienced claims professionals and some of ALFA's most prolific trial attorneys, about the latest tips, tricks, and meaningful-but- fun war stories related to focus group exercises and mock trials. Discuss and share ideas about creative and cost-effective formats and techniques, all designed to get meaningful data to prepare for trial and evaluate your risk, and a bang for your buck!



Dina Cox
Moderator
LEWIS WAGNER, LLP
Indianapolis, Indiana



Wendy Harris
Vice President of Claims
VGM INSURANCE SERVICES
Waterloo, Iowa



Mario Incollingo
SIU Team Manager
STATE FARM
Glenmoore, Pennsylvania



Alan Brown
MORRISON MAHONEY LLP
Boston, Massachusetts

INSURANCE

From Titian to Van Gogh: Brushstrokes of Insurance Coverage Issues

This session will discuss a variety of coverage and related issues that frequently confront insurers, including surplus lines policies with declining limits provisions, fraudulent and collusive settlements in underlying cases as impacting coverage, coverage issues arising from errors, omissions in applications for insurance, sexual abuse claims, and other current trends in the ever changing world of insurance coverage.



Amy Headrick
Moderator
BUTT THORNTON &
BAEHR PC
Albuquerque,
New Mexico



Patrick Carroll
Director, US - Casualty
Claims Consulting
AON
Garden City,
New Jersey



Jennifer Wojciechowski
Vice President-Operations
ALLIANT/COMMUNITY
ASSOCIATION
UNDERWRITERS
OF AMERICA
Newton, Pennsylvania



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



Katherine R. Woods
TAYLOR DAY LAW
Jacksonville, Florida

2:45 p.m. – 3:00 p.m. **BREAK**

3:00 p.m. – 4:00 p.m. **GROUP 4 BREAKOUTS** *Please choose one to attend.

PROFESSIONAL LIABILITY

Defending After Data Goes Down: The Perils and Pitfalls of Data Breaches

This panel will explore, in roundtable fashion, the brave new world of data breach litigation. In the last several years, the issues of standing (actual damages) and work product/attorney-client privilege (breach response reports) have featured prominently in data breach litigation. We will discuss those issues, as well as how to leverage them as defenses. We will also explore the more troubling recent trend in this litigation: the expanding pool of possible data breach defendants. As standards of care about protecting data have evolved, so, too have theories of recovery against those tasked with collecting, storing, and protecting third-party data. Directors & officers, law firms, insurance carriers, and others are finding themselves named as defendants in data breach cases. We will discuss the recent trends and cases, as well as best practices for avoiding becoming one of those defendants. Because the field is so active, round table discussion and anecdotal discussion will be encouraged.



Todd Lubben
Moderator
BROWN & JAMES, P.C.
St. Louis, Missouri



Dale Diamond
Claim Director
NAMIC INSURANCE
COMPANY, INC.
Indianapolis, Indiana



Renee J. Jent
*Certified Paralegal,
Claim Consultant*
COVERYS
East Lansing, Michigan



Kate Whitlock
HAWKINS PARNELL &
YOUNG, LLP
Atlanta, Georgia

INSURANCE

Fear and Loathing on the Witness Chair...Preparing Your Soul for Rule 30(b)(6) Depositions

The deposition of the insurer's 30(b)(6) witness is a pivotal event in any insurance litigation and demands appropriate preparation. This session will examine the benefits of a well-prepared and experienced witness to personalize the insurer, the costs of presenting an underprepared, nervous or evasive witness, and other related considerations. You will also hear tips and techniques to properly choose and prepare a company witness.



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



Shari Mattis
*Professional Liability
Claims Team Leader*
ESIS
Melville, New York



Doug Richmond
*Managing Director,
Professional Services Practice*
AON
Olathe, Kansas



Eric Eissenstat
PHILLIPS
MURRAH P.C.
Oklahoma City, Oklahoma

4:00 p.m.

Adjournment

4:30 p.m. – 5:30 p.m.

WOMEN'S INITIATIVE RECEPTION

The Stenton Terrace

Women Supporting Women

Join the ALFA International Women's Initiative group in giving back to women in the community. Join us in partnering with a local charity to put together packages of essential items to help women in need rebuild their lives. We hope to see you there!



Ellen Nimaroff
Women's Initiative Liaison
LESTER SCHWAB KATZ
& DWYER, LLP
New York, New York



6:30 p.m. – 9:30 p.m.

OFFSITE RECEPTION & DINNER BUFFET

The Barnes Foundation

2025 Benjamin Franklin Parkway

Enjoy a short walk to this evening's off-site dinner at the Barnes Foundation, Philadelphia's home of impressionist and early modernist works. Upon arrival at the museum, you will have an opportunity to explore the Collection before moving to the Terrace for cocktails and conversation. Tonight's buffet dinner will be served in the Annenberg Court.

*The Barnes Foundation is located a short 6-minute walk directly across Logan Square. Walking maps will be provided on-site.

Friday, June 24

6:30 a.m. – 7:30 a.m.

Wellness Worldwide – Workout

As part of ALFA's commitment to wellness, join fellow attendees for a "Rocky-inspired" workout, complete with a run (or walk) up the Philadelphia Museum of Art steps and a victorious photo at the summit!

8:00 a.m. – 9:00 a.m.

BREAKFAST

The Stenton

9:00 a.m. – 12:00 p.m.

PROGRAM SESSIONS

Ballroom & Mount Vernon

9:00 a.m. – 10:15 a.m. **ROUNDTABLE DISCUSSIONS** *PLEASE CHOOSE ONE TO ATTEND.

PROFESSIONAL LIABILITY

Jury Verdict Trends in the Midst of a Pandemic

Before the pandemic, jury verdicts were already trending upwards, often surpassing traditional expectations. Additionally, COVID has caused many businesses to change operational standards and, in many instances, has negatively affected the popular opinion of corporations. The question now arises: what is the correlation between COVID and the current trend of jury verdicts? Join us in this discussion as we analyze and explore this recent phenomenon in our industry.



Andre Webb
Moderator
GERMAN, GALLAGHER & MURTAGH, P.C.
Philadelphia, Pennsylvania

INSURANCE

Avant-Garde—You Be the Critic

Come join our roundtable where we will explore the emerging insurance landscape and sketch a portrait of recent developments. This dynamic session is an opportunity to offer your own perspective, and to explore the contours and patterns of recent decisions and legal developments.



Lisa Mickley
Moderator
HALL & EVANS, LLC
Denver, Colorado



Mohammad Iqbal
Vice President
MARSH CLAIMS SOLUTIONS
Seattle, Washington



Nicole Nowlin
COSGRAVE VERGEEER
KESTER LLP
Portland, Oregon

10:15 a.m. – 10:30 a.m.

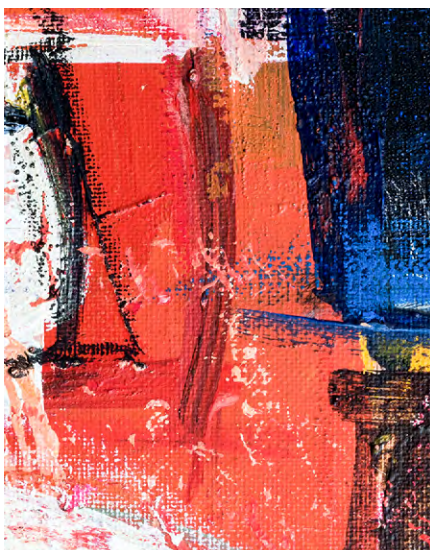
BREAK

10:30 a.m. – 10:45 a.m.

What’s Happening at ALFAI HQ



Jessica Zaroski Bauer
Chief Executive Officer
 ALFA INTERNATIONAL
 Chicago, Illinois



10:45 a.m. – 11:45 a.m.

INSURANCE GENERAL SESSION

The Evolution of Coverage for Cyber Events: Creative Attempts by Insureds to Secure Coverage Beyond Coverage Dedicated to Cyber Security or Data Privacy

As cyber liability claims continue to grow at an alarming rate each year, companies are coming to understand that they need to prepare for when, and not if, they will face a cyber attack or lapse in cyber security. Even so, many companies are securing only limited, if any, coverage that is specifically dedicated to cyber security or data privacy. As a result, when these companies ultimately face a cyber event, they are turning to other policy provisions with creative arguments to fit cyber security or data privacy within their standing policy. This panel of seasoned professionals will tackle the questions of what creative arguments are out there and how carriers should respond.



Teresa Young
Moderator
 BROWN & JAMES, P.C.
 St. Louis, Missouri



David Standish
Vice President -- Cyber, Tech E&O and MPL Claims
 IRONSHORE/LIBERTY MUTUAL INSURANCE
 New York, New York



Glenn Fischer
Director & Sr. Counsel, Complex Claims
 MARKEL SERVICE, INCORPORATED
 Rosemount, Illinois



Alex Tilling
LEAKE & ANDERSSON, L.L.P.
 New Orleans, Louisiana

11:45 a.m. – 12:00 p.m.

Closing Remarks



Richard Hennessey
Insurance Program Co-Chair, 2022 Insurance & Professional Liability Seminar
 MORRISON MAHONEY LLP
 Boston, Massachusetts



Jacob Lehman
Professional Liability Program Co-Chair, 2022 Insurance & Professional Liability Seminar
 GERMAN, GALLAGHER & MURTAGH, P.C.
 Philadelphia, Pennsylvania

FACULTY BIOS

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 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 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.

For 14 years in private practice, **ED BEITZ** defended healthcare professionals against claims of medical malpractice in Pennsylvania

and New Jersey. His work included defending doctors, nurses, physician assistants and hospitals in cases involving complex issues of the human anatomy, such as cardiac surgery, neurosurgery, orthopedic surgery, nursing care, obstetrical complications, nerve injury and vascular injury. Ed secured numerous defense verdicts at trial and arbitration of these claims. Ed also handled insurance coverage matters, including high-exposure claims against excess insurers and underinsured defendants in catastrophic injury matters. In the Fall of 2021, Ed accepted an offer to join the in-house counsel team with the Geisinger Health System, which provides health services to over 3 million

patients in 45 counties throughout central, south-central and northeastern Pennsylvania. Ed still handles medical malpractice claims, but also advises and litigates in myriad other aspects of health law. Ed is a frequent speaker at national conferences on litigation issues in healthcare. He has also written and developed articles and presentations on emerging issues in medical malpractice, such as the increased relevance of electronic medical records in the context of civil litigation.

BRIAN BEVERLY, a shareholder at ALFA International member firm Young Moore and Henderson P.A. in Raleigh, North Carolina, devotes a significant portion of his practice to insurance coverage litigation and analysis, insurance bad faith and extra-contractual litigation, and insurance regulatory matters. Brian has litigated cases to verdict in many state and federal courts in North Carolina and has handled appeals in both state and federal appellate courts. Brian has been a local bar president, and served as president of the North Carolina Association of Defense Attorneys. He is a member of the American Board of Trial Advocates, the American Academy of Trial Lawyers and the International Society of Barristers. He holds an AV Peer Review Rating from Martindale-Hubbell. Brian's hobbies include traveling, college and professional sports and sailing.

ALAN E. BROWN is a partner in the Boston office of the ALFA International member firm, Morrison Mahoney LLP, where he specializes in the defense of non-medical professionals (including lawyers, accountants, real estate brokers, appraisers, home inspectors, insurance agents and others) in civil lawsuits and disciplinary matters. Prior to joining Morrison Mahoney LLP in 2006, he served for five years in the Office of the Bar Counsel at the Massachusetts Board of Bar Overseers where he investigated and assisted in the prosecution of attorney misconduct cases.

G. FRANKLIN (FRANK) BISHOP III is a Regional Claims Executive/Vice President of Claims for ProAssurance Companies, the fourth largest Medical Professional Liability Company in the United States. He is responsible for overseeing the management of ProAssurance and NORCAL

medical professional liability claims in the Southeast United States, as well as all ProAssurance Senior Care and allied services claims throughout the Country. Prior to joining ProAssurance, Frank was a medical malpractice defense attorney for 22 years, trying cases throughout Florida, as well as arguing appeals in the Appellate Courts and Florida Supreme Court. Frank is a graduate of Florida State University and Stetson University College of Law. He is a member of the Florida Bar and U.S District Court for Middle District of Florida. Frank also spent 12 years in the U.S. Navy/Naval Reserves.

PATRICK CARROLL leads an elite team of senior consultants located throughout the USA. The responsibility of this team impacts Aon client's cost of risk in two ways – firstly through the design and implementation of a results-based program, and secondly through advocacy in the event of specific claims, or a situation in which we need to maximize the return on the client's investment in insurance, or a claims service provider, all focused on the client's business goals.

DINA M. COX is a partner with ALFA International member firm, Lewis Wagner, in Indianapolis, Indiana and was the Program Chair for the 2021 International Client Seminar. Dina is a legal strategist and trial attorney who honors responsive client service as a top priority. She has served as lead counsel in numerous lawsuits and bet-the-company litigation involving multi-million-dollar claims ranging from breach of contract, false advertising, unfair competition, unfair commercial practices, consumer fraud, and breach of warranty to claims of serious injury caused by products liability and professional negligence. Dina is an aggressive yet civil trial lawyer who has significant jury trial experience in state and federal courts and substantial appellate experience. Dina defends mass torts, class actions, government enforcement actions, drug and medical device cases, toxic tort and chemical exposure cases, and professional liability lawsuits including legal malpractice. Dina also counsels clients during government investigations and assists professionals facing disciplinary grievances and licensing issues. Dina's mass tort and

class action defense work is national in scope and has included lawsuits filed in numerous states from New York to California as well as lawsuits consolidated as part of multi-district litigation. Dina is a regular faculty member for the National Institute of Trial Advocacy in its learn-by-doing trial advocacy courses and a frequent speaker on product and professional liability topics.

D. JAY DAVIS, JR. is a partner with Clement Rivers, LLP, the ALFA International member firm in Charleston, SC. Jay is chair of the firm's Professional and Medical Liability practice groups and the firm's Business Litigation practice group. Jay is a Fellow in the American College of Trial Lawyers®. Jay is rated AV® Preeminent Peer Review Rated Judicial of Martindale Hubbell. Jay has also been selected as a member of Super Lawyers® in the areas of Professional Liability defense and Best Lawyers in America® for commercial litigation. Jay is also a member of the American Board of Trial Advocates ("ABOTA"). Jay grew up in Charleston and earned a Master's Degree from the University of South Carolina in 1993. Jay then graduated cum laude from the University of South Carolina School of Law, where he was also an associate editor of the South Carolina Law Review.

DALE DIAMOND is a J.D. and Registered Professional Liability Underwriter with more than 30 years of experience in the insurance industry. He practiced at a prestigious Chicago law firm as an appellate, insurance coverage and bad faith defense lawyer. Dale has also handled complex professional liability, employment practices, D&O and cyber liability claims, in addition to managing teams of claim professionals. He has also served as a professional liability and EPLI Product Line Leader and Regional Underwriting Director, responsible for the overall underwriting profitability of multimillion-dollar books of business. Dale is currently Claim Director for NAMIC Insurance Company, Inc. (NAMICO), an insurance company owned by the National Association of Mutual Insurance Companies and its members.

SUSAN DUFF is an Assistant General Counsel at Transamerica Life Insurance

Company, where she manages a variety of litigation involving Transamerica products and distribution. Her practice focuses on life insurance and securities litigation. Prior to joining Transamerica in 2006, she handled eminent domain litigation in the Florida Attorney General's office and was a partner in a Florida firm where she specialized in professional liability defense.

ERIC EISSENSTAT is an accomplished trial attorney with a demonstrated record of success in the courtroom and boardroom. Having tried over 50+ jury trials to verdict, Eric most recently served as Sr. Vice-President, General Counsel, Chief Risk Officer & Secretary for Continental Resources, Inc. (CLR-NYSE) for over a decade. Eric's litigation experience in federal and state courts includes landmark, novel, and impact litigation and extensive experience in appellate arguments and SCOTUS filings. Eric has obtained numerous multi-million-dollar verdicts representing plaintiffs and numerous defense verdicts in cases seeking millions and tens of millions of dollars and has extensive experience in handling insurance bad faith and extracontractual litigation as well as agency matters and class actions. He has served on dozens of bar association, business, leadership, and civic boards and committees, and has been recognized with numerous service awards and honors and is a Fellow with The Litigation Counsel of America. He enjoys traveling, cycling, and spending time with his wife of 38 years, Sandy.

GEORGE FAGAN is a founding partner of Leake & Andersson LLP, and is that Firm's practice group leader for insurance coverage litigation and consultation, including matters involving bad faith, CGL, construction defects, disability, EPL, errors and omissions, executive liability/D&O, life and health, professional liability and property litigation. George was recognized with the ALFA 2011 Nathan Fishbach Service Award for his outstanding individual contributions and leadership to ALFA. He is a past Chair of the ALFA Insurance Practice Group, and has served on ALFA's Board of Directors, Executive Committee and several other committees. George graduated from Washington &

Lee University with Honors in 1981, and received his law degree from Louisiana State University Law School in 1984. George lives in New Orleans with his wife, son and daughter, and still plays guitar in a rock n' roll band with some very good friends.

MELISSA FERNANDEZ is Managing Counsel in Travelers Claim Legal Liability Group, and manages a team of attorneys who provide coverage advice, litigation management and other legal services to Travelers complex claim professionals. She earned an A.B. in Psychology, summa cum laude, from Princeton University in June 2004. Melissa is also a 2007 graduate of New York University School of Law, and was an Articles Editor for NYU's Journal of Legislation and Public Policy. Melissa began her legal career at the firm of Cleary Gottlieb Steen & Hamilton, LLP in New York as an associate in the firm's Capital Markets and Litigation Groups. She then clerked for the Honorable Vanessa L. Bryant, United States District Court Judge, District of Connecticut. Melissa joined the Stamford, Connecticut office of Wiggin & Dana upon completion of her clerkship, where she focused her practice on a broad spectrum of civil litigation and was a member of the firm's Insurance and White Collar Practice Groups.

GLENN FISCHER is Director & Sr. Counsel, Complex Claims, at Markel Service, Incorporated. He is responsible for matters of high exposure and complexity involving professional liability risks faced by lawyers, healthcare practitioners, IT professionals/cyber, architects and engineers, accountants and other miscellaneous professional risks. Glenn came to Markel in 2008 from private law practice, having received his JD cum laude in 1994 from the University of Illinois Chicago School of Law, where he was a member of the Law Review and ISBA Moot Court team.

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 first-party 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.

PAULA FREDERICK is General Counsel for the State Bar of Georgia, a unified bar organization with over 52,000 members. As General Counsel, Paula is responsible for interpreting the ethics rules for lawyers, prosecuting lawyer discipline cases, and providing legal advice to the officers and directors of the organization. She has served in the Office of the General Counsel for 33 years and was Deputy General Counsel for Discipline before becoming General Counsel in 2009. Paula is a 1982 graduate of the Vanderbilt University School of Law and a 1979 graduate of Duke University. Prior to joining the Office of the General Counsel, she spent six years as a staff attorney with the Atlanta Legal Aid Society handling civil legal matters for low-income people. Paula is a Past President of both the Atlanta Bar Association and the Georgia Association of Black Women Attorneys. She is also an active member of the American Bar Association, where she serves in the House of Delegates. She is Chair of the Coordinating Council of the ABA Center for Professional Responsibility and recently chaired the Standing Committee on Professional Regulation. In the past, she served on the Commission on the Future of Legal Services, chaired the Standing Committee on Ethics and Professional Responsibility and the ABA Diversity Center, and served as a member of the Board of Governors.

As Managing Partner of Halloran Sage, ALFA International's member firm in Connecticut, **JEFFREY GOSTYLA** is dedicated to the firm's tradition of excellence. He is focused on providing outstanding service to all of the firm's clients, and to developing sound strategies and policies that support this goal. Jeff has over twenty years of litigation experience in the state and federal courts in a broad range of practice areas, including

insurance law, probate litigation, commercial law, and criminal defense. Jeff is dedicated to representing insurance company clients in a wide array of matters, including insurance coverage and bad faith litigation, ERISA actions, fraud investigations, professional liability matters, litigation of property and other first-party coverage matters, and litigation of third-party insurance coverage issues. He uses every tool available to bring about positive resolutions, and has served as an arbitrator and mediator in insurance coverage disputes. Jeff has also handled many high-profile and often contentious probate litigation matters, including probate appeals in the Superior Court. Jeff's passion for his vocation is evident through his professional memberships and community associations. He is a member of the American Bar Association, Connecticut Bar Association, Hartford County Bar Association and is a past president of the New Britain Bar Association. He is also the Past President of the Hartford Chapter of the Villanova University Alumni Association. Jeff was born and raised in Central Connecticut and he has proudly served on many volunteer boards and associations, including: St. John's Church (2013-2016); New Britain YWCA Board of Trustees; Corporator – YMCA of New Britain; Shuttle Meadow Country Club Board of Directors (2012-2015) and the Timberlin Golf Club Board of Directors (President: 1996-2005). Jeff has been honored with the Connecticut Law Tribune's New Leaders in the Law award, which recognizes attorneys admitted to the Bar for ten years or less who have made important contributions to their profession and their communities. He has also been recognized by Super Lawyers® in the area of Insurance Law for twelve of the last fifteen years. Jeff has been featured in several area and industry publications following the firm's announcement that he is the fifth managing partner in Halloran Sage's history. Jeff earned his JD from the Quinnipiac University School Law and his BA from Villanova University.

ROBERT HANSEN has worked in the regulated cannabis industry since 2016. Robert's journey in cannabis began in Denver, Colorado, where he helped open

and operate one of the largest licensed cannabis cultivation facilities in the State of Colorado. Over the past six years, Robert has helped open four large scale Medical and/or Adult-Use Cultivation Facilities, six Medical and/or Adult-Use Dispensaries, and one Medical Processing Lab in multiple states, including Colorado, Maryland, Pennsylvania, Arkansas, and Virginia. Robert's primary focus and involvement has been in Compliance. During the first four years in the cannabis industry, Robert oversaw the Compliance Department for Next Big Crop, a subsidiary management company under General Cannabis Holdings. Robert was responsible for ensuring all cultivation, distribution, and manufacturing facilities within Next Big Crop's portfolio were operating in compliance with all state and local ordinances, rules, and regulations. Robert currently serves as the Assistant GM of Cannabis, MA for Commonwealth Alternative Care (subsidiary company under TILT Holdings), a vertically integrated cannabis facility in Taunton, MA. For the first two years, Robert served as Compliance Director for Commonwealth Alternative Care. Robert has also helped form and operate CAC's Diversity Committee and Community Outreach Program.

WENDY HARRIS is the Vice President of Claims for VGM Insurance Services, an Iowa-based MGA. VGM provides specialty insurance programs to post-acute healthcare providers, including home medical equipment, home health and hospice, physical therapy, orthotics and prosthetics, medical manufacturer reps and distributors as well as allied healthcare providers. Wendy was previously a senior claims specialist for Pharmacists Mutual Insurance Company, an Iowa-based specialty carrier insuring pharmacists, dentists, home medical equipment providers, home healthcare providers and other healthcare professionals in 49 states. Wendy was with Pharmacists Mutual for 10 years. Prior to joining Pharmacists Mutual, Wendy had worked for 14 years as a medical malpractice claims specialist for other Midwest-based professional liability carriers. Prior to working on the insurance defense side, she had worked nine years as

a litigation assistant in a plaintiff personal injury/medical malpractice law firm.

AMY HEADRICK is a shareholder of Butt Thornton & Baehr PC, the ALFA International firm in Albuquerque, New Mexico. Amy represents insurers in coverage matters and bad faith litigation, as well as practicing in general insurance defense. Amy grew up in the Great Lakes region and lived in various parts of the country until settling down in New Mexico in 2002. In 1991, Amy received her bachelor's degree in Political Science from The University of Michigan in Ann Arbor. After graduation, she spent two years in Japan, where she studied Japanese language, history, and culture while working for Biwako-Kisen. In 1998, Amy graduated magna cum laude from Tulane University School of Law, receiving the distinction of Order of the Coif and the Lemle Kelleher award for the top graduate in the Admiralty Program. While in law school, Amy served on the Maritime Law Journal and was on the Appellate Law Clinic. She is admitted to the New Mexico state courts, the New Mexico Federal District Court and the Tenth Circuit Court of Appeals.

JEFFREY S. HENGEVELD is a shareholder in the Bloomfield Hills, Michigan, office of ALFA International member firm, Plunkett Cooney, and is a member of the firm's Board of Directors. He is a trial attorney who focuses his practice primarily in the area of professional liability and consumer litigation. He serves as Co-Leader of the firm's Professional Liability Practice Group and regularly defends attorneys, accountants, and other professionals in malpractice actions. He also regularly advises attorneys and accountants on ethical issues and licensing matters, including answering a legal and ethical hotline for the Michigan Association of Certified Public Accountants. He is a published author on the issue of accounting standards and fraud deterrence and on professional liability insurance coverage. He was awarded an AV-rating from Martindale-Hubbell and named a Top Lawyer in Legal Malpractice Law by *dbusiness Magazine* and a "Rising Star" by Michigan Super Lawyers. He received his B.A. from Michigan State University and his J.D. magna cum laude from

Michigan State University College of Law, where he was a member of the Law Review.

RICHARD HENNESSEY is an associate 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.

Residing in Chester County, Pennsylvania, **MARIO INCOLLINGO** is a 30-year employee of State Farm Insurance Company currently in the role of Section Manager. His career is centered on Claims Operations, including 20+ years of experience in State Farm's Special Investigations Department, where he gained significant complex litigation experience at both the State and Federal level. Mario has spent the last four years leading a section in State Farm's Fire Casualty operation with responsibilities in 14 jurisdictions. He is a married, father of four between the ages of 14 and 22, which he feels may require the need to work another 30 years.

MOHAMMAD IQBAL has been Vice President in Marsh's Claims Solutions Group since 2019, where his primary responsibility is to provide Marsh clients with effective claim advocacy across a wide range of coverages. Mohammad began his career in the insurance industry with Travelers Insurance as an Associate Account Executive handling toxic tort claims. Following Travelers, Mohammad then transitioned to Gallagher as a Claims Manager, where he advocated for many national and regional clients. Mohammad received his BBA, magna cum laude from Texas A&M University and his JD from South Texas College of Law. Mohammad is also a licensed Texas attorney and licensed P&C producer/adjuster in Washington.

RENEE J. JENT is a Certified Paralegal who serves as a Claim Consultant in East Lansing, Michigan with Coverys. Renee draws from her litigation work within law firms, the court system for inter-agency child support enforcement, and claims handling for professional liability insureds. It has been a privilege to assist in the defense of lawyers and healthcare providers for many years throughout the United States. Renee's management of claims ranges from simple to complex litigation involving multiparty and multi-jurisdictional cases, professional licensing investigations, and coverage analysis. Current work through specialty, primary, and excess lines of insurance for healthcare providers has focused in the states of Indiana and Michigan. Renee is a proud graduate of Lake Superior State University in the historic city of Sault Sainte Marie, Michigan (Go Lakers!). She has held public office and served on many nonprofit, municipal, academic-advisory, and professional boards. Renee is the recipient of an Affiliates Award through the National Association of Legal Assistants (NALA) in 2004. She received a "Shining Star" award through the Paralegal/Legal Assistant Section of the State Bar of Michigan in 2014. From 2012-2013, Renee completed the Leadership Education and Preparation, (LEAP) program with a team of colleagues representing four different states to prepare a live competitive group presentation to a committee at the annual NALA conference. A decade later, that novel experience of working live through technology to form new relationships with four strangers was very beneficial preparation for the way we now connect in 2022.

JACOB LEHMAN is a trial lawyer and partner with ALFA International member firm, German, Gallagher & Murtagh P.C., in Philadelphia, Pennsylvania. He focuses his practice on complex civil litigation splitting his time between claims of professional negligence, product liability, and other matters involving catastrophic injury. He also has a significant commercial litigation practice. Jake's focus is on creativity, aggressive advocacy, and most of all client service. He is a 2006 graduate of Temple University and completed his

law degree at Rutgers University School of Law in 2009. In 2017, he obtained an LLM in trial advocacy with honors from Temple University's nationally ranked trial advocacy program. He is an active member of the Pennsylvania and Philadelphia Bar Associations and the Temple American Inn of Court. He writes and presents on legal topics in various venues and publications. Jake has been honored by his peers including selection in 2016 as one of 35 "Lawyers on the Fast Track" by the Philadelphia Legal Intelligencer and by repeated inclusion in Law & Politics Magazine as a Super Lawyer: Rising Star, a distinction given to only 2.5% of Pennsylvania Attorneys under 40.

TODD LUBBEN is a partner with ALFA International member firm, Brown & James, P.C., in St. Louis, Missouri. As part of his professional liability practice, Todd has successfully defended attorneys who are facing legal malpractice lawsuits and ethics complaints initiated by former clients. He has also represented businesses in various types of contract, employment, and intellectual property disputes. He was listed in Missouri Super Lawyers as a Rising Star in business litigation and professional liability and received the 2011 Up & Coming Award from Missouri Lawyers Weekly.

RALPH L. MARCHBANK, JR. is a 30 plus year partner at the ALFA International firm of Dickinson & Gibbons, P.A. in Sarasota, Florida. His practice areas include medical negligence and legal malpractice defense; products liability; auto and trucking liability; premise liability; and insurance coverage litigation. He has tried well over 100 jury trials, including medical negligence and legal malpractice claims. Ralph is a past President of the Florida Defense Lawyers Association and a member of the American Board of Trial Advocates (past Florida Bar representative); the International Association of Defense Counsel; DRI; the American Bar Association; past Master of the Sarasota County Chapter of the American Inns of Court; and involved in other professional organizations. He graduated from the University of Florida College of Law in 1980.

CHRISTINE L. MAST is managing partner of the defense litigation firm of Hawkins Parnell & Young, LLP, the ALFA International member firm in Atlanta, GA. She is also chair of ALFA International's Professional Liability Practice Group. Christine is the go-to attorney for legal professionals faced with malpractice claims, lawsuits, disciplinary, and ethics issues. A testament to her skillful, pragmatic handling of serious and sensitive claims, she is regularly hired by opposing counsel when they find themselves on the wrong end of a claim. Outside of the courtroom, Christine defends clients against sanctions, licensing, and disciplinary matters. Christine also represents insurance agents and brokers, appraisers, surveyors, and other professionals. Her successful representation is evident in a long list of appellate decisions affirming favorable rulings for her clients, including landmark cases before the Supreme Court of Georgia. Christine was named one of Georgia's top 100 lawyers in 2019, 2020, and 2021 by Super Lawyers and was selected by Best Lawyers as Lawyer of the Year for Professional Malpractice Law Defendants in 2021 and Legal Malpractice Defendants in 2015. She lectures and writes regularly on professional liability, malpractice avoidance, ethics, abusive litigation, and trial procedures.

SHARI MATTIS has over 15 years in the insurance industry, and currently leads a team of experienced professionals who manage professional liability claims, including medical malpractice, cyber, employment liability, D&O and E&O claims. Prior to joining Esis ProClaim, Ms. Mattis managed a diverse set of primary and excess Professional Liability Claims for a third-party administrator, and both large and small international carriers. She is a licensed adjuster in over 20 states, and received her designation as a certified claims professional in cyber liability. While in law school, Ms. Mattis clerked for a firm specializing in insurance defense. Ms. Mattis earned her B.A. in English from Hofstra University, with honors, and her J.D. from Hofstra University School of Law.

ELLEN MCCARTHY is a Vice President, Senior Product Underwriter and Risk Management Leader for the Lawyer's Professional Liability

program with Swiss Re Corporate Solutions. Prior to her current role, Ellen served as a claims expert adjudicating complex legal malpractice and insurance agent E&O claims across the US, and as an underwriter for the LPL program. Ellen is a licensed Maryland attorney and former associate at an insurance defense firm in suburban Washington, DC. Ellen has also served as a judicial law clerk and claims team leader. She holds CPCU and RPLU designations.

LISA MICKLEY is a member of Hall & Evans, LLC, the ALFA International member firm in Denver, CO, where her practice is dedicated primarily to coverage advice and bad faith litigation involving a wide variety of coverages, including both commercial and professional lines. Lisa enjoys working closely with her clients to identify and address coverage concerns and to develop successful strategies in litigation. She strives to develop long-term working relationships with her clients to be a valuable resource. Lisa is currently serving as the Chair Emeritus of the ALFA International Insurance Practice Group. She is licensed in Colorado and Texas and practices in both state and federal courts. Lisa also serves on the board of the Center for Legal Inclusiveness, where she dedicates her energies to tackling the challenges of diversity in the legal profession.

TINA MILLER has over 30 years of human resource experience, and has been in a leadership role at Mainscape since 2007. Tina is an accomplished human resources professional and is committed to building strong relationships and empowering people. She has extensive knowledge in recruitment, relations, development, training, compensation, diversity, ethics, HR compliance, benefits and claims. Tina is also Mainscape's Chief Ethics & Compliance Officer, and she has successfully managed a 60% growth in employee count over the past 12 years. Her biggest motivation in her current role is working with new and tenured employees and coaching them towards success. Simply stated, "People." Tina enjoys spending time with family and friends, traveling to tropical places, and hiking in the mountains.

ANDREW MORIN is an associate with Halloran Sage, the ALFA International firm in Connecticut. Andrew focuses his practice in the areas of municipal law, land use, and environmental law. He is a member of the legal team that handles matters for more than half of Connecticut's 169 towns and cities, as well as numerous national, regional, and private companies. Most recently, he compiled legal articles regarding the Regulations and Rules Pertaining to the Adult Use of Cannabis and the OSHA Vaccination and Testing Program. Andrew was a law clerk with Halloran Sage prior to earning his JD. While in law school, he served as a Judicial Extern for the Honorable Diane Finkle with the United States Bankruptcy Court for the District of Rhode Island. He was also a Rhode Island Sea Grant Law Fellow, drafting comprehensive research memorandums with the Senior Staff Attorney addressing maritime law matters. He also interned with the Appellate Unit of the Rhode Island Office of the Attorney General. Prior to law school, Andrew worked as an Environmental Planner with a Hartford land surveying firm, assisting in delineating wetlands, watercourses, and other natural features. Andrew received his JD from the Roger Williams University School of Law and his BA from the University of Rhode Island.

ELLEN NIMAROFF is from the New York, New York ALFA law firm of Lester Schwab Katz & Dwyer, LLP. Her practice is focused on the areas of insurance brokers and agents errors & omissions, insurance coverage and professional liability. She represents insurance agents and brokers in New York and New Jersey in both state and federal courts in complex errors & omissions litigation and claims. She also represents insurance agents and brokers at administrative proceedings before the New York State Insurance Department, State Insurance Fund and Worker's Compensation Board. She represents national insurers in complex insurance coverage disputes. She analyzes insurance coverage issues, renders opinions for insurers and defends and prosecutes declaratory judgment actions. She received her BA degree from Wellesley College and her JD from Brooklyn Law School.

NICOLE NOWLIN is a partner with Cosgrave Vergeer Kester LLP, the ALFA International member firm in Portland, Oregon. Nicole currently serves on the steering committee for ALFA's Insurance Practice Group. Her practice focuses on representing insurers in insurance coverage disputes and defending individuals and business in a broad range of litigation matters in the state and federal courts of Oregon, including personal injury and professional liability cases. She is a graduate of Linfield College and Willamette University College of Law and is licensed in Oregon and California. In addition to her coverage and litigation practice, Nicole serves as an arbitrator in Portland and surrounding counties through Oregon's mandatory arbitration program and on uninsured motorist (UM) and underinsured motorist (UIM) binding arbitration panels. She is the former Chair of her local bar association's Equality and Diversity Committee, and she mentors new lawyers through the Oregon State Bar's New Lawyer Mentor program. Nicole has been recognized as a "Rising Star" for insurance coverage in Oregon SuperLawyers.

KEVIN OWENS is an equity shareholder in the ALFA International Chicago member law firm of Johnson & Bell, Ltd., and is co-chair of the firm's Product Liability Practice Group. His trial practice includes the defense of catastrophic injury, consumer, industrial, medical device, and other product liability actions, construction and general negligence actions, and the litigation of commercial disputes in state and federal courts. His experience also includes the defense of construction product defect actions, and litigation of contract actions at law and equity. He is also a certified mediator, having completed intensive mediation training and certification through Chicago's prestigious Center for Conflict Resolution. As a complex case mediator, Mr. Owens focuses his mediation practice on civil and commercial disputes involving product liability, complex and catastrophic injury cases, and construction matters. He is a graduate of Marquette University and DePaul University College of Law. Mr. Owens is past Chairman of ALFA International's Product Liability and Complex Litigation Practice

Group, and is presently a member of its Steering Committee. He is also currently Chair of the ALFA International Board of Directors.

DOUG RICHMOND is Managing Director of Aon's Professional Services Practice. Aon is the world's leading broker of insurance for law firms. Doug consults with Aon's 275+ law firm clients on professional responsibility and liability issues, and additionally leads Aon's loss prevention efforts for all professions. Before joining Aon, Doug was a partner with Armstrong Teasdale LLP in Kansas City, Missouri (1989-2004), where he had a national trial and appellate practice. In his time at Armstrong Teasdale, he tried over 40 major cases as "first chair" and was often engaged to handle appeals of cases tried by other lawyers. In 1998, he was named the nation's top defense lawyer in an insurance industry poll as reported in the publications *Inside Litigation* and *Of Counsel*. He is a member of the ABA's Standing Committee on Lawyers' Professional Liability and previously was a member of the ABA's Standing Committee on Ethics & Professional Responsibility. He is also a member of the American Bar Foundation, American Law Institute (ALI), American Board of Trial Advocates (ABOTA), International Association of Defense Counsel (IADC), and Federation of Defense and Corporate Counsel (FDCC). In the ALI, he was an Adviser for the Restatement of the Law of Liability Insurance and the Principles of the Law, Compliance, Enforcement, and Risk Management for Corporations, Nonprofits, and Other Organizations. Doug has also been selected to *The Best Lawyers in America* in the areas of legal malpractice, personal injury litigation, and railroad law. In 2003, the Euromoney Legal Media Group named him as one of the nation's top insurance and reinsurance lawyers. Doug is the lead author of the book *Professional Responsibility in Litigation* (3d ed. 2021), and the co-author of an insurance law treatise, *Understanding Insurance Law* (6th ed. 2018) and an insurance law casebook, *Cases and Materials on Insurance Law* (8th ed. 2018). He is also a named editor of the *New Appleman Insurance Law Practice Guide*. He has published more than 90 articles in university law reviews, and many more articles in other scholarly and professional

journals. Doug teaches Legal Ethics at the Northwestern University School of Law, a seminar on Legal Malpractice Law at the Texas A&M University School of Law, and Insurance Law and a seminar on Liability Insurance Law and Legal Malpractice Law at the University of Florida College of Law. Doug is also a NITA faculty member, teaching both deposition and trial skills. Doug earned his J.D. at the University of Kansas, an M. Ed. from the University of Nebraska, and his B.S. from Fort Hays State University.

JAKI SAMUELSON is a member of Whitfield & Eddy Law, the ALFA International member firm in Des Moines, Iowa. Her practice focuses on employment law, including both client counseling and litigation. She has served as President of the Iowa Academy of Trial Lawyers, the Iowa Defense Counsel Association, and the Iowa Organization of Women Attorneys. She has been recognized as a leading employment lawyer by Chambers USA, Best Lawyers in America, and Great Plains Super Lawyers. She received her bachelor's degree from Bradley University and her J.D. from the University of Iowa College of Law.

MARCIE SCHOUT is a shareholder at 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).

RICHARD SHOULTZ is a partner at Lewis Wagner LLP, the ALFA International firm in Indianapolis, IN. There he focuses his practice on representing clients in the areas of fire loss, construction, product liability, insurance, and commercial litigation, along with serving as a mediator. He also spends considerable time

assisting clients in the analysis and litigation of insurance coverage questions relating to commercial general liability, automobile, property, and homeowners policies, including claims relating to breach of the insurer's duty of good faith. He is a 1987 graduate of Hanover College and received his law degree from Indiana University Robert H. McKinney School of Law in 1990. Rick is a member of the International Association of Defense Counsel, DRI, the American Bar Association, Indiana Bar Association, and the Indianapolis Bar Association. He is currently on the Board of Directors of the Defense Trial Counsel of Indiana and has been selected as an Indiana Super Lawyer for the years of 2010 to the present and included in The Best Lawyers of America in the field of Insurance Law for 2013 to the present. In his spare time, he enjoys playing softball, following his favorite sports teams, studying the Civil War, and traveling with his family.

ISA SQUICCIARINI began at Allied World in July 2018 as a Sr. Claims Analyst in the Healthcare Medical Malpractice Unit. She is currently an AVP, responsible for investigating, evaluating, and resolving claims made against the Company's medical malpractice business including, hospital primary and excess, long-term care, and miscellaneous healthcare liability, including the management of litigation of these claims. Before joining Allied World, Isa spent nearly 20 years as an attorney at Carmody Torrance Sandak & Hennessey, a full-service Connecticut law firm, where she focused her practice on the defense of hospitals and physicians in complex, high exposure medical malpractice cases. Isa received a B.A. in Psychology from the College of the Holy Cross, and a Juris Doctorate from the University of Connecticut School of Law. She is currently pursuing her CPCU certification.

DAVID STANDISH is a Vice-President and has been a manager of the cyber, tech errors & omissions and media liability claims group at Ironshore/Liberty Mutual insurance since January 2019. Prior to Ironshore, he handled complex cyber, media and professional liability and kidnap/ ransom claims at AIG from 2011-2018. Prior

to AIG, he was worked in private practice at a medical malpractice defense firm from 2009-2011. He was a New Jersey trial court law clerk from 2008-2009. He has a J.D. from New York Law School and a B.A. from St. Peters University in Jersey City, NJ.

KATHY TERRY is a director with Phillips Murrah P.C., the ALFA International member firm in Oklahoma City, OK. Kathy's insurance coverage 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 recommendations and helps resolves questions of coverage between her clients and their insurance companies. Kathy's practice also includes third-party insurance defense, crisis management and bet the company litigation, employment law defense and civil rights work.

ALEX TILLING is a partner with the New Orleans ALFA International firm Leake & Andersson LLP. His insurance practice spans bad faith, construction defects, disability, EPL, errors and omissions, executive liability/D&O, life and health, casualty, occupational accident, professional liability and property litigation. He is also involved on 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 the 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.

ANDRE J. WEBB is an experienced trial attorney with a demonstrated history of success at ALFA International member

firm German, Gallagher & Murtagh, P.C. in Philadelphia, PA. Prior to joining GGM, Andre was Trial Counsel for a large Insurance Company where he handled a wide variety of cases, including premises liability, product liability, dram shop/liquor liability cases and motor vehicle accidents, including UM/ UIM claims. Andre has considerable jury trial experience in both state and federal courts. The diverse nature of Andre's practice provides him with a unique perspective when advising and counseling clients towards attaining the best and most cost-effective resolution. Andre's professional activities extend beyond the courtroom as he is very active in the legal community. Andre is an elected member of the Philadelphia Bar Association's Board of Governors; he also serves as Chair of the Executive Committee of the Young Lawyers Division ("YLD") and is an Executive Committee member of the Philadelphia Association of Defense Counsel ("PADC"). Andre is also active with the Pennsylvania Bar Association, where he serves in the House of Delegates.

KATE WHITLOCK is a senior partner with Hawkins Parnell & Young, LLP, the ALFA International member firm in Atlanta, GA. Kate has spent her entire career defending people accused of not doing their jobs right. Whatever the accusation, Kate has the defendant's back. She works tirelessly to untangle complicated issues to protect the reputations and livelihoods of her clients, so they can get back to what they do best – their work. A tactful negotiator and persuasive communicator, Kate has tried more than 60 cases to verdict in state and federal courts. Her advocacy in the appellate courts is equally notable, often being hired by other lawyers after an unfavorable trial outcome. Outside of the courts, she represents clients in arbitration, mediation, and before licensing agencies. Her track record has earned her several honors and widespread recognition by her peers. Kate is a leader on the Executive Committee and Diversity & Inclusion Committee at Hawkins Parnell & Young. She is passionate about actively advancing the legal field and tackling emerging issues. Among her many contributions, she lectures and publishes

articles regularly, serves in leadership roles with national and international organizations, and mentors students to groom the next generation of trial lawyers. Beyond her professional work, Kate volunteers with several organizations in Atlanta and enjoys working with senior citizens. She has been married to her lawyer-husband for over 30 years, has three grown children (none of whom are lawyers), and two dogs.

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, carrier-relations, 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.

KATHERINE WOODS is a civil litigation attorney at Taylor Day Law in Jacksonville, Florida. Katherine's practice generally focuses on insurance coverage in multi-party construction defect litigation, as well as first and third-party extra-contractual and bad faith claims. She regularly provides recommendations to insurance carriers in coverage opinions involving general liability insurance, where her approach is to leave no stone unturned. Prior to joining Taylor, Day, Katherine represented

insureds in bodily injury, construction defect, and products liability lawsuits. Katherine also worked as a prosecutor for the 17th Judicial Circuit in Broward County, Florida. Katherine earned her J.D. from University of Miami School of Law, and her B.S. from Florida State University.

TERESA YOUNG is a partner with Brown & James, P.C., the ALFA International member firm in St. Louis, MO. Within her specialty of insurance defense, Teresa regularly takes on cases that fall into the category of complex litigation, including coverage analysis, multi-party and multi-jurisdictional cases, as well as cases that contain intricate factual or legal issues. She also consistently handles appellate matters for her insurance clients and was recently named an Influential Appellate Advocate by Missouri Lawyers Weekly for her work in bringing a seminal case on co-employee liability before the Missouri Supreme Court. She received her Bachelor's and Master's degree from the University of Kansas, and her J.D. from Washington University in St. Louis.

PROGRAM INFORMATION

Meeting Location

The Logan

One Logan Square
Philadelphia, Pennsylvania 19103
Tel: (215) 963-1500
Hotel Website

Registration

Please contact your ALFA International Attorney to register for this program. ATTENDANCE IS OPEN ONLY TO MEMBERS OF ALFA INTERNATIONAL AND THEIR INVITED GUESTS. ALL EVENTS ARE FOR THOSE 21 YEARS OF AGE AND OLDER.

Attire

The attire for the educational sessions throughout the conference is business casual.

CLE Credit

ALFA International is an approved CLE provider in Illinois, California & Pennsylvania and certifies this program has been approved for 7 hours of CLE. 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 ALFA staff in advance of the meeting and we will ensure that necessary accommodations are provided.

Safe Return To Live Meetings Protocol

The health and safety of all attending ALFA International clients, member attorneys, guests, vendors and staff are of the utmost importance to ALFA International. Please review the [Safe Return to Live Meetings Policy](#) on the ALFA International website for current protocols in place for live meeting attendance. Please note, this policy may change as CDC guidelines are updated so, please check back as the program approaches.

Program Contact

Aria Trombley Wolf
(awolf@alfainternational.com)

Contact ALFA International

ALFA International
980 N. Michigan Ave.
Suite 1180
Chicago, IL 60611
P: (312) 642-2532
www.ALFAInternational.com



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