

*History of the*

# KATIE SCHOOL

The Katie Insurance School was established in 1991 as a living memorial to Mary Katherine "Katie", the daughter of an Illinois State University alumnus, who died at age 2 1/2. The founding Director of the Katie School was Professor Andrew T. Nappi., for whom the Andrew T. Nappi International Study Grant was established.



# *Mission Statement*

The Katie School supports the insurance and financial services industry by providing talented, well-prepared students for careers in the industry.

The Katie School provides a student-centered educational environment to enable students to develop the skills, risk management and insurance knowledge, ethics, technological competency, and attitudes necessary to succeed in the insurance and financial services industry.

The Katie School supports lifelong learning for students, faculty, and industry professionals.



# *Vision Statement*

The Katie School seeks to be the premier undergraduate insurance and risk management program in the nation in the education of future industry leaders through industry involvement, innovative teaching, cutting-edge applied research, and student-centered learning. The Katie School seeks to add value to the industry by providing high quality undergraduate and professional education.



# The Numbers 2007-08

- 818 students enrolled in insurance classes
  - 246 insurance majors and minors
  - 169 members of Gamma Iota Sigma insurance fraternity
  - 83 students internships
  - 6 international internships
  - 54 classroom presentations by industry
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# The Numbers 2007-08

- 122 insurance companies/brokers/agencies recruiting students
  - 18 research and faculty development projects
  - 12 faculty publications
  - 97 students attending industry events
  - 12 students receiving Katie School Student Leadership certification
  - 94 students receiving scholarships
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# Industry Connections

The Katie School sponsors the Executive Forum, continuing education courses, seminars, executive development programs and research that helps advance the industry in Illinois and the nation. Industry leaders who represent national and regional legal, financial, and insurance organizations serve on the school's Insurance Advisory Board of Executives.



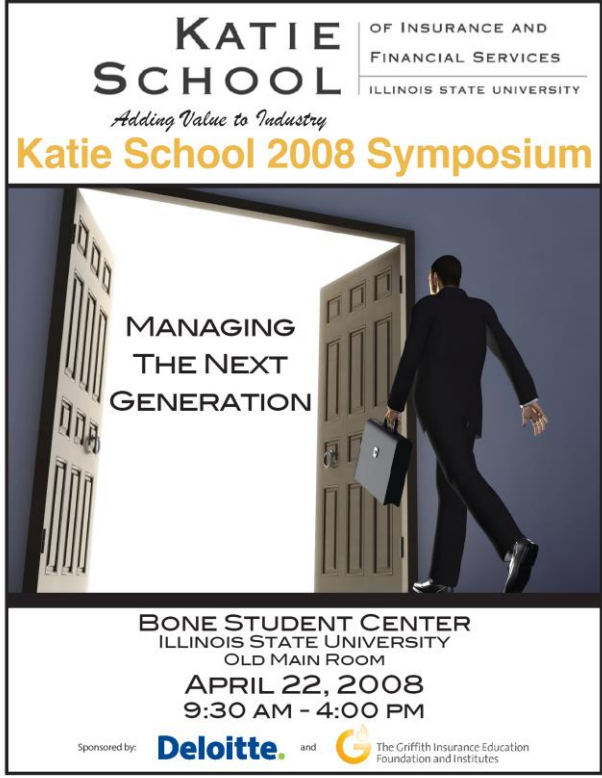
# Insurance Executive Forum

The annual breakfast seminar invites insurance executives and risk managers to hear perspectives from a panel of senior industry professionals on topical issues.



# Katie Symposium

The Katie School Symposium is a unique forum that provides an opportunity for experts from academic institutions and the insurance industry to discuss issues on a related topic




The poster features a central image of a man in a dark suit walking through an open doorway, carrying a briefcase. The doorway is set against a dark background, with light streaming in from the other side. The text is arranged in a clean, professional layout.

**KATIE SCHOOL** OF INSURANCE AND FINANCIAL SERVICES  
ILLINOIS STATE UNIVERSITY  
*Adding Value to Industry*  
**Katie School 2008 Symposium**

MANAGING THE NEXT GENERATION

BONE STUDENT CENTER  
ILLINOIS STATE UNIVERSITY  
OLD MAIN ROOM  
APRIL 22, 2008  
9:30 AM - 4:00 PM

Sponsored by: **Deloitte** and  The Griffith Insurance Education Foundation and Institutes



# London Market Study Tour

In its 14<sup>th</sup> year, the LMST enables underwriters, claims personnel, brokers, capital providers, auditors and others engage in the Lloyd's and London market to become more knowledgeable about the US property and casualty insurance industry.



# Katie School Golf Classic

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Industry leaders and friends of the Katie School enjoy a fun-filled day of golf, food, and prizes. All proceeds support scholarships and program enhancements.



# Institute for Insurance Ethics

The mission of the Institute for Insurance Ethics is to develop programs that will educate members of the insurance and financial services industry, as well as the public about the nature of ethics, social responsibility, and the application of high ethical standards.



# Ken Smith Financial Regulators Program

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## Key Topics:

- Industry Outlook
- Role and Challenges of the Insurance Financial Regulators
- Financial Statement Analysis
- Risk Modeling
- Legislative and Regulatory Issues
- Securitization and Alternative Risk Transfer Reinsurance
- Role of Other Industry Analysts
- Case Studies on Insurance Company Failures



# Professional Insurance Sales Associate (PISA)

The Katie School of Insurance and the Professional Sales Institute at Illinois State University offer the PISA certification program. This program was created, in conjunction with the Professional Independent Insurance Agents of Illinois, to meet the needs of producers with less than two years experience or CSR's interested in becoming producers.



# Insurance Education Institute

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This annual program is designed to assist high school guidance counselors as they work with high school students exploring careers in the insurance industry.



# Risk Manager in Residence

For the past five years the Katie School has participated in the Risk Manager in Residence Program through the Spencer Foundation. It brings talented industry professionals to campus to interact with our students.



Roger Andrews, E.D. Bullard  
Company, at the Katie School

# FAME Scholars - CIAB

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2008 Recipient  
Vanessa Contreras



2008 Recipient  
Jon Perry



# APIW



Vanessa Contreras  
2008 APIW Scholarship  
Recipient



APIW Luncheon with Janice  
Ochenkowski, Katie alumni  
and students

# Gamma Iota Sigma

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The International Risk Management,  
Insurance and Actuarial Science  
Collegiate Fraternity at Illinois State  
University



# Gamma Iota Sigma

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## Student Activities

- REBEX Conference
- CPCU Mentorship Program
- RIMS Conference
- Golf Outing and Group Lessons
- Toastmasters
- Industry Speakers
- Community Service Events



# REBEX Conference

## *Itasca*

Students attend industry conferences and participate in educational sessions, network with executives, and practice business etiquette.



# Gamma Members Volunteer for Habitat for Humanity

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# 2008

## RIMS Conference *San Diego*



# 2008

## RIMS Conference *San Diego*



# GIS Officers / Corporate CEO

- Gamma Officers with  
Pat Gallagher –  
Arthur J. Gallagher &  
Co.





# Company Visits

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Katie School students visit Advisory Board companies to learn about various career paths, experience corporate culture and interact with Katie School alumni.



# Insurance Legislative Day

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AJ Rector with State Representative Dan Brady at Insurance Legislative Day in Springfield



# Troy University Symposium

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*Troy, Alabama*

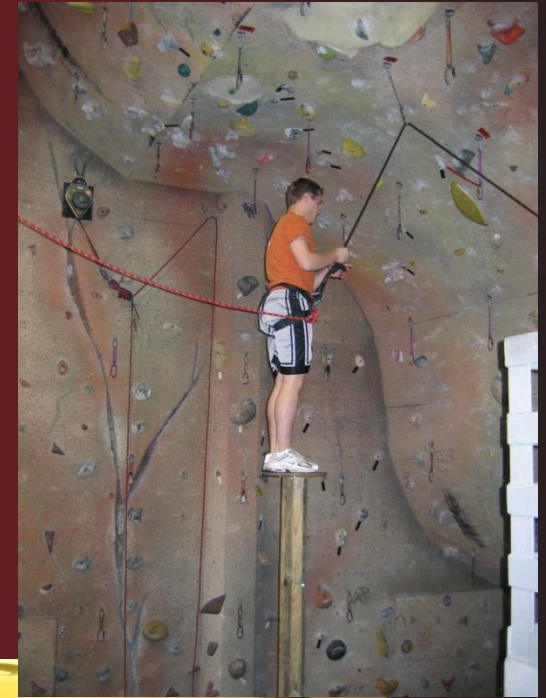
Students focus on  
surplus lines  
in the insurance industry.



# Katie School Student Leadership Program in Risk Consulting

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This program brings together twenty of the top students from the College of Business to develop leadership and business consulting skills.



# Katie School Student Leadership Program in Risk Consulting

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The eight month program culminates with a student risk consulting project for one of several local not-for-profit organizations. Students earn a scholarship and certification upon completion.



# Katie School Alumni Events



# Minority High School Scholars Actuarial Academy

This one-week program is designed especially for above average African-American, Hispanic and Native American high school students who excel in mathematics, enjoy learning, and like to solve complicated problems.



# Minority High School Scholars Actuarial Academy

This program helps to explain what actuaries do, where they work, what they have in common and if an actuarial career might be a good choice. Students will meet and talk to actuaries, observe them at work, and learn how to become an actuary.





# Redbird Risk Management Challenge

Illinois State University invites the best and the brightest high school students in the Midwest to compete in a week-long challenge held at the Katie School of Insurance. Twenty seniors competed in the 2008 Redbird RM Challenge.



# Redbird Risk Management Challenge

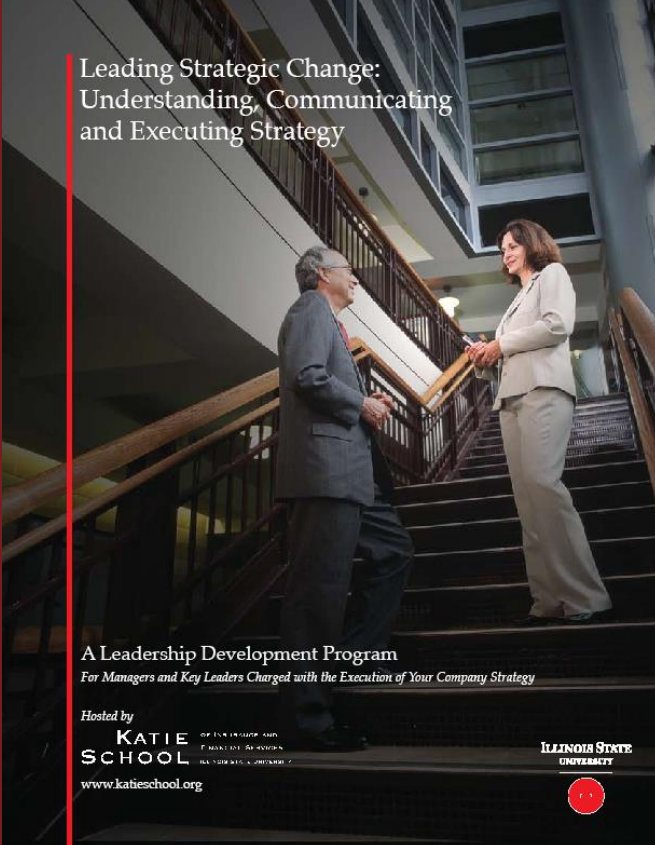
The high school students assume the roles of senior risk management professionals and are asked to guide their corporation through a mine field of potential disasters. Student teams compete against one another in developing the best risk management strategies.



# Professional Development

The Katie School offers programs in:

- Leading Strategic Change
- Ethics
- Insurance Operations
- Developing Financial Acumen
- Leading Organizational Excellence
- Customized Programs



Leading Strategic Change:  
Understanding, Communicating  
and Executing Strategy

A Leadership Development Program  
*For Managers and Key Leaders Charged with the Execution of Your Company Strategy*

Hosted by  
**KATIE  
SCHOOL**  
OF INSURANCE AND  
FINANCIAL SERVICES  
ILLINOIS STATE UNIVERSITY  
[www.katieschool.org](http://www.katieschool.org)

ILLINOIS STATE  
UNIVERSITY

# Research and Consulting

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The Katie School provides value to the industry by conducting research and consulting on industry issues. Some of the Katie School-funded research includes corporate governance best practices, the effect of insurance product diversification on company profitability, dealing with information overload by insurance agents, and the effect of technology and automation on workers compensation claims practices.



# Research and Consulting

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The Katie School also acts as “knowledge brokers” in connecting researchers to consulting projects pertaining to areas such as coverage interpretation, industry professional standards, market competitive analysis, and technology effectiveness.



To learn more about what the  
Katie School has to offer...

*[www.katieschool.org](http://www.katieschool.org)*