

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.



Katie School Insurance Advisory Board of Executives

Afni, Inc.

AIG

Amerisure Insurance

Aon

Arthur J. Gallagher & Co.

Associated Bank

Business Insurance

Chubb Group

Connor & Gallagher

COUNTRY Financial

Gen Re

Illinois Dept of Insurance

Lloyd's

Lockton Companies

Munich Re

Nationwide Insurance

Pekin Insurance

Pinnacle Actuarial

RIMS Chapter-Chicago

RLI Insurance

State Farm Insurance

Surplus Line Assoc of IL

Swiss Re America

Travelers

Zurich North America

Industry Programs

The Katie School sponsors such industry programs as the Insurance Executive Forum, Katie School Symposium, Katie School Golf Classic, Financial Regulators Program, continuing education courses, executive development programs and research that helps advance the industry in Illinois and the nation.

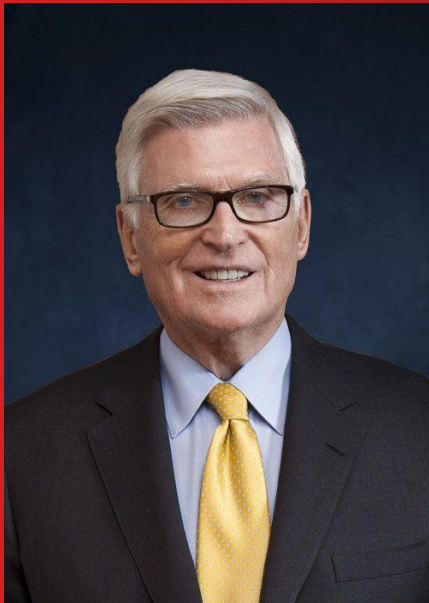


Insurance Executive Forum

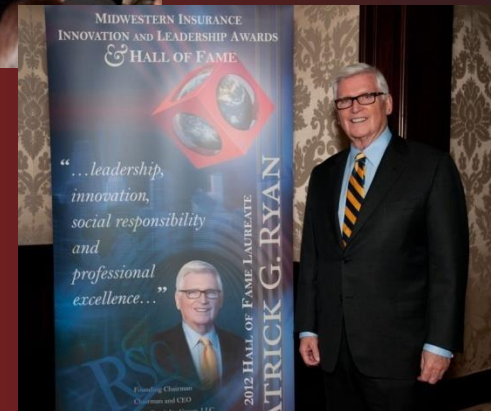
The annual breakfast seminar invites insurance executives and risk managers to hear perspectives from a panel of senior industry professionals on topical issues.



Katie School Hall of Fame Dinner Innovation and Leadership Awards



2012 Laureate
Pat Ryan



Katie School Hall of Fame Dinner Innovation and Leadership Awards



Katie School 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.

2013 Katie School/CPCU Spring Symposium

Emerging Issues *in* Insurance

8 a.m.–3 p.m.
Thursday, April 25, 2013
Bloomington-Normal Marriott Hotel & Conference Center

The Katie School Symposium is a unique forum providing an opportunity for industry experts, consulting firms, and academics to discuss pressing issues. This year's symposium will focus on **Emerging Issues in Insurance**.

Thriving insurance organizations keep a close eye on emerging issues that may impact their long-term success. Join us for presentations by industry experts on current and emerging trends that dominate today's insurance landscape. A special executive session will include discussions on how mobile technologies, social media, and an urgent need for talent are driving change in the industry. Explore and reflect on how these issues affect your competitive advantage, innovation, processes, best practices, growth, and future.

2013 Symposium Presenters

JEFF MYERS
Senior Research Statistician
State Farm Insurance Company
Economic Issues Facing the Insurance Industry

PATRICK TALLEY
Regional Director U.S. Lloyd's America
Emerging Risks Facing Property and Casualty Industry

JEFF TEMPORA
CEO, Advanced Insurance Products & Services
Usage-Based Insurance

PATRICK DUNAGAN
Counsel—Corporate Law, State Farm Insurance

Special Executive Panel
Drivers of Change in the Insurance Industry


Barb Bauer
CEO, COUNTRY Financial


Craig Klierthermes
SVP Risk Services, RLI Insurance

Amy Bally
AVP Strategic Relationships, State Farm Insurance Company

Continental breakfast and lunch are included. Parking is available in the garage across the street, south of the Marriott. To register please go to www.KatieSchool.org and click on Symposium link. **Seating is limited, so act soon!**

If you have questions contact Sue Stombaugh at the Katie School of Insurance and Financial Services at (309) 438-3021 or skstomb@IllinoisState.edu.

 **KATIE SCHOOL OF INSURANCE AND FINANCIAL SERVICES**
Illinois State University

 **CPCU SOCIETY**

*Some limited special accommodations for fully participating in this program/panel, please contact Sue Stombaugh at (309) 438-3021. Please allow sufficient time to arrange the accommodations. An equal opportunity/affirmative action university. Insurance, Property, Casualty, Marketing, and Governmental. © 2013 printed on recycled paper.

London Market Study Tour

In its 18th 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

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.



Katie School Financial Regulators Program

Key Topics:

- Risk Assessment in Practice
- Identifying Troubled Companies
- Trends in Insurance Technology
- Corporate Governance
- How to Analyze Investment Portfolios
- Property/Casualty Loss Reserves
- ERM and Insurance Companies
- Analysis Techniques and Financial Solvency Tools

Application Form for June 3 - 12, 2013 Program

Enrollment is limited to 30 participants and is **FREE** to **Insurance Regulators**. If you have questions, please call Lesley Sauder, (800) 697-8692 or e-mail to lsauder@ilstu.edu. Application deadline is May 24, 2013.

Applications for admission to the program are currently being accepted. Please complete the form online at www.katieschool.org and click on "Register for Katie School Programs".

Katie School Financial Regulators Program
at Illinois State University
June 3 - 12, 2013

KATIE SCHOOL OF INSURANCE AND FINANCIAL SERVICES
Illinois State University
An equal opportunity/affirmative action university encouraging diversity

Risk Manager in Residence

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

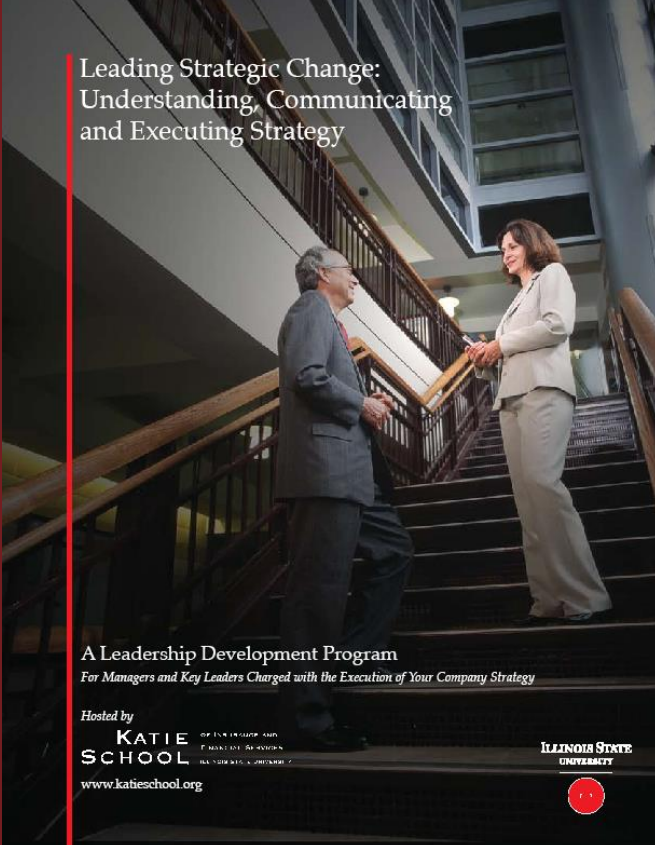
Spring 2013: Larry Jenchel – Sears
Fall 2013 – Mari-Jo Hill - SAS



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

ILLINOIS STATE UNIVERSITY

Research and Consulting

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

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.



Undergraduate Program



COURSE OFFERINGS

- Introduction to Risk and Insurance
 - Property Insurance
 - Liability Insurance
 - Life and Health Insurance
- Retirement Planning & Employee Benefits
 - Insurance Company Operations
- Sustainability, Risk Management and Insurance
 - Risk Management
 - Insurance Internship

Minor – Financial Planning

Investments

Intro to Risk and Insurance

Federal Income Taxation

Personal Selling and Relationship

Marketing

Estate Planning

Retirement Planning & Employee Benefits

Gamma Iota Sigma

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



Industry Speakers

- Offer insights into career paths
- Share day to day experiences of their jobs
- Provide visibility for their companies



Toastmasters Club

- Develop and improve public speaking abilities
- Weekly meeting
- For members of Gamma Iota Sigma, the Katie School pays Toastmaster Club fees.



Gamma Members Volunteer for Special Olympics & Easter Seals



Professional Designations

- Provide students with a \$230 award for passing any CPCU exam
- Provide students with a \$150 award for passing any ARM, ARe, or AIC exam
- Provide students with a \$100 award for passing any INS exam
- Provide students with a \$200 award for passing any LOMA recognized designations

International Internships

The Katie School covers:

- Airfare
- Lodging
- Meals
- Ground Transportation
- Course Credit

Bermuda



London



Zurich



Johannesburg

REBEX Conference

Wheeling, IL

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



2013

RIMS Conference *Los Angeles*



GIS Officers / Corporate Executives

- Gamma Officers with John Nelson, Chairman of Lloyd's
- Eric Smith – President & CEO, Swiss Re Americas



Company Visits

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



NAPSLO 2013 Symposium

A weekend symposium in Chicago hosted by the Katie School for over 100 RMI students from the U.S. and Canada.



IMUA Conference 2013

Atlanta



Troy University Symposium

Troy, Alabama

Students focus on excess and surplus lines in the insurance industry.



VCU/Spencer Risk Challenge

2nd place!



PLRB Conference

Boston



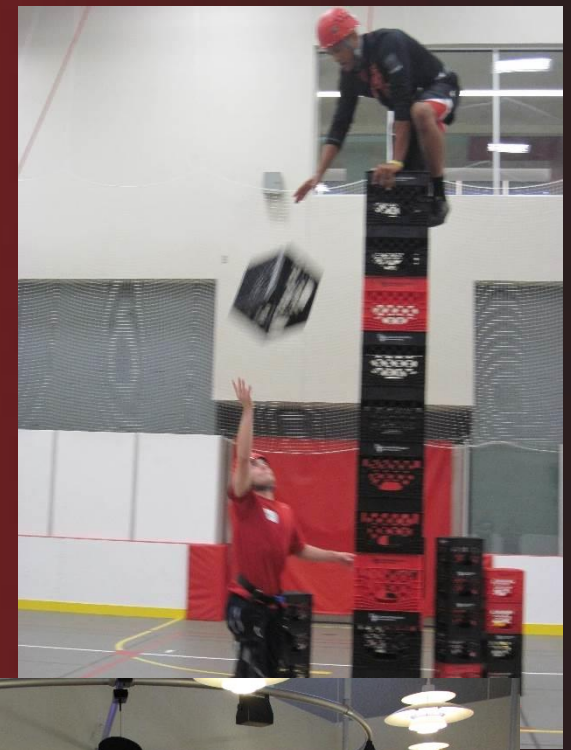
Group Golf Lessons

- Golf etiquette
- Networking and a means to conduct business
- Who wants to be left behind in the office?



Katie School Certificate in Leadership and Business Acumen

This program provides students with an opportunity to develop and demonstrate skills and leadership which may not be able to attain from a traditional classroom experience.



Katie School Certificate in Leadership and Business Acumen

Students earning the Certificate in Business Acumen must complete a total of 100 points from categories including Non-Course Technical Skills, Industry Understanding and Soft Skills.



Scholarships

The Katie School awards approximately \$100,000 in scholarships each year.



2013 -2014 Spencer Scholars



Jean Celestin



Patrick O'Brien

FAME Scholars

The Council of Insurance Agents and Brokers



2013 Recipient
Frank Busch



2013 Recipient
Jean Celestin

FAME Scholars

The Council of Insurance Agents and Brokers



2013 Recipient
Kevin Leadley



2013 Recipient
Katie Muender

APIW

Association of Professional Insurance Women



Dana Thomas

2013 APIW Scholarship Recipient

Katie School Alumni Events



High School Outreach

Student Ambassador Program

Katie School students talk in high school classes around the state about insurance and careers in the industry.



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 country to compete in a week-long challenge held at the Katie School of Insurance. Twenty seniors competed in the 2013 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.



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

www.katieschool.org