

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 Insurance

Gen Re

Illinois Dept of Insurance

Lockton Companies

Munich Re

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

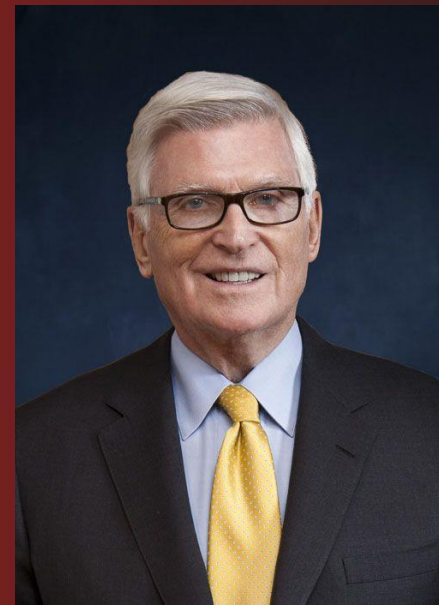
The annual breakfast seminar invites insurance executives and risk managers to hear perspectives from a panel of senior industry professionals on topical issues.



Katie School Hall of Fame Dinner Innovation and Leadership Awards



2014 Laureate
Dave Lockton



2012 Laureate
Pat Ryan

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.

2014 KATIE SCHOOL/CPCU SPRING SYMPOSIUM

ENTERPRISE RISK MANAGEMENT

8am - 3pm | WEDNESDAY, APRIL 2, 2014
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 Enterprise Risk Management (ERM) for Insurers.

ERM delivers significant strategic advantages in increased efficiencies, increased business opportunities, reduced earning volatility, stronger capital position, and higher profitability. ERM attracts attention in today's uncertain world of complex and interrelated risks. Insurers face increased scrutiny by rating agencies, regulators, and auditors reviewing how insurers are developing and implementing their own ERM system. This year's event includes an insurance industry outlook, an overview of new ERM regulatory requirements, an uncovering of cyber threats and vulnerabilities, and practical details of how ERM is implemented in underwriting, claims, systems, and other areas of insurer operations.

2014 SYMPOSIUM PRESENTERS	SPECIAL EXECUTIVE PANEL
<p>ROBERT P. HARTWIG <i>President and Economist</i> Insurance Information Institute Industry Trends and Issues</p> <p>ELISABETTA RUSSO <i>Principal, Advisory Lead</i> Deloitte Consulting LLP ERM Regulation: ORSA</p> <p>JAMES WILLIAMS <i>Tech Analyst-Scarcity</i> State Farm Insurance Company</p> <p>BRYAN SHEPPARD <i>Service Manager</i> State Farm Insurance Company Office of Information Security IT Risk and Compliance Threat and Data Security Cyber Risk Vulnerability</p> <p>BRENDAN HEFFNER <i>Bloomington Police Chief</i></p>	<p>Integrating ERM into your Organization</p> <p>TOM HILMES <i>Director, Corporate Risk</i> COUNTRY Financial</p> <p>LORIE GRAHAM <i>Senior Underwriting and Corporate Risk Manager</i> American Ag</p> <p>LAURA WYRICK <i>Director ERM</i> State Farm Insurance Company</p> <p>To register please go to KatieSchool.org and click on Symposium link. Seating is limited, so act soon. There is NO CHARGE for faculty, staff or students.</p> <p>If you have questions contact Sue Stambaugh at the Katie School of Insurance and Financial Services at (309) 438-3021 or stambaugh@illinoisstate.edu.</p>

Continental breakfast and lunch are included. Parking is available in the garage across the street, south of the Marriott, and is included in the registration price.

London Market Study Tour

In its 20th 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 2 - 11, 2014 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 23, 2014.

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 2 - 11, 2014



An equal opportunity/affirmative action university encouraging diversity



Risk Manager in Residence

For 12 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.

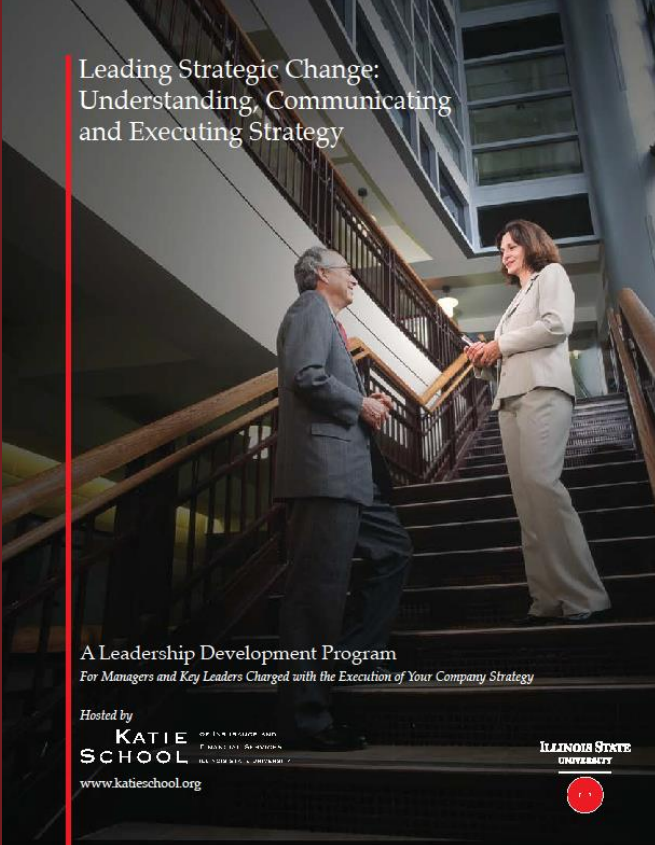
Fall 2013: Mari-Jo Hill



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

New 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 & Habitat



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

London ~ Bermuda
Zurich

The Katie School covers the cost of:

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



REBEX Conference

Wheeling, IL

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



2014

RIMS Conference *Denver, CO*



GIS Officers / Corporate Executives

- Gamma Officers with Inga Beale, CEO of Lloyd's and Thomas Hurlimann, CEO of Global Corporate at Zurich.



Company Visits

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



NAPSLO 2014 Symposium

A weekend symposium in Chicago hosted by the Katie School for over 150 RMI students from the U.S. and Canada.



Troy University Symposium

Troy, Alabama

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



Spencer Risk Challenge



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.



2014 -2015 Spencer Scholars



Recipient
Ryan Curran



Recipient
Thomas Fitzgerald

2014 -2015 Spencer Scholars



Recipient
Brianna Gatto



Recipient
Michelle Godbey



Recipient
Alexis Ramiro

FAME Scholars

The Council of Insurance Agents and Brokers



2014 Recipient
Frank Busch



2014 Recipient
Nick McGurk



2014 Recipient
Courtney Lamar

Lana James Memorial/APIW

Association of Professional Insurance Women



Michelle Godbey

2014 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 2014 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