

Please suggest a question for the panel.

Please return this form to

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Change: The Only Constant

19th Annual Insurance Executive Forum

Breakfast seminar for insurance
executives and risk managers

Tuesday, October 20, 2009
8-11 a.m.

Union League Club
65 West Jackson Boulevard
Chicago

(312) 427-7800



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

PROGRAM OVERVIEW

The theme of change that pervaded the November 2008 elections has continued into 2009. Change impacts the insurance industry over a broad range of areas, including capital, workforce dynamics, regulatory requirements, market conditions, talent, and intellectual capital. We invite you to join us as our panel of insurance industry executives discuss the major industry issues of the day and provide their thoughts on the impact of changes within the industry. Some of the issues to be addressed include:

- How does the industry address the impact of the financial crisis and economic slowdown, which has been identified as the number one issue in the insurance industry and in the minds of risk managers?
- How will the consequences of these economic events and their aftermath shape the industry going forward? How does the industry survive and thrive in these difficult times?
- How is the current political environment impacting the insurance industry? While regulatory reform is fairly certain, what other changes are expected? What will be the impact of proposed regulatory reforms that are expected in the next few months? Is the industry prepared for reform?
- Has the perception of enterprise risk management been changed by the financial crisis, and what will be the impact on future initiatives? Putting aside questions arising from perceived failure or flaws in the framework, have ERM initiatives been stalled by the economic slowdown?
- Where are we in the current industry cycle, and what impact are economic conditions having on the cycle? Are there any long-term consequences for the market?
- What are the implications of a pandemic arising from “swine flu” for the insurance industry? How prepared is the industry for a pandemic, both for internal operations and to support its clients?
- How does the insurance industry recruit and retain the “best and brightest” to assure that the talent to move the industry forward is available? How do changes in retirement plans of the baby boomers and the reductions in workforces due to the economic downturn impact the level of talent and intellectual capital in the industry and workforce dynamics?
- How do insurers and brokers assist their clients in identifying and managing the risks to their businesses that arise from continued progression of globalization?

- How will the increased focus on climate change and “green” affect the industry? Is the industry effectively addressing these issues?
- As technology continues to grow and reshape how products and services are delivered, what are the implications for the insurance industry? What steps should the industry take regarding technological solutions to increase efficiencies without negatively impacting customer relations, stifling innovation, or depleting the intellectual capital within the industry?
- What impacts are expected from emerging technologies? Is the industry prepared to deal with the new risks that arise from them?

This forum has a history of offering thought-provoking dialogue with an ample opportunity for your questions—including the chance to submit a question for the panel with your registration form. We hope you will join us.

SCHEDULE

- 7:30 a.m. Registration and coffee
- 8:30 a.m. Breakfast
- 9:15 a.m. Panel discussion with industry leaders and audience participation
- 11 a.m. Closing remarks

WHO SHOULD ATTEND?

- Insurance company CEOs, CFOs, managers, and underwriters who need to know what the competition is doing to meet the challenges that lie ahead.
- Risk managers who must anticipate future needs to protect the company’s assets and income against a broad array of risks associated with the business.
- Strategically oriented brokers who interface between buyers and sellers and need to be more knowledgeable about the future of the industry.
- Reinsurance brokers who seek to become the solution providers to the risks they are placing.
- Bankers and market analysts who need to keep pace with the changes and emerging trends in the insurance and financial services environment.

MODERATOR

Millie Workman is director of training and education for International Risk Management Institute, Inc.

SPEAKERS

Scott H. Beckman is the vice president of claims for ISMIE Mutual Insurance Company, the largest medical malpractice insurance company in Illinois. He was the vice president of risk management and insurance for Advocate Health Care Network for 19 years and served as chairman of Advocate Insurance SPC, Illinois Masonic Insurance Company, Ltd., and Certus Indemnity Company, Ltd. He received his B.A. from Loyola University, Chicago, in 1981 and his J.D. from Loyola University Law School, Chicago, in 1983. He has been a licensed practicing attorney in state and federal courts since May 1984.

Beckman was honored as the 2008 Risk Manager of the Year and is a member of the American Society of Healthcare Risk Management, member and past president of the Chicagoland Healthcare Risk Management Society, member of the Risk Insurance Management Society, former board member of the Chicago Chapter of RIMS, chair of the Legislative Committee for Chicago-RIMS, member of the Conference Programming Committee for RIMS and member of the Finance Committee for RIMS. Additionally, he is a board member of the Captive Insurance Companies Association. During his career, he has served as a lecturer for health law courses at Loyola University School of Law, as well as legal/health care finance courses at Rush University.

Seraina Maag is president of Zurich's Specialty Products business unit in North America. She joined Zurich's Specialty Products business unit as chief financial officer in 2006, after spending four years running Investor Relations and Rating Agencies for Zurich Financial Services in Switzerland. In that role, Maag was responsible for managing the group's relationships with investors, analysts, and rating agencies on a global basis. Prior to joining Zurich in 2002, Maag was a partner and financial analyst for Neue Zuercher Bank in Zurich.

She also spent more than 10 years with Swiss Re in Zurich and Melbourne, Australia. While at Swiss Re, she held a variety of senior management positions in areas including finance and underwriting surety and property and casualty lines. Maag holds an M.B.A. from Monash Mt. Eliza Business School in Australia. She is a chartered financial analyst (CFA), as well as a member of the CFA Institute and the Association of Professional Insurance Women (APIW).

In 2009, Maag was nominated as a Young Global Leader by the World Economic Forum, which annually identifies 200-300 exceptional young leaders who share a commitment to shaping the global future.

Patricia Roberts is president and chief executive officer for Genesis Underwriting Management Company. She joined General Reinsurance in 1977 and transferred to its subsidiary company, General Star Management, a year later. Roberts was named president and chief executive officer of General Star Management's excess and surplus lines operations in 2001. In 2004, she became president and chief executive officer of Genesis Underwriting Management Company. Roberts is a graduate of George Mason University and has achieved her CPCU designation.

Dave Zuercher is an executive vice president and group head of Wells Fargo's International and Insurance Services Group, a business segment that generates more than \$3.5 billion in annual revenue for the company and employs more than 10,000 team members. A 40-year company veteran, Zuercher also serves on the Wells Fargo Management Committee. He is chairman of Wells Fargo Insurance Services Inc., and Wells Fargo Insurance, Inc.; and chairman of Rural Community Insurance Group, Inc., a Wells Fargo company and the nation's largest crop insurer.

He is a director of Shanghai Commercial Bank Ltd. of Hong Kong, SAR; the Executive Service Corps of Southern California; the Los Angeles World Affairs Council; the Performing Arts Center of Los Angeles County; and KCET Community Television of Southern California. Zuercher graduated from Loyola Marymount University in Los Angeles, where he is a member of its Board of Regents.

KATIE SCHOOL HIGHLIGHTS

- One of the largest undergraduate programs in insurance and risk management in the U.S.
- London Market Study Tour program
- Ken Smith Financial Regulators Program
- Katie School Golf Classic
- Katie School Insurance Executive Forum
- Katie School Symposium
- Spencer Educational Foundation Risk Manager in Residence Program
- Executive-on-Campus Program
- Advisory Board of Insurance Executives
- Institute for Insurance Ethics
- Edmonson-Miller Endowed Chair
- Insurance-related research and industry services
- Executive education and management development programs
- Redbird Risk Management Challenge for High School Students
- Katie School Student Leadership Certification Program
- Minority High School Scholars Academy for the Study of Actuarial Science/Insurance
- Student internship program, domestic and international including London, Bermuda, and Zurich
- Gamma Iota Sigma insurance fraternity chapter
- Student involvement in industry conferences
- Spencer Educational Foundation Scholar recipients
- Anita Benedetti Student Involvement Program participants
- Angus Robinson Jr. Memorial Scholarship winners
- Association of Professional Insurance Women Scholarship recipients
- Over \$100,000 awarded in scholarships annually

REGISTRATION AND PAYMENT INFORMATION

(Please duplicate this form for group registration.)

Please register me/our group for the 19th Annual Insurance Executive Forum.

Fee\$150 per person

Table of 10\$1,250 per table

Organization

Mailing address

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Payment information

Check (payable to Katie School/Illinois State University) is enclosed.

Credit Card—payment by VISA, AMEX, MC or Discover credit card must be completed online at www.katieschool.org. Please click on “Register for Katie School Events” on the home page.

This confirms my telephone registration. Check (payable to Katie School/Illinois State University), letter of intent, or purchase order is enclosed.

Cancellation policy

Cancellations received in writing or by telephone on or before October 6, 2009, will receive a refund of the registration fee less a \$25 processing fee. Refunds will be processed after the seminar. After October 6, 2009, no refunds will be issued. Attendee substitutions may be made at any time.