

**PROFESSIONAL LIABILITY
DEFENSE FEDERATION**



**EIGHTH ANNUAL MEETING AND
CLE/CEU PRESENTATION**

September 27-29, 2017

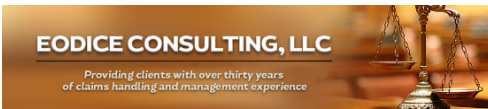
Westin River North
320 North Dearborn Street
Chicago, Illinois

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Welcome Party!

Please join your member colleagues for a Welcome Party on September 27, 2017 beginning at 6:00 p.m., in the 320 River Bar in the Astor Court at Westin River North.



The Welcome Party is sponsored by:



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PROFESSIONAL LIABILITY DEFENSE FEDERATION

7:30 to 8:15 a.m. **Full Breakfast Buffet**

Grant/Lincoln Room

8:15 to 8:30 a.m. **Welcome and Opening Remarks**

Christine S. Jensen
Timothy J. Gephart, CPCU



Timothy J. Gephart, CPCU



Christine S. Jensen
Managing Director

8:30 to 9:20 a.m.

Constructing a Defense – Issues in the Defense of Design Professionals and Contractors at Trial

Astor Room



Geoffrey A. Bryce, Esq.



Thomas S. Mazanec, Esq.



Ari Baruth, Esq.

Geoffrey A. Bryce, Esq.
Thomas S. Mazanec, Esq.
Ari Baruth, Esq.

This panel will focus on the development in the law of different states and varying interpretations and trends throughout different jurisdictions. New laws in California have drastically changed indemnity obligations for design professionals and liability extending to third-parties. We will discuss the implications and trends seen across America. Come listen to our discussion on identifying what kind of construction/AE cases end up in front of a jury.

9:20 to 10:10 a.m.

Social Media Use and Misuse:

Astor Room

LPL/Discipline Complaints and Litigation Tool

John G. Browning, Esq.
Megan Hargraves, Esq.
Benjamin D. Jackson, Esq.
Timothy J. Gephart, CPCU



John G. Browning, Esq.



Megan Hargraves, Esq.



Benjamin D. Jackson, Esq.



Timothy J. Gephart, CPCU

of social media can result in malpractice exposure and disciplinary complaints, and its utilization in all phases of malpractice defense litigation. Complaints may be triggered from misuse during investigation and discovery, presentation of evidence, and study of online juror profiles. The panel will also discuss use of social media as a litigation tool, how attorneys are utilizing social media in all phases of malpractice cases, and how claims professionals can use social media in claim and fraud detection unit investigations.

10:10 to 10:20 a.m. **Refreshment Break**

10:20 to 11:20 a.m.

Current Trends in the Medical Malpractice Marketplace

Paul A. Ruiz, V.P.
Anthony Stompanato, V.P.
Anne C. Cornell, J.D.
Walter J. Price, Esq.
Stephen B. Sambol, Esq.
Wade D. Willard, Esq.



Paul A. Ruiz, V.P.



Walter J. Price, III, Esq.



Stephen B. Sambol, Esq.



Anthony Stompanato, V.P.



Anne C. Cornell, Esq.



Wade D. Willard, Esq.

The medical malpractice industry continues to be in a state of transition. Mergers and acquisitions between insurance carriers, and consolidation within the healthcare delivery system has created new challenges. Additionally, retail medicine, telemedicine, and new technologies are reshaping the accessibility of healthcare. This panel will discuss current trends and challenges within the medical malpractice line of business to include claims activity, the impact of legislation, batch claims, and challenges and opportunities for defense counsel in this changing environment.

11:20 to 12:10 p.m.

Professional Liability Risks Arising from Immigration Issues

Louie Castoria, Esq.
Paul Ablan, CEO



Louie Castoria, Esq.



Paul M. Ablan, CEO

Immigration is not merely a hot topic with respect to national political and economic public policy, it also has ramifications at the state and local level affecting governments and private organizations. Liability risks may burden lawyers, health care providers, employers and others as they navigate new worlds of professional negligence exposure. Cyber liability risks will also be analyzed in an interactive program using audience/panel input technologies.

12:10 to 1:00 p.m. **Lunch and Committee Meetings**

See Signage for Committee Rooms

We thank our Luncheon Sponsors:

- Furman Kornfeld & Brennan LLP
- Lind Jensen Sullivan & Peterson P.A.
- Touchstone Bernays Johnston Beall Smith & Stollenwerck LLP
- Walton Lantaff Schroeder & Carson LLP

1:10 to 2:00 p.m.

Current and Emerging Trends in Insurance Agent/Broker E&O Claims

Astor Room



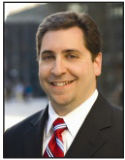
Jason R. Jobe, Esq.

Jason R. Jobe, Esq.
Bridget Q. Choi, Esq.
Barbara Serafini, Esq.
Kiera O. Goral, AVP

Given their role as intermediary, insurance agents and brokers are exposed to many risks in the event an insured later faces coverage issues. Typical allegations against insurance agents and brokers include, "My agent did not get me the coverage requested," "My agent did not get me adequate coverage," "My agent knew my business and the types of risks that I face," or "My agent failed to advise me of exclusions/limitations in my policy." Using an interactive polling application, the panel will lead an audience discussion on current and emerging trends in the defense of these claims.



Christina L. Capobianco, Esq.



Richard J. Perr, Esq.



Judge Mark I. Bernstein (ret.)

Breakout: Persuasive Case Presentation Approaches in ADR Proceedings

Jackson Park Room

Christina L. Capobianco, Esq.
Judge Mark I. Bernstein (ret.)
Richard J. Perr, Esq.

As everyone knows, most advocacy directed to influence neutrals today is not focused on judges or juries, but rather on alternative dispute resolution professionals. Is the approach to advocacy different? Retired Philadelphia Judge Mark Bernstein who now succeeds in the delivery of mediation and arbitration services will be led by an experienced counsel panel as they explore effective techniques and strategies to give clients the best opportunities for voluntary settlement or private adjudication of their disputes.

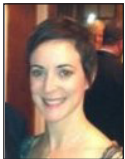
2:10 to 3:00 p.m.

Best Practices in Marketing Industry Members

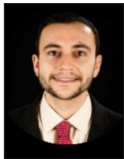
Astor Room



Christopher B. Block, Esq.



Allison L. Chaplick, Esq.



Paul Presman, Esq.

Christopher B. Block, Esq.
Allison L. Chaplick, Esq.
Paul Presman, Esq.
Kathleen V. Buck, Esq.

Willie Loman in "Death of a Salesman" and Alec Baldwin in "Glengarry Glen Ross" had their approaches to new client development in an earlier era. Are they still effective? This program will explore best practices in motivating claims professionals to take a chance on a new counsel selection. Panel members will discuss tiresome and endearing approaches to the age-old yet vital component to private practice success.



Heidi Bevis



Natalie Blind, Esq.



Thomas D. Jensen, Esq.

Breakout: Defense and Adjustment of Chiropractic and Outpatient Surgery Center Cases

Jackson Park Room

Thomas D. Jensen, Esq.
Heidi Bevis
Natalie Blind, Esq.

Alpha to Omega: chiropractors to surgeons in one sitting! Claims leaders on this panel will provide an overview of traditional claim presentations chiropractic physicians may contend with, and emerging claim presentations surgeons operating in outpatient surgery centers may face. Our objective is to introduce audience members to the science, standards of care, defense and claim adjustment strategies employed in these growing segments of the professional negligence space.

3:00 to 5:00 p.m. **“Field” Trip (Literally)** Kinzie Chophouse
 Wrigley Field Guided Tour (home of the Chicago Cubs), or
 The Field Museum of Natural History Self-Guided Tour
 Meet at lobby to board buses for Wrigley Field or Field Museum

7:00 to 8:00 p.m. **Member Social Hour** Kinzie Chophouse
We thank our Social Hour Sponsors:
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 • Thompson Coe Cousins & Irons LLP

8:00 to 10:30 p.m. **Member Dinner** Kinzie Chophouse
We thank our Member Dinner Sponsors:

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- Sweeny Wingate & Barrow P.A.
- Rhoads & Sinon, LLP
- Kaufman Dolowich Voluck, LLP
- Morrow Willnauer Klosterman Church LLC

7:30 to 8:30 a.m. **Full Breakfast Buffet** Grant/Lincoln Room

8:30 to 9:30 a.m. **Damage Control: Strategic and Ethical Considerations in LPL Claim Repair** Astor Room



Peter L. Gregory, Esq.



Alice M. Sherren, Esq.



Corrine G. Ivanca, Esq.

Peter L. Gregory, Esq.
Alice M. Sherren, Esq.
Corrine G. Ivanca, Esq.

This presentation will examine strategic and ethical considerations in the practice of claim repair for LPL claims. Ethical considerations to be discussed include defining the scope of the representation by claim repair counsel, identifying to whom duties are owed, the disclosure obligations by the potential defendant, existence and waivability of conflicts, securing cooperation of the potential claimant, consent-to-settle clause complications, and when the potential defendant must withdraw.

9:30 to 10:20 a.m. Professional Liability Bad Faith Trends Update **Astor Room**



Donald Patrick Eckler, Esq.



Michael D. Handler, Esq.



Jennifer Berard, Esq.



Timothy M. Fletcher, CPCU

Donald Patrick Eckler, Esq.
Jennifer Berard, Esq.
Timothy M. Fletcher, CPCU
Michael D. Handler, Esq.

This presentation will focus on bad faith challenges particular to medical and legal malpractice claims from the perspective of two claims professionals and the issues facing coverage and defense counsel. Consent judgments and assignment of bad faith claims against

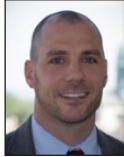
insurers with agreements not to execute will be addressed. Ethical challenges facing defense counsel and how the insurer, coverage counsel, and defense counsel should handle those issues will also be addressed. Finally, the panel will also address denial of a claim by an insurer where no defense is offered and the potential consequences of that decision.

10:20 to 10:30 a.m. Refreshment Break

10:30 to 11:30 a.m. Employment Law Landscape 2017 and Beyond **Astor Room**



Dove A.E. Burns, Esq.



Anthony T. Bowser, Esq.



Heidi H. Roll, Esq.

Employment Law Landscape 2017 and Beyond
Dove A.E. Burns, Esq.
Anthony T. Bowser, Esq.
Heidi H. Roll, Esq.

Legislative, administrative and political changes in 2017 will impact claims and underwriting in the employment space for years to come. Overtime regulations, EEOC enforcement generally and mental health discrimination and reasonable accommodation guidance specifically, joint employment ramifications, equal pay pressures, and other topics will be assessed in this segment. EEOC's new Strategic Enforcement Plan for the next four years will be dissected on a range of issues you see in daily headlines.

11:30 to 12:20 p.m. Use of Business Analytics in Voir Dire **Astor Room**



Daniel F. Church, Esq.



Bryce L. Gartner

Daniel F. Church, Esq.
Bryce L. Gartner, CEO

This presentation will address new techniques for use in voir dire through the application of big data concepts applying analytics to develop critical juror background information helpful to assist juror strike determinations. Latest technology will be described that reveals public information on consumer behavior, business and social media, and political and charitable tendencies. Be prepared for the brave new world of juror suitability analysis.

12:20 p.m. Adjournment

12:30 p.m. Luncheon of the Board of Directors

Seminar Presenters

Paul M. Ablan joined **Minnesota Lawyers Mutual** in January of 2015 as its President/CEO. Prior to that, he was President of the Professional Liability Group at OneBeacon Professional Insurance. Before joining OneBeacon, he held a variety of positions within the U.S. and international operations of The St. Paul Companies, Inc. He began his career as an attorney in private law practice, after graduating from the University of Minnesota Law School in 1985. He is a member of the American Bar Association and the Minnesota State Bar Association.

Ari Baruth practices with **Long & Levit, LLP** in **San Francisco**. He focuses on the representation of architects, design professionals, owners and other professionals in the construction industry in design and construction-related matters. Mr. Baruth also defends and consults for real estate professionals in a variety of contexts including contract negotiation, commercial leases, and litigation. Ari may be reached at abaruth@longlevit.com.

Jennifer Berard is a Director of Professional Services Claims at **CNA** with 19 years of experience in litigation and insurance, with an emphasis on large exposure, complex claims in multiple professional lines of business including lawyers, physicians, accountants, and others. Jennifer is a licensed attorney in Kansas and Missouri and earned her CPCU. She may be reached at jennifer.berard@cna.com.

Mark I. Bernstein served as a **Judge** of the First Judicial District of **Pennsylvania** from April 1987 to October 2016. He teaches evidence and civil procedure on the faculty of the Thomas R. Kline School of Law at Drexel University and authored comments on the Pennsylvania Rules of Evidence. Judge Bernstein currently practices **Alternative Dispute Resolution** and serves as both a mediator and arbitrator in all areas of civil litigation. Judge Bernstein may be reached at judgemarkbernstein@gmail.com.

Heidi Bevis is a Litigation Consultant with **NCMIC** located in **Clive, Iowa**. She investigates, negotiates and settles large damage cases. Heidi also provides supervision, guidance and training to the Claims Representatives. She attends mediations and court ordered settlement conferences throughout the country. Heidi has direct contact with defense counsel, NCMIC insureds, plaintiffs and plaintiff counsel in investigating their malpractice claims. She can be reached at hbevis@ncmic.com.

Natalie Blind started her career in private law practice doing medical malpractice defense work. She was then with a CGL carrier for 10 years, first as a claims attorney and later as a manager/AVP in the litigation department where she was involved with a variety of specialty programs. Currently, she is with **The Doctors Company** managing medical malpractice claims. Natalie's background also includes coverage experience through positions with each carrier. She may be reached at natalie.blind@thedoctors.com.

Christopher B. Block is a shareholder at **Marshall Dennehey Warner Coleman and Goggin** in the **Roseland, New Jersey** office. He defends professional liability matters in jurisdictions throughout New Jersey and New York, including claims brought against lawyers, real estate professionals, insurance agents and brokers, appraisers, architects, and engineers. Christopher also defends a wide range of casualty matters including premises liability and products liability. He may be reached at cbblock@mdwgc.com.

Anthony T. Bowser is a partner in the **Harrisburg, Pennsylvania** office of **Thomas, Thomas & Hafer LLP**. He co-chairs the firm's Labor & Employment practice group, where he focuses on representing companies and municipalities in disputes related to employment discrimination, wage and hour, employment contracts, restrictive covenants, trade secrets, unemployment compensation, family and medical leave, employee benefits, reductions in force, and wrongful discharge. Anthony may be reached at abowser@tthlaw.com.

Seminar Presenters

John G. Browning is a shareholder with **Passman & Jones** in **Dallas**. Licensed in Texas and Oklahoma, John defends professionals, employers, manufacturers, and insurers in a wide variety of litigation. He is the author of four books and numerous articles on social media and the law, and his work in this arena has been cited by courts all over the country and in the practice guides of many states. An adjunct professor at three law schools, John may be reached at browningj@passmanjones.com.

Geoffrey A. Bryce is a member of **Bryce Downey & Lenkov**, LLC, in **Chicago**; he concentrates his practice in construction transactions and litigation. He represents developers, owners, facility managers, architects, general contractors, subcontractors, engineers and material suppliers. Geoff's litigation practice includes landowner contractor disputes, restrictive covenant, construction defect, architectural/engineering malpractice, and delay claims. He may be reached at gbryce@bdlfirm.com.

Kathleen Buck is a Senior Claims Consultant for **XL Catlin** in **Atlanta**. Prior to joining XL, Kathleen was the Supervising Claim Attorney for Minnesota Lawyers Mutual charged with overseeing, training and mentoring professional liability claim attorneys handling legal malpractice claims. She also handled complex coverage matters and related litigation. Kathleen graduated from the University of Iowa, College of Law, with distinction, and from Clarke University, magna cum laude. She is a member of the Illinois and Colorado Bars.

Dove A.E. Burns is a partner in **Goldberg Segalla's** Employment and Labor and Professional Liability Practice Groups in **New York** and **Hartford**. With a focus on matters involving employment law and employment practice liability (EPL) claims, she has extensive experience handling complex wage and hour matters, representing clients in employment-related matters in litigation and before various state and federal agencies, and defending executives in matters involving allegations of wrongdoing. She may be reached at dburns@goldbergsegalla.com.

Christina L. Capobianco is a senior associate at **Fineman Krekstein & Harris**, P.C., in **Philadelphia**, and handles civil litigation in state and federal courts throughout Pennsylvania and New Jersey. She defends lawyers, insurance brokers, and other professionals in malpractice claims. Christina also represents transportation companies as well as insurers involved in coverage disputes, including the defense of bad faith claims. She may be reached at ccapobianco@finemanlawfirm.com.

Louie Castoria is the Director of **Kaufman Dolowich & Voluck's** West Coast Professional Liability Practice Group, and Co-Managing Partner of the firm's **San Francisco** office. He defends financial and professional services clients, including lawyers, insurance and real estate agents and brokers, securities broker-dealers and advisers, accountants, and businesses covered under "miscellaneous" professional liability policies, in California and in the Financial Industry Regulatory Authority (FINRA). He may be reached at lcastoria@kdvlaw.com.

Allison L. Chaplick is an attorney and Manager of Specialty Claims in the Professional Liability Claims Department at The **Hanover Insurance Group**. Prior to joining Hanover, Allison was a Claims Attorney at Monitor Liability Managers where she was responsible for managing professional liability suits filed against attorneys and accountants, and Employment Practices Liability Claims. While in private practice, Allison handled cases in both state and federal court, focusing mainly on employment law. She may be reached at achaplick@hanover.com.

Bridget Choi is an attorney and AVP at **Sompo International**, which recently acquired Endurance. Bridget handles professional liability claims nationwide, including insurance agents and brokers, architects and engineers, and miscellaneous professional liability. She also handles claims from the Professional Underwriting Group (PUG), a Sompo MGA which writes E&O policies for small insurance agencies. Before going in-house, Bridget was a senior associate attorney at an insurance defense law firm in New York, New York.

Seminar Presenters

Daniel F. Church of **Morrow Willnauer Klosterman Church LLC** in **Kansas City**, has been representing local and national companies in civil litigation, both in federal and state courts. He represents defendants in class action suits, as well as in cases involving toxic torts, bad faith, railroad, premises liability, professional liability, product liability and general tort claims. He has tried more than 40 cases before juries, and has represented clients in civil trials in 15 states. Dan may be reached at dchurch@mwklaw.com.

Anne C. Cornell is a Senior Claims Attorney at **Preferred Professional Insurance Company**, a Coverys Company, in **Omaha, Nebraska**. Early in her career she defended medical malpractice cases for the State of New York as an Assistant Attorney General. Anne has since worked for several insurers, spending the past 14 years at PPIC. At PPIC she uses her over 30 years of experience in the industry handling high exposure medical malpractice claims nationwide. She may be reached at acornell@ppicins.com.

Donald Patrick Eckler is a partner at **Pretzel & Stouffer**, Chartered, and handles cases in state and federal courts across **Illinois** and **Indiana**. Pat manages complex malpractice litigation involving doctors, lawyers, architects, engineers, appraisers, accountants, mortgage brokers, insurance brokers, surveyors and other professionals. His tort defense work also involves representing long-term-care facilities, product manufacturers, trucking concerns and premises owners. He may be reached at deckler@pretzel-stouffer.com.

Timothy M. Fletcher is a Vice President based in **Gen Re's Atlanta** office. He oversees specialty lines which consist of professional liability and employment liability claims. In his role at Gen Re, Tim manages a staff of experienced Claim Executives and provides advice on various claim and legal issues. Admitted to the Georgia Bar, Tim is also a Chartered Property Casualty Underwriter (CPCU). He is also a guest lecturer at the Georgia State University J. Mack Robinson College of Business. He may be reached at tfletch@genre.com.

Bryce Gartner is the Chief Experience Officer and Founder of **icimo**, llc. His desire to help businesses realize the potential in their data defined icimo and continues to fuel its growth today. Bryce has decades of leadership experience serving as Chief Marketing and Technology Officer in the Banking, Association and Non Profits, E-Commerce and Broadcast, Sports and Entertainment industries. Bryce speaks regularly on redefining analytics to drive measurable business impact. Bryce may be reached at bryce.gartner@icimo.com.

Timothy J. Gephart, CPCU, is Vice President of Claims at **Minnesota Lawyers Mutual Insurance Company**. He has served as an adjunct professor at the University of St. Thomas School of Law, where he taught a course on legal malpractice, and is currently an adjunct professor at the University of Minnesota Law School, where he teaches courses on legal malpractice and professional responsibility. Gephart serves as Chair of the Minnesota Board on Judicial Standards. Tim is the current President of the Professional Liability Defense Federation. He may be reached at tjg@mlmins.com.

Kiera O'Connell Goral is Assistant Vice President for Professional Liability Claims at **QBE**. Kiera manages a team of claims professionals and TPAs on several large programs including insurance agents and brokers, accountants, wealth management advisors, title agents, mortgage brokers, real estate professionals and health care professionals. Kiera serves as relationship manager to QBE's MGA and MGU partners and assists the Specialty Business Group with the development of new program opportunities.

Peter L. Gregory is a shareholder at **Bassford Remele** in **Minneapolis, Minnesota**, where he focuses his civil litigation practice on professional liability defense. Pete defends lawyers against legal malpractice claims and medical providers against medical negligence claims. He also has significant commercial litigation experience representing both plaintiffs and defendants in a variety of business-related disputes. He may be reached at pgregory@bassford.com.

Seminar Presenters

Michael D. Handler is a member attorney at **Cozen O'Connor's**, offices in **Seattle, Washington**, where he has addressed contractual and extra-contractual matters for his insurance company clients across the country. He has advised and defended insurers against allegations of bad faith insurance claims-handling in many jurisdictions. His E&O work also includes defending professionals such as doctors, lawyers, financial advisors and insurance agents and brokers. He may be reached at mhandler@cozen.com.

Megan Hargraves is a member of the litigation team at **Mitchell, Williams, Selig, Gates & Woodyard** in the firm's **Little Rock, Arkansas** office. She practices in the areas of medical malpractice, products liability, and general insurance defense. Megan also advises health care clients on issues related to risk management, quality assurance, and regulatory compliance. As a former law clerk to justices of the Arkansas Supreme Court, Megan often represents clients as an appellate advocate. She may be reached at mhargraves@mwlaw.com.

Corinne G. Ivanca is an attorney with **Geraghty, O'Loughlin & Kenney, P.A.** in **St. Paul, Minnesota**. She focuses her practice on the defense of professionals in malpractice, ethics and licensing matters. She also handles business and intellectual property litigation. She has been selected as a Super Lawyers Rising Star every year since 2013. Corrine practices in Minnesota and Wisconsin. She can be reached at civanca@goklawfirm.com.

Benjamin D. Jackson is a trial lawyer who joined **Mitchell Williams** in **Little Rock, Arkansas** as part of the litigation team in 2006. Mr. Jackson currently represents numerous hospitals, clinics and physicians in professional negligence matters. He also handles litigation in the areas of products liability, class action, and multi-district litigation, as well as all forms of appellate advocacy, mediation and arbitration. Mr. Jackson has successfully tried numerous civil cases to defense verdicts. He may be reached at bjackson@mwlaw.com.

Thomas D. Jensen is a shareholder with **Lind Jensen Sullivan & Peterson, P.A.**, in **Minneapolis, Minnesota**. Licensed in Minnesota, North Dakota and Wisconsin, Tom defends professionals, products, and farmers, and represents insurers in coverage litigation. He blogs at www.malpracticedefense.org, and also performs some ADR neutral work (see www.mediatorsminnesota.com). An ABOTA Advocate, and certified by the National Board of Trial Advocacy, Tom may be reached at tom.jensen@lindjensen.com.

Jason R. Jobe is a partner in **Thompson, Coe, Cousins & Irons, LLP's Dallas, Texas** office. Jason has represented a wide range of professionals, including insurance agents/brokers, third-party administrators, attorneys, accountants, debt collectors, architects and engineers, property managers and web designers/developers. His practice also focuses on representing clients in data privacy and cyber-liability matters. He obtained his J.D. degree from the University of Arkansas. Jason may be reached at jjobe@thompsoncoe.com.

Thomas S. Mazanec is a founding partner of **Mazanec, Raskin and Ryder Co., L.P.A.**, at its **Cleveland** office. Tom was a licensed insurance agent for five years and also worked as a claims professional for Progressive Insurance Company in Cleveland, Ohio for another five years. Tom represents professionals of all sorts, and also defends individuals or companies involving construction litigation, product liability, and catastrophic losses. He is currently a senior trial attorney at his firm. Tom may be reached at tmazanec@mrrlaw.com.

Rick Perr is a partner at **Fineman Krekstein & Harris, P.C.** in **Philadelphia** where he represents creditors, law firms and agencies against individual and class action allegations invoking consumer protection laws, such as the Fair Debt Collection Practices Act, the Fair Credit Reporting Act and the Telephone Consumer Protection Act. He also defends various professionals in malpractice claims and is admitted to practice in New Jersey, New York and Pennsylvania. Rick may be reached at rperr@finemanlawfirm.com.

Seminar Presenters

Paul Presman is a Senior Claims Specialist primarily handling D&O claims with **Liberty International Underwriters**. Paul is also an attorney admitted to practice law in New York and New Jersey, and has earned Associate in Claims (AIC) and Certified Claims Professional (CCP) designations. He has experience managing professional liability claims for various types of insureds, including architects, engineers, real estate and insurance brokers, lawyers and accountants. Paul may be reached at paul.presman@starstone.com.

Walter J. Price, III is a partner in the **Birmingham, Alabama** law firm of **Huie, Fernambucc & Stewart**, LLP. The bulk of Walt's practice is devoted to the defense of hospitals and other healthcare providers in medical negligence cases. He also frequently consults healthcare clients on consent for medical treatment, end-of-life, medical staff, and EMTALA issues. Walt currently serves on the PLDF Board of Directors. He may be reached at wprice@huielaw.com.

Heidi H. Roll is a Financial and Professional Lines Claims Manager for **Starr Companies** with eight years of experience both in private practice and as an in-house claim handler, and been involved in the management of EPL, D&O, financial institution bond, commercial crime, E&O and LPL claims. She is involved in coverage analysis, management of defense counsel, and negotiation of settlement, and has extensive experience working with insureds to efficiently resolve claims. She may be reached at heidi.roll@starrcompanies.com.

Paul Ruiz is a Claim Executive in **Gen Re's San Francisco** office specializing in the resolution of high exposure complex MPL claims, involving physicians, hospitals, dentists, nurses and other health care providers. Paul works with clients who write throughout the United States conducting operational and claim reviews. With over 28 years of experience, he provides clients with thoughtful claims consultation in a partner focused relationship. Paul may be reached at paul.ruiz@genre.com.

Stephen B. Sambol is a partner in the **Orlando, Florida** law firm of **Mateer Harbert, P.A.** **Stephen** is an AV-Preeminent rated attorney and has had numerous jury trials in his 30-plus years of practice. He defends hospitals, physicians and other healthcare providers in medical malpractice cases, and in disciplinary and regulatory matters. A significant portion of his practice also encompasses handling complex business disputes primarily involving the healthcare industry. He may be reached at ssambol@mateerharbert.com.

Barbara Serafini is an attorney and is Assistant Vice President of Claims at **Western Litigation**, where she manages a complex caseload of professional liability claims against lawyers, insurance agents and brokers and title agents on behalf of several different carriers. Prior to joining Western Litigation, Barbara was the Assistant Vice President of RPS Plus Companies, formerly known as the Plus Companies, Inc., handling multiple professional liability claims for various product lines.

Alice M. Sherren is a Claim Attorney with **Minnesota Lawyers Mutual Insurance Company**. Since joining MLM in January 2009, Alice directs the defense of legal malpractice claims, speaks on legal malpractice, risk management, and ethics matters, and has authored numerous articles. Prior to joining MLM, Alice was a litigator in Minneapolis for nearly a decade, and also frequently contributed to various legal publications. She may be reached at asherren@mlmins.com.

Anthony Stompanato, Jr. is the Regional Vice President of the **Chicago** Healthcare claim group for **AIG**. He is responsible for all claim-related activity for the Chicago and London offices as well as serving as liaison for AIG's underwriting team, assisting with new and renewal marketing efforts as well as addressing claim-related client concerns on a nationwide basis. He may be reached at anthony.stompanato@aig.com.

Wade D. Willard is Vice President-Claims with **Preferred Physicians Medical, RRG**, a national carrier focused on the practice of anesthesia. Working for a single-specialty carrier for the past 20 years, his legal career has been dedicated to the medicolegal issues affecting anesthesia health care providers. He regularly speaks at state and national society meetings as well as conducting risk management seminars for policyholders. Wade is a graduate of Washburn University School of Law. He may be reached at wade.willard@ppmrrg.com.

Special Events



We are delighted this year to offer attendees the choice between a guided tour of Wrigley Field, home of the World Champion Chicago Cubs baseball team, or a self-guided tour of the world-renowned Field Museum of Natural History. Simply board the bus at the hotel entrance (or as otherwise directed) and take a break from your studies!



Seminar Registration

Fee for the seminar for early registrants is **\$499.00** for PLDF industry members, **\$549.00** for newer attorney members (less than ten years in practice), **\$649.00** for more experienced attorney members and vendors, and **\$749.00** for non-members. **After September 10, 2017**, the fee is \$499.00 for PLDF industry members, \$599.00 for newer attorney members, \$699.00 for more experienced attorney members and vendors, and \$799.00 for non-members. The fee includes programming, meals at the event venue, refreshments, CLE/CEU credits (in process), Welcome Party, field trip, and the members' Social Hour and Dinner. PLDF maintains a financial aid policy dated August 1, 2010 for those seeking registration fee accommodation based upon individual circumstances. Call PLDF for information pertaining to the program.

Registration: Visit www.pldf.org to register electronically or mail your registration fee with the enclosed registration form to Professional Liability Defense Federation, 1350 AT&T Tower, 901 Marquette Avenue South, Minneapolis, MN 55402.

Refunds: A full refund will be issued for cancellations received on or before **September 10, 2017**. Questions? Call (612) 481-4169.

Lodging Arrangements



PLDF's 2017 Annual Meeting and CLE/CEU Presentation will be held at The Westin River North, 320 North Dearborn Street, Chicago, Illinois 60654. We have reserved a limited number of rooms on **September 27** and **September 28** at a preferential daily rate of \$269.00 for this conference. Call **(888) 627-8385** for the PLDF rate and reservations. Or login to The Westin's site at: www.starwoodmeeting.com/Book/PLDF2017.

We encourage attendees to register early to secure space at The Westin. Thank you.

CLE/CEU Credits/Policies

The manner in which state CLE accreditation rules determine the number of credits available from this seminar will vary, as they do for all seminars. We do expect each presentation offered at this seminar will receive credit, except perhaps the marketing segment. Inasmuch as written materials or presentation slides frequently are not produced until shortly before the seminar, and some states wish to review the materials as part of the credit evaluation process, we will alert members from such states when the credits are determined after the seminar. We will receive many credit approvals in advance of the seminar and will have that information available to attendees at the meeting. We expect to receive approximately nine CLE credits for this program, including at least one ethics credit we will apply for.



Professional Liability Defense Federation is a registered provider of continuing education courses for agents and adjusters under the Texas Insurance Code (Provider Number 65013). We will submit portions of this course for credit approval through the Texas Department of Insurance. Please note that programs eligible for adjuster CEU credits require that the programming be adjuster – not necessarily lawyer - focused. Therefore we expect that fewer adjuster credits will be granted for this program. If you seek adjuster credits beyond Texas (and Texas reciprocity states) please let us know.

Social Hour / Dinner!



Our Social Hour and Member Dinner this year will be held at Kinzie Chophouse, located at 400 North Wells Street in Chicago, about five blocks away at the corner of Kinzie and Wells. Visit with your fellow members and friends at this lovely venue featuring our four-course meal and beverages.

Other Information and Q & A

Business casual dress is appropriate for this program.
For more information, contact:



Christine S. Jensen
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Minneapolis, MN 55402
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PLDF Mission Statement

Professional Liability Defense Federation's mission is to enhance the stature and effectiveness of professional liability professionals through education, training, and the exchange of information.

Professional Liability Defense Federation 2017 Members of the Board of Directors



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“Please join us for fascinating discussions of developments in legal, medical, construction design, insurance producer, bad faith, and employment practices liability claims. Learn innovative insights into social media data use and misuse, ADR advocacy techniques, professional negligence exposures arising out of immigration law, preferred approaches to new client development, and a new “tech heavy” approach to potential juror background investigation. Our ethics segment focuses on claim repair strategies in LPL contexts. Yes, we’ll have our field trip and the unsurpassed Member Dinner.”

Substantive Law Presentations
Defending Malpractice Claims
Ethics Instruction
Business Development
Wrigley Field/Field Museum Tours
Board of Directors Election
CLE/CEU Credits
Social Hour and Dinner!



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