

## SATURDAY, SEPTEMBER 16, 2023 (IN EST)

### 8:45 AM - 2:15 PM **Optional Activity: Mount Vernon VIP Tour - Saturday**

Discover the home of America's first First Family. Past lantern-lit lanes, George Washington's estate unfolds to reveal the lush grounds and majestic views of the Potomac River that enshrine historic Mount Vernon with beauty, innovation, and untold history.

You will get an intimate look behind the scenes of the mansion, including the normally off-limits-to-the-public basement, Mount Vernon's original outbuildings, and the manicured grounds surrounding it. This tour is partially outdoors and involves walking.

## SUNDAY, SEPTEMBER 17, 2023 (IN EST)

### 7:00 AM - 7:00 PM **Registration and Event Information Desk - Sunday**

The NAMIC Event Information Desk is the central location for getting your questions answered and picking up pre-registered attendee packets.

### 8:00 AM - 3:00 PM **Marketplace for Mutuals: Exhibitor Set-Up**

Exhibitors are welcome to setup their booths during this time.

### 9:00 AM - 10:30 AM **Optional Activity: Prayer Breakfast\***

Start Convention with this optional, non-denominational worship service and continental breakfast. Enjoy fellowship and a thought-provoking address.

*\*Optional Ticketed Event*

### 9:15 AM - 1:00 PM **Optional Activity: The Holocaust Museum Tour**

Expanding over three floors, the Holocaust Museum portrays the spread of European antisemitism through artifacts, photographs, and film. Eyewitness testimonials and personal objects belonging to survivors guide you through the three parts of the story: Hitler's rise to power, antisemitic propaganda, and the horrors of the Final Solution.

Upon entry at the museum, you are given an identity card with a name of a real person who was persecuted by Nazis or their collaborators. As you travel through the exhibits, you will be given updates on your person's well-being.

### 12:15 PM - 4:30 PM **Optional Activity: D.C. Highlights Tour**

This excursion will guide you through some of our nation's most treasured monuments and memorials. Take in the panoramic view of the National Mall on the steps of the U.S. Capitol. Scale the steps of the Lincoln Memorial to revere the world-famous statue of America's 16th president. Remember fallen heroes at the World War II, Vietnam Veterans, and Korean War Veterans memorials. This tour is mostly outdoors and involves walking.

## SUNDAY, SEPTEMBER 17, 2023 (CONTINUED)

### 12:15 PM - 4:30 PM **Optional Activity: D.C. Highlights Tour**

This excursion will guide you through some of our nation's most treasured monuments and memorials. Take in the panoramic view of the National Mall on the steps of the U.S. Capitol. Scale the steps of the Lincoln Memorial to revere the world-famous statue of America's 16th president. Remember fallen heroes at the World War II, Vietnam Veterans, and Korean War Veterans memorials. This tour is mostly outdoors and involves walking.

### 3:00 PM - 4:00 PM **NAMIC Officers Meeting\*\***

*\*\*By Invitation Only*

### 4:15 PM - 5:00 PM **VIP Reception\*\***

This reception will help you kick off the 128th Annual Convention with an exclusive, invitation-only VIP Reception. Join us Sunday evening prior to the Welcome Reception hosted by the NAMIC Chair where you can mix and mingle with NAMIC board members, past chairs, Convention planning committee members, and leading sponsors at this special event.

*\*\*By Invitation Only*

### 4:30 PM - 5:15 PM **Merit Society Reception\*\***

*\*\*By Invitation Only*

### 5:00 PM - 6:00 PM **Marketplace for Mutuels: Executive Happy Hour\*\***

*\*\*By Invitation Only*

### 6:00 PM - 7:30 PM **Welcome Reception Hosted by NAMIC Chair**

Enjoy a warm welcome to National Harbor and connect with your peers at NAMIC's opening event. If you'd like to purchase a ticket for a non-registered guest, please refer to the Edit link in your registration confirmation email.

### 7:30 PM - 9:30 PM **NAMIC PAC Optional Activity: Boat Cruise**

Please email Ingrid Gremillion at [igremillion@namic.org](mailto:igremillion@namic.org) to register for this activity.

## MONDAY, SEPTEMBER 18, 2023 (IN EST)

### 7:00 AM - 5:00 PM **Registration and Event Information Desk - Monday**

The NAMIC Event Information Desk is the central location for getting your questions answered and picking up pre-registered attendee packets.

### 7:30 AM - 9:30 AM **Attendee Breakfast**

Start your day off with breakfast in the Marketplace for Mutuels. This breakfast is only for registered attendees.

**MONDAY, SEPTEMBER 18, 2023 (CONTINUED)**

**7:30 AM - 9:30 AM Marketplace for Mutuals: Grand Opening**

Join the fun and excitement for the Marketplace kick-off, as we connect with solution providers and resources. Don't forget to drop your ticket off for the Grand Opening Prize Drawing.

**7:30 AM - 9:30 AM DEI Roundtable Breakfast\***

This informal networking breakfast brings attendees together to share best practices and lessons learned in their companies' DEI journeys. Advanced registration is required.

*\*Optional Ticketed Event*

**8:30 AM - 9:15 AM Sponsor Theater: Xceedance**

Join Xceedance Monday and Tuesday in their Sponsor Theater for a complete immersive experience. Xceedance leadership will be discussing how Xceedance is advancing enterprise transformation and deploying pioneering insurtech to help ensure long-term business success for its clients. There will also be interactive and immersive exhibits and games to enjoy as you take a break from educational sessions for the day.

**9:30 AM - 11:00 AM Opening Session and Keynote: The Happiness Advantage: Linking Positive Brains to Performance**

Join us for the energetic kickoff to NAMIC's 128th Annual Convention featuring vibrant stories, leadership insights, and the latest industry updates. Hear inspirational remarks from Neil Allredge, NAMIC's president and CEO, Jake Black, NAMIC's board chair, and Shawn Achor, author and our keynote speaker.

Conventional wisdom holds that if you work harder, you will be more successful and then you can feel happy. That formula is scientifically broken and backward. After a decade of research at Harvard and work in 51 countries, Shawn Achor came to understand that the formula should be reversed. Happiness, optimism, and social connection fuel potential, allowing us to achieve higher success rates. Moreover, Shawn found that conscious positive habits can overcome genes and environment – even in crisis– to significantly raise our levels of happiness and meaning. In Shawn's newest book, "Big Potential," he demonstrates how inextricably linked our potential is with others in our ecosystem; thus, we need an interconnected pursuit of happiness and success. During the opening keynote, Shawn will use research and case studies to show practical ways individuals and teams can enhance the ecosystem of potential, expand power, defend the system against the negative, and sustain gains.

**Shawn Achor**

NYT Best-selling Author of Before Happiness and The Happiness Advantage  
Goodthink Inc

## MONDAY, SEPTEMBER 18, 2023 (CONTINUED)

- 10:45 AM - 3:00 PM Optional Activity: International Spy Museum Tour**  
Receive your cover and test your intelligence skills on an undercover mission exploring a host of fun and interactive galleries at the International Spy Museum. During this self-guided excursion, you will gain a global perspective on an invisible profession that has shaped history and continues to significantly impact world events. Crack the code on a cipher machine from 1945, delight in the art of disguise, and learn how “pocket litter” can save your life undercover.
- 11:15 AM - 12:45 PM Insurtech Fastpitch on the Marketplace for Mutuals Stage**  
This fast-paced and interactive event was created for property/casualty insurance professionals to learn about cutting-edge technology and solutions through short presentations and demonstrations from leading vendors and insurtech companies. This event is included in your registration.  
Hear pitches from ION, JMI Reports, Swiss Re, and ZestyAI.
- 11:15 AM - 1:00 PM Attendee Lunch - Monday**  
Join us for lunch, located in the Marketplace for Mutuals. All registered attendees and guests are invited to attend.
- 11:15 AM - 6:00 PM Networking in the Marketplace for Mutuals - Monday**  
Filled with companies dedicated to the success of the mutual insurance industry, the Marketplace for Mutuals is the place to find strategic solutions and new partnerships to empower your company to excel.
- 11:30 AM - 1:00 PM New CEO Connections Lunch\*\***  
This event is exclusive to new CEOs of NAMIC member primary insurance companies and requires advanced registration.  
*\*\*By Invitation Only*
- 11:30 AM - 1:00 PM NAMIC PAC Board of Trustees Lunch**
- 11:30 AM - 1:00 PM NAMIC Certification Award Ceremony Lunch\*\***  
Newly certified attendees are invited to join us for lunch as we recognize them and their accomplishments in earning the FMDC, MDC, and/or PFMM designation during this past year. Invitees will receive their official certificate at this lunch.  
*\*\*By Invitation Only*

**MONDAY, SEPTEMBER 18, 2023 (CONTINUED)**

**12:00 PM - 12:45 PM Sponsor Theater: Xceedance**

Join Xceedance Monday and Tuesday in their Sponsor Theater for a complete immersive experience. Xceedance leadership will be discussing how Xceedance is advancing enterprise transformation and deploying pioneering insurtech to help ensure long-term business success for its clients. There will also be interactive and immersive exhibits and games to enjoy as you take a break from educational sessions for the day.

**12:00 PM - 12:45 PM Sponsor Theater: HSB with Economic Futurist, Andrew Busch**

HSB is modernizing specialty insurance to meet the demands of today's risks and will be hosting a day of insights led by outside keynote speaker, Andrew Busch. Andy will delve into the art of making sense out of the chaos that defines our complex and evolving world today. He will fuse his vast experience and unparalleled insights pulled from years of experience working with the U.S. government along with his extensive research offering his unique perspective on the future opportunities that lie within the P&C insurance industry.

**Andrew Busch**

Economic Futurist  
Economic & Policy Research Firm BPI

**1:00 PM - 1:45 PM Power Session: Outlook for the Property/Casualty Insurance Industry: An Industry at the Economic Crossroads**

Robert Hartwig, Ph.D., CPCU, will provide an overview of and outlook for the property/casualty insurance industry and the economic environment in which it operates. He will examine key challenges impacting the industry in recent years and will look forward through the remainder of 2023 and beyond as the economy and property/casualty insurance industry continue to move past the COVID-19 pandemic and into a fraught election year.

**Robert Hartwig**

Clinical Associate Professor, Finance Department and Director, Center for Risk and Uncertainty Management  
University of South Carolina

**1:45 PM - 2:00 PM Networking Break – 1**

**MONDAY, SEPTEMBER 18, 2023 (CONTINUED)**

**2:00 PM - 2:45 PM**

**A. Disrupting the Loss, Repair, Repeat Paradigm: Strategies for Mitigating the Impacts of Severe Weather on the Built Environment**

All too often stakeholders look at the risk severe weather poses to new and existing building inventory and rely on fate or luck to determine outcomes. Yet, during the past several decades, researchers and building professionals at the Insurance Institute for Business & Home Safety have studied how severe weather interacts with the built environment. This research has led to the development of mitigation strategies proven to reduce the frequency and severity of claims. These strategies are contained in the FORTIFIED building programs that offer solutions for a wide range of budgets and perils, including wind, hail, and wind-driven water intrusion. FORTIFIED designations are available for residential, commercial, and multifamily structures.

During this session, attendees will hear about the science behind the standard, the predictable progression of damage that inspires FORTIFIED's systems-based approach, and the technical requirements and the quality assurance elements of the program.

**Fred Malik**

Managing Director, Fortified  
IBHS

**2:00 PM - 2:45 PM**

**B. Basics of Reinsurance Refresher**

*This session qualifies for 1 FMDC maintenance or elective credit in the Operations & Insurance module*

This session will give attendees insights into the types of reinsurance and discuss key terminology. It will also provide overviews of the current reinsurance markets and the reinsurance placement process.

**Scott Rubenstein**

Managing Director  
Guy Carpenter

**Charlene Cass**

Managing Director  
Guy Carpenter

**MONDAY, SEPTEMBER 18, 2023 (CONTINUED)**

**2:00 PM - 2:45 PM C. PFMM: Financial Management - Part 1**

*This session is required as part of the Financial Management module for those working toward the PFMM designation.*

In order to properly manage a mutual insurance company, it is imperative to understand the impact of decision-making on the company's financial statements. This course will guide attendees through the basics of insurance accounting and provide a basis for understanding and analyzing financial statements and the flow of premiums and losses in a company's records.

**Abby De Zeeuw**

Partner  
Cain, Ellsworth & Company

**2:00 PM - 2:45 PM D. Mergers and Affiliations - Panel Discussion**

*This session qualifies for 1 FMDC maintenance or elective credit in the Management module*

*This session qualifies for 1 MDC maintenance credit*

This panel discussion will provide an overview of mergers and affiliations and discuss how mutual company M&As are unique. Panelists will represent small, midsize, and large companies currently engaged or recently engaged in a merger or affiliation.

**David Gautsche**

President & Chief Executive Officer  
Goodville Mutual Insurance Group

**Chris Feldt**

Chief Executive Officer  
Heartland Mutual Insurance Company

**Geneau Thames**

Vice President, General Counsel & Corporate Secretary  
Harford Mutual Insurance Company

**Kevin Kinross**

EVP, General Counsel & Chief Compliance Officer  
CopperPoint Insurance Company

**MONDAY, SEPTEMBER 18, 2023 (CONTINUED)**

**2:00 PM - 2:45 PM**

**E. Sponsor Theater: Xceedance**

Join Xceedance Monday and Tuesday in their Sponsor Theater for a complete immersive experience. Xceedance leadership will be discussing how Xceedance is advancing enterprise transformation and deploying pioneering insurtech to help ensure long-term business success for its clients. There will also be interactive and immersive exhibits and games to enjoy as you take a break from educational sessions for the day.

**2:00 PM - 2:45 PM**

**F. Sponsor Theater: HSB with Renowned Economic Futurist, Andrew Busch**

HSB is modernizing specialty insurance to meet the demands of today's risks and will be hosting a day of insights led by outside keynote speaker, Andrew Busch. Andy will delve into the art of making sense out of the chaos that defines our complex and evolving world today. He will fuse his vast experience and unparalleled insights pulled from years of experience working with the U.S. government along with his extensive research offering his unique perspective on the future opportunities that lie within the P&C insurance industry.

**Andrew Busch**

Economic Futurist  
Economic & Policy Research Firm BPI

**2:45 PM - 3:00 PM**

**Networking Break – 2**

**3:00 PM - 3:45 PM**

**A. Hiring Challenges in the Candidate's Market**

*This session valid for 0.75 PDC for SHRM-CP or SHRM-SCP recertification*

The insurance talent landscape has significantly evolved the past three years. A talent shortage, shifting employee expectations, and long-term hybrid work environments are all impacting how organizations effectively attract, hire, and onboard talent. This session will explore the "Great Realignment" and ways organizations can be intentional and future-focused in their strategies to stay competitive in this current candidates' market.

**Brett Carter**

Managing Director  
Jacobson



**MONDAY, SEPTEMBER 18, 2023 (CONTINUED)**

**3:00 PM - 3:45 PM**

**B. Advanced Reinsurance**

*This session qualifies for 1 FMDC maintenance or elective credit in the Finance & Accounting module*

As a follow up to the Basics of Reinsurance Refresher, this session will dive deeper into the topic to discuss reinsurance pricing, catastrophe modeling, and actuarial analysis.

**Scott Rubenstein**

Managing Director  
Guy Carpenter

**Christine Glavan**

Senior Vice President  
Guy Carpenter

**Brian Johnson**

Managing Director  
Guy Carpenter

**3:00 PM - 3:45 PM**

**C. PFMM: Financial Management - Part 2**

*This session is required as part of the Financial Management module for those working toward the PFMM designation.*

Join us for the second part in this course, during which we will focus on understanding statutory financial statements. We will discuss what regulators look at from performance and solvency standpoints. We will go through a balance sheet and an income statement, discuss performance indicators over time, and provide some basic analysis and ratios widely used in the industry.

**Abby De Zeeuw**

Partner  
Cain, Ellsworth & Company

**MONDAY, SEPTEMBER 18, 2023 (CONTINUED)**

**3:00 PM - 3:45 PM D. How to Optimize Your Mutual Holding Company - Panel Discussion**

*This session qualifies for 1 MDC maintenance credit*

Attendees will hear from panelists who have recently been involved in a mutual holding company transaction. They will discuss how to optimize the structure post conversion.

**Kevin Kinross**

EVP, General Counsel & Chief Compliance Officer  
CopperPoint Insurance Company

**Kelly Ruud**

Chief Financial Officer  
CopperPoint Insurance Company

**Geneau Thames**

Vice President, General Counsel & Corporate Secretary  
Harford Mutual Insurance Company

**Terri Brown**

Executive Vice President, Chief Finance Officer  
Grange Insurance Company

**3:00 PM - 3:45 PM E. Sponsor Theater: Xceedance**

Join Xceedance Monday and Tuesday in their Sponsor Theater for a complete immersive experience. Xceedance leadership will be discussing how Xceedance is advancing enterprise transformation and deploying pioneering insurtech to help ensure long-term business success for its clients. There will also be interactive and immersive exhibits and games to enjoy as you take a break from educational sessions for the day.

**3:45 PM - 4:00 PM Networking Break – 3**

**MONDAY, SEPTEMBER 18, 2023 (CONTINUED)**

**4:00 PM - 4:45 PM    A. The Growing Importance of ESG in the Insurance Industry**

*This session qualifies for 1 MDC maintenance credit*

Where is your organization on its journey to implement an environmental, social, and governance framework? As ESG continues to evolve in the insurance industry, many are seeking guidance to get through the strategy and implementation process and, more importantly, to understand what ESG even is. During this session, Baker Tilly's ESG and insurance industry specialists will define ESG and discuss the current landscape – including the latest on general reporting and regulations in the industry – and explore the many challenges organizations and the industry could face with ESG integration.

**Mark Herzinger**

Principal  
Baker Tilly

**Joe Donnelly**

Partner  
Baker Tilly

**4:00 PM - 4:45 PM    B. Federal Advocacy and Political Update**

*This session qualifies for 1 FMDC maintenance or elective credit in the Operations & Insurance module*

*This session qualifies for 1 MDC maintenance credit*

Today's political environment is toxic. It seems as if politicians are farther apart than ever before. Join this session to hear Jimi Grande, NAMIC's senior vice president of federal and political affairs, apply more than two decades of experience to help diagnose the current situation. Jimi will discuss how decisions being made in the nation's capital impact the insurance industry by highlighting several issues of critical importance to property/casualty insurers.

**Jimi Grande**

Senior Vice President, Federal & Political Affairs  
NAMIC

MONDAY, SEPTEMBER 18, 2023 (CONTINUED)

4:00 PM - 4:45 PM **C. PFMM: Financial Management - Part 3**

This session is required as part of the Financial Management module for those working toward the PFMM designation.

During the final session of this three-part course, we will look at financial risk and how to manage it. Join us as we dive deeper into analysis and the best methods in which to use statutory financial statements to manage a company's risk. We will focus on the impact of growth on the financial statements. We will also discuss the importance of rate adequacy and budget development. Finally, we will touch on mergers and consolidations.

**Abby De Zeeuw**

Partner

Cain, Ellsworth & Company

4:00 PM - 4:45 PM **D. Social Inflation: Taming the Beast**

A rise in the frequency and size of civil litigation court verdicts and settlements continues to inflate insurer loss costs and erode prior-accident-year reserve adequacy. This session will explore the narratives surrounding social inflation and present data-based analysis on the symptoms and causes of this pernicious trend. It will also shed light on how internal insurance industry practices could be strengthened to bring social inflation in check. The session will wrap up by identifying concrete public policy initiatives insurers can pursue externally to help tame the social inflation beast.

**Jerry Theodorou**

Director

R Street Institute

4:00 PM - 4:45 PM **E. Sponsor Theater: Xceedance**

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4:30 PM - 5:30 PM **Past Chair's Reunion\*\***

*\*\*By Invitation Only*

4:45 PM - 6:00 PM **Marketplace for Mutuals: Networking Reception**

Network with vendors who specialize in serving the property/casualty insurance industry while enjoying a lively reception. Also, find out the winner of the Vacation Grand Prize drawing.

## MONDAY, SEPTEMBER 18, 2023 (CONTINUED)

- 5:15 PM - 9:30 PM**     **Optional Activity: Monuments By Moonlight**  
This tour is the same as the D.C. Highlights ... just in the evening. This excursion will guide you through some of our nation's most treasured monuments and memorials. Take in the panoramic view of the National Mall on the steps of the U.S. Capitol. Scale the steps of the Lincoln Memorial to revere the world-famous statue of America's 16th president. Remember fallen heroes at the World War II, Vietnam Veterans, and Korean War Veterans memorials. This tour is mostly outdoors and involves walking. \*This activity does not include dinner.\*
- 5:30 PM - 6:30 PM**     **NAMIC PAC Thank You Reception\*\***  
*\*\*By Invitation Only*
- 6:30 PM - 9:00 PM**     **NAMIC Leadership Reception and Dinner\*\***  
Join us at the Leadership Reception and Dinner, hosted by NAMIC leadership. This event is invite only.  
*\*\*By Invitation Only*

## TUESDAY, SEPTEMBER 19, 2023 (IN EST)

- 7:30 AM - 9:30 AM**     **Donut Social and Bagel Bar**  
Start your day off with donuts and bagels in the Marketplace for Mutuals. This breakfast is only for registered attendees.
- 7:30 AM - 2:00 PM**     **Registration and Event Information Desk - Tuesday**  
The NAMIC Event Information Desk is the central location for getting your questions answered and picking up pre-registered attendee packets.
- 8:30 AM - 9:15 AM**     **Sponsor Theater: Xceedance**  
Join Xceedance Monday and Tuesday in their Sponsor Theater for a complete immersive experience. Xceedance leadership will be discussing how Xceedance is advancing enterprise transformation and deploying pioneering insurtech to help ensure long-term business success for its clients. There will also be interactive and immersive exhibits and games to enjoy as you take a break from educational sessions for the day.
- 8:30 AM - 9:15 AM**     **Sponsor Theater: Bain Capital**

**TUESDAY, SEPTEMBER 19, 2023 (CONTINUED)**

**9:30 AM - 10:30 AM Keynote: A Conversation With David Axelrod and Karl Rove**

Join us for the Tuesday morning Main Stage session, an exclusive conversation with two of the most accomplished political strategists of our time – David Axelrod and Karl Rove.

**David Axelrod**

Senior Political Commentator, CNN, and Host, The Axe Files; Director, University of Chicago Institute of Politics; Senior Advisor to President Barack Obama (2009-2011)

**Karl Rove**

Former Deputy Chief of Staff and Senior Advisor to President George W. Bush, FOX News Contributor and Wall Street Journal Columnist, Best Selling Author

**10:30 AM - 3:30 PM Networking in the Marketplace for Mutuals - Tuesday**

**10:45 AM - 11:30 AM A. Fighting Above Your Weight: How Small Mutuals Survive and Thrive**

*This session qualifies for 1 FMDC maintenance or elective credit in the Management module*

The top 25 property/casualty insurers compose 67 percent of the total property/casualty market. The next 100 property/casualty insurers make up 23, meaning the remaining companies represent the final 10 percent of the total U.S. market. The challenge for those remaining companies is to answer the question, “How do I compete and win?” Join this session to learn how small mutual can thrive.

**Kurt Bock**

CEO, Retired  
COUNTRY Mutual Insurance Company

**10:45 AM - 11:30 AM B. Reinsurance Market Conditions**

*This session qualifies for 1 FMDC maintenance or elective credit in the Finance & Accounting module*

This session will cover current reinsurance market conditions and provide an outlook on the reinsurance market for 2024. Attendees will hear what’s changed the past few years, including weather and availability of tools and models. The session will also discuss alternatives to reinsurance; how to leverage company capital; and implications on stock companies, mutual companies, and single-state and single-county companies.

**Scott Rubenstein**

Managing Director  
Guy Carpenter

**Kimberly Roberts**

Senior Vice President, North America Peril Advisory  
Guy Carpenter

**TUESDAY, SEPTEMBER 19, 2023 (CONTINUED)**

**10:45 AM - 11:30 AM C. What I Wish Insureds Knew About Data Breaches**

Taft's Scot Ganow has years of experience in managing security incidents of all sizes for insureds of all sizes. During this session, he will provide insights into the differences between incidents and breaches, the nature of security-incident management, and what insureds should be doing. The session will also cover the potential liabilities that arise from a breach and the holistic approach needed to respond to an incident.

**Scot Ganow**

Chair, Privacy and Data Security Practice  
Taft Stettinius & Hollister

**10:45 AM - 11:30 AM D. NAMIC Peer Investment Analysis – How Are We Doing?**

*This session qualifies for 1 MDC maintenance credit*

Join this session to review key highlights from the second quarter NAMIC PIPES Report. The speakers will also provide perspective on NEAM's capital market projections as we approach the final months of 2023 and gear up for 2024.

**Christopher Myers**

Enterprise Capital Strategist  
New England Asset Management

**10:45 AM - 11:30 AM E. Sponsor Theater: Xceedance**

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**10:45 AM - 11:30 AM F. Sponsor Theater: Bain Capital**

**10:45 AM - 4:30 PM Optional Activity: U.S. Capitol Tour**

While visiting the U.S. Capitol Visitor Center, you will not only take in the sights of one of the most majestic and perfectly engineered buildings in U.S. history, you will also witness the place where issues facing the nation are considered, debated, and written into law. Just across the street, you will hear from passionate guides ready to share the history of the Library of Congress, touching on the architectural displays and introducing you to some of the world's most treasured items, including the Gutenberg Bible.

## TUESDAY, SEPTEMBER 19, 2023 (CONTINUED)

### 11:30 AM - 12:45 PM **Insurtech Fastpitch on the Marketplace for Mutuals Stage - Tuesday**

This fast-paced and interactive event was created for property/casualty insurance professionals to learn about cutting-edge technology and solutions through short presentations and demonstrations from leading vendors and insurtech companies. This event is included in your registration.

Hear pitches from Chrp Technologies, Guidewire, and Swifter.io.

### 11:30 AM - 1:15 PM **Attendee Lunch - Tuesday**

Join us for lunch, located in the Marketplace for Mutuals. All registered attendees and guests are invited to attend.

### 11:45 AM - 1:00 PM **NAMIC PAC VIP Lunch\***

Join NAMIC PAC and enjoy getting the inside scoop on all things political with Tuesday's keynote speakers, David Axelrod and Karl Rove. RSVP is required. Please stop by Advocacy Central or contact Ingrid Gremillion at [igremillion@namic.org](mailto:igremillion@namic.org) for more information.

*\*Optional Ticketed Event*

### 12:00 PM - 12:45 PM **Sponsor Theater: Xceedance**

Join Xceedance Monday and Tuesday in their Sponsor Theater for a complete immersive experience. Xceedance leadership will be discussing how Xceedance is advancing enterprise transformation and deploying pioneering insurtech to help ensure long-term business success for its clients. There will also be interactive and immersive exhibits and games to enjoy as you take a break from educational sessions for the day.

### 12:00 PM - 12:45 PM **Sponsor Theater: Bain Capital**

### 1:15 PM - 2:00 PM **A. Bringing People Together – How to Help Office, Remote, and Hybrid Teams Thrive**

*This session valid for 0.75 PDC for SHRM-CP or SHRM-SCP recertification*

COVID gave us all a crash course in working on remote teams. This session will discuss ways to improve productivity and team building while incorporating fun regardless of where your team is working.

#### **Tonya DeVane**

Director, Customer Success  
Omnia Group



**TUESDAY, SEPTEMBER 19, 2023 (CONTINUED)**

**1:15 PM - 2:00 PM    B. The Mutual Factor Report – 2023 Update and Summary**

*This session qualifies for 1 FMDC maintenance or elective credit in the Finance & Accounting module*

*This session qualifies for 1 MDC maintenance credit*

This timely session will share highlights from the 2023 Mutual Factor report, which is sponsored by Aon and features key mutual insurance industry performance metrics benchmarked against stock insurers as well as the overall property/casualty insurance industry. It will examine how mutual insurers fared in 2022 and to date in 2023 from financial and rating agency perspectives. This session is designed for executive teams, industry leaders, and board members, all of whom need this kind of data and insights to help guide their respective companies' future decisions.

**Enrico Leo**

Senior Managing Director  
Aon

**Catherine Imus**

Vice President, Public Affairs  
NAMIC

**Sarah Schnettler**

Senior Vice President - Member Experience  
NAMIC

**1:15 PM - 2:00 PM    C. Developing Regulation of AI in the Insurance Sector and How to Respond**

Many states are beginning to regulate the use of algorithmic decision-making systems for underwriting, pricing, and claims handling. This session will discuss these regulatory developments and how insurance companies are responding. It will also discuss options for testing these systems for unfair discrimination and review the standards being used to do so in the absence of clear regulatory guidance.

**Bennett Borden**

Partner  
DLA Piper LLP

**TUESDAY, SEPTEMBER 19, 2023 (CONTINUED)**

- 1:15 PM - 2:00 PM**     **D. Marketing 101: Building a Strong Marketing Foundation in Your Business**  
Marketing is constantly evolving, with new tactics and trends emerging all the time. But amidst all the change, one thing remains constant: foundational principles of marketing.  
  
Basic marketing principles lay the groundwork and help new marketing strategies and tactics thrive. In this session, Dani Kimble will share essential principles and practices that underpin effective marketing and explore how these principles can help guide your marketing efforts as the landscape of marketing continues to evolve.  
  
**Dani Kimble**  
Founder & CEO  
Azelle Marketing
- 1:15 PM - 2:00 PM**     **E. Sponsor Theater: Xceedance**  
Join Xceedance Monday and Tuesday in their Sponsor Theater for a complete immersive experience. Xceedance leadership will be discussing how Xceedance is advancing enterprise transformation and deploying pioneering insurtech to help ensure long-term business success for its clients. There will also be interactive and immersive exhibits and games to enjoy as you take a break from educational sessions for the day.
- 1:15 PM - 2:00 PM**     **F. Sponsor Theater: Bain Capital**
- 2:00 PM - 3:30 PM**     **Afternoon Social and Exhibitor Prize Drawings in the Marketplace for Mutuals**  
Join us during our final activity in the Marketplace for Mutuals, an afternoon social. Attendees can enjoy snacks and learn who has won exhibitor prize drawings.
- 3:30 PM - 4:00 PM**     **Marketplace for Mutuals Closes and Exhibitor Move-Out**
- 3:30 PM - 4:30 PM**     **NAMIC PAC Silent Auction Closing Reception**
- 5:15 PM - 8:45 PM**     **Optional Activity: Monument Boat Tour – Sponsored by Epoq**  
You will be welcomed aboard a private vessel to cruise the Potomac River and take in D.C.'s most iconic sights. See stunning reflective views of the Thomas Jefferson Memorial, the John F. Kennedy Center for the Performing Arts, the Washington Monument, Arlington Memorial Bridge, and more. \*This activity does not include dinner\*

## WEDNESDAY, SEPTEMBER 20, 2023 (IN EST)

- 7:15 AM - 9:00 AM Property Casualty Conference Senior Executives Roundtable Breakfast\*\***  
Senior executives and future leaders from NAMIC Property Casualty Conference member companies are invited to join us for a roundtable discussion on issues impacting their businesses. Attendees will have the opportunity to suggest topics and lead discussions in small groups based on company size.  
*\*\*By Invitation Only*
- 7:15 AM - 9:00 AM Professional Farm Mutual Manager Roundtable Breakfast\*\***  
Certified Professional Farm Mutual Managers are invited to participate in a roundtable discussion on current issues. The NAMIC PFMM designation formally recognizes the educational accomplishments and dedication to professionalism of the progressive farm mutual manager. To become certified, individuals must fulfill several requirements and complete a series of courses.  
*\*\*By Invitation Only*
- 7:15 AM - 9:00 AM Farm Mutual Director Certification Roundtable Breakfast\*\***  
This session qualifies for 1 FMDC maintenance credit  
Certified Farm Mutual Directors are invited to participate in a roundtable discussion on current issues. Newly certified FMDC designees are also invited to this breakfast. The FMDC program formally recognizes the educational accomplishments and dedication to professionalism of the progressive farm mutual director. To become certified, individuals must fulfill several requirements and complete a series of courses.  
*\*\*By Invitation Only*
- 7:15 AM - 12:00 PM Registration and Event Information Desk - Wednesday**  
The NAMIC Event Information Desk is the central location for getting your questions answered and picking up pre-registered attendee packets.

WEDNESDAY, SEPTEMBER 20, 2023 (CONTINUED)

9:15 AM - 1:00 PM

**Optional Activity: Smithsonian Museums Excursion**

Founded in 1846, the Smithsonian Institution is the world's largest museum, education, and research complex. A shuttle will drop off guests at the National Mall from which they can take short walks to any of the following free museums:

- National Air and Space Museum
- National Museum of American History
- National Museum of Natural History
- National Museum of African American History
- National Museum of the American Indian
- National Gallery of Art
- Hirshhorn Museum and Sculpture Garden

9:30 AM - 10:15 AM

**Power Session: Implications and Solutions to the Chronic Deficit – Why Innovation, Growth, and Government Reform are Key Factors to Averting a Debt and Societal Crisis: A Conversation With Former Indiana Governor Mitch Daniels**

With more than 40 years of successful economic stewardship in the private and public sectors, Mitch Daniels — the highly regarded two-term governor of Indiana and former director of the Office of Management and Budget — will examine the economic reforms needed to revitalize the ailing financial system, refuel optimism, address debt and deficit reduction, and successfully navigate the tides of a rapidly evolving world. Mitch provides audiences with a candid, multidimensional, solutions-oriented perspective stressing the importance of innovation and fostering growth while offering thought-provoking dialogue about the implications of chronic deficit and even more intrusive and expansive government for democratic institutions.

**Mitch Daniels**

Former President of Purdue University; Governor of Indiana (2005-2013) and Director of the Office of Mgmt and Budget

**WEDNESDAY, SEPTEMBER 20, 2023 (CONTINUED)**

**10:15 AM - 11:15 AM Closing Keynote: On the Edge - The Art of High-Impact Leadership**

*This session valid for 1.0 PDC for SHRM-CP or SHRM-SCP recertification*

Imagine yourself on the highest mountain in the world. You must deal with the physiological effects of extreme altitude along with bone-chilling temperatures, battering winds, and a climbing team that's counting on all its members to make smart decisions. There's simply no room for poor judgment — one mistake or misstep can result in an “unrecoverable error.” In any situation where lives are on the line or the stakes are exceptionally high, there's no better training ground for leaders than settings where people are pushed beyond their perceived limits. During the final keynote of Convention, Alison Levine will detail her experience as team captain of the first American women's Everest expedition and make a compelling case that leadership principles that apply in the world of extreme adventure also apply to today's rigorously competitive business environments.

**Alison Levine**

First American Women's Everest Expedition Team Captain, faculty member at the Thayer Leader Development Group at West Point, New York Times bestselling author of *On the Edge*

**10:30 AM - 4:45 PM Optional Activity: Mount Vernon VIP Tour - Wednesday**

Discover the home of America's first First Family. Past lantern-lit lanes, George Washington's estate unfolds to reveal the lush grounds and majestic views of the Potomac River that enshrine historic Mount Vernon with beauty, innovation, and untold history.

You will get an intimate look behind the scenes of the mansion, including the normally off-limits-to-the-public basement, Mount Vernon's original outbuildings, and the manicured grounds surrounding it. This tour is partially outdoors and involves walking.

**11:30 AM - 4:00 PM NAMIC Board Meeting\*\***

*\*\*By Invitation Only*

**12:00 PM - 4:30 PM NAMIC PAC Optional Activity: Washington Nationals Baseball Game**

Please email Ingrid Gremillion at [igremillion@namic.org](mailto:igremillion@namic.org) to register for this activity.

## WEDNESDAY, SEPTEMBER 20, 2023 (CONTINUED)

### 12:15 PM - 4:30 PM **Optional Activity: Arlington National Cemetery**

Honor, respect, and the 24 lingering bugle notes of “Taps” resonate on the grounds of the Arlington National Cemetery. America is the “land of the free and the home of the brave,” and as the final resting place of America’s most distinguished heroes, Arlington National Cemetery represents eternal dignity and reverence. Though notable figures are buried among the white tombstones, the grounds also intern astronauts, nurses, chaplains, war correspondents and unknown. Technology enabled exploration allows for the locating of sites, like Arlington House, the former home of Robert E. Lee, seeing the emotional “changing of the guard” ceremony at the Tomb of the Unknowns, getting walking directions and accessing photos all while reflecting on the names, and pondering their stories. This tour is mostly outdoors and involves walking.

### 12:30 PM - 3:30 PM **PFMM: Reinsurance**

*This session is required as part of the Financial Management module for those working toward the PFMM designation.*

During this session, we will explore the basics of reinsurance by defining it and reviewing its various functions. We will also discuss the services provided by reinsurers through their partner relationships with mutual company clients. Additionally, we will look at differing types of reinsurance and the ways in which they can be structured to provide proper protection for companies’ various risks. During the second part of the reinsurance series, we will move to an overview of reinsurance contract language, highlighting some of the more important clauses. We will review the methods reinsurers use in their pricing and how they might provide profit sharing to clients. During the final installment in the reinsurance series, we will focus on the many ways reinsurance is marketed.

**Molly Fogarty**  
Managing Director  
Aon

### 5:00 PM - 6:00 PM **NAMIC PAC Diamonds and Champagne Reception\***

*\*Optional Ticketed Event*

### 6:00 PM - 8:30 PM **Closing Celebration**

Join us on the banks of the Potomac River for the Closing Celebration, sponsored by Gen Re. You can expect to spend the evening relaxing, enjoying live music, sampling local flavors at a variety of food stations, and taking in a fireworks display to close out your Convention experience with a bang.

Closing Celebration is included for all Convention registrants. If you’d like to purchase a ticket for a non-registered guest, please refer to the Edit link in your registration confirmation email.