22nd Annual New England Chapter Education Day

Wednesday, June 6, 2018
Publick House
277 Main Street
Sturbridge, MA 01566
800-782-5425

Registration Fee includes: Breakfast, Lunch, and two Refreshment Breaks

Members	Non-Members
$140	$160

Registration form and payment must be **received** by **May 23, 2018**

Highlights include:

- Registration and hot breakfast, followed by opening remarks
- Breakout sessions on a multitude of relevant topics
- Networking lunch with Keynote Speaker Elizabeth Kelleher Dwyer, Rhode Island Superintendent of Insurance
- Regulators from the following states will be attending: CT, MA, ME, NH, NJ, RI and VT. Representatives from SERFF and IIPRC also attending.
- Opportunity to submit questions to Regulators on the Hot Topics panels
- Access to some of the insurance industry's top exhibitors and consultants who will be available throughout the day to meet with you and demonstrate their premium products and services

Please complete and submit your registration today. Space is limited to the first 150 registrations received. All registrations must be received by May 23, 2018!!!

Accommodations:
Publick House
277 Main Street Sturbridge, MA 01566
Tel: 800-782-5425
http://www.publickhouse.com

Online booking available for the Publick House. Use code 0518IP. Please note negotiated rates are $129 single or double occupancy plus tax. Or call 800-782-5425 and request the room block E-Day Conference in order to receive the group rate. To secure the reduced rate you must book by **May 19, 2018**.

AICP New England Chapter
22nd Annual Education Day
Registration Form

Registrant Information

Registrant:		Telephone:	
Registration:	☐ Member $140 ☐ Non-Member $160	Line of Business:	☐ Property & Casualty ☐ Life & Health ☐ Life Only ☐ Health Only
Company:			
Email address:			

Special needs (please indicate any special dietary or other needs):

Session Choices (please review the agenda and description of the sessions, and select one from each session group):

Session I: ☐ 1 ☐ 2 ☐ 3 ☐ 4 Session II: ☐ 5 ☐ 6 ☐ 7 ☐ 8

Session III: ☐ 9 ☐ 10 ☐ 11 Session IV: ☐ 12 ☐ 13 ☐ 14 ☐ 15

Payment Information (please note: payment must be received by May 23, 2018)

Payment by check:

☐ Check enclosed

☐ Check to follow, please reserve my space

Please note, if you have to wait for your company to cut a check, you may reserve your space at E-Day by e-mailing Melissa Pomerene at mpomerene@drohanmgmt.com.

All checks should be made payable to: AICP - New England Chapter

Payment by credit card:

☐ American Express ☐ Visa ☐ MasterCard

Card Holder:			
Card Number:		Expiration:	
Signature:		Date:	

Payment by credit card:

If you are paying by credit card you are encouraged to register online by logging into www.aicp.net. If you do not have a login or need assistance registering online, please contact Melissa Pomerene at (703) 234-4085 or mpomerene@drohanmgmt.com.

Cancellation Policy

Cancellation requests made prior to May 19th will receive a full refund of the registration fee. Cancellations received after May 20th are not eligible for a refund.

Speaker Questions

Please submit questions you would like addressed during any of the presentations, but especially for the hot topics sessions. If there is a specific speaker to whom you wish to address the question, please indicate so. (If more room is needed for questions, please attach separate page.)

Session/Speaker: ☐ P&C ☐ L&H

Question:

Session/Speaker: ☐ P&C ☐ L&H

Question:

Session/Speaker: ☐ P&C ☐ L&H

Question:

Luncheon Meal Selection

Lunch will be plated. Please select from the following meal options:

☐ Roasted Turkey
☐ Yankee Pot Roast
☐ Grilled Salmon
☐ Special Dietary Needs

AICP New England Chapter
22nd Annual Education Day
Agenda

8:00 – 8:45 am		Registration and Continental Breakfast
8:15 – 8:45 am		Opening Remarks: Rachel Galasso, New England Chapter President & Sara Thomas, New England Regional Director
8:45 – 10:00 am		**Session I: (concurrent)**
	Type of Insurance	**Topic**
1	Combined	The 2017 Tax Act - Much Change, Little Reform Implications for Insurance Companies & Contracts
2	P&C	ISO's New PAP: Flying Cars, Pets and Property… Oh My!
3	L&H	Insurance Compact Update
4	Combined	Day in the Life of an Insurance Lobbyist - Hot Topics in the Northeast
10:00 - 10:15 am		**Refreshment Break, Networking and Vendor Meet and Greet**
10:15 – 11:30 am		**Session II: (concurrent)**
	Type of Insurance	**Topic**
5	Life and Annuity	NY Suitability - What Just Happened?
6	Combined	Corporate Governance Annual Disclosure Model Act
7	P&C	Hot Topics – Regulator Panel: CT, MA, ME, NH, NJ, RI & VT
8	L&H	Regulator Roundtable: CT, MA, ME, NH, RI, VT, IIPRC & SERFF
11:30 – 11:45 am		**Networking and Vendor Meet and Greet**
11:45 – 12:45 pm		**Networking Lunch & Keynote Speakers: Elizabeth Kelleher Dwyer, RI Superintendent of Insurance & Lee Davidson, AICP President. ICP.**
12:45 – 2:00 pm		**Session III: (concurrent)**
	Type of Insurance	**Topic**
9	P&C	Private Flood Programs and Compliance: Don't Get Swamped
10	P&C	Regulator Roundtable: CT, MA, ME, NH, NJ, RI, VT & SERFF
11	L&H	Hot Topics – Regulator Panel: CT, MA, ME, NH, RI, and VT
2:00 – 2:30 pm		**Refreshment Break – Make Your Own Sundae & cookies**
2:30 – 3:45 pm		**Session IV: (concurrent)**
	Type of Insurance	**Topic**
12	L&H	Walking the Compliance Minefield and Surviving the Market Conduct Exam
13	Combined	Filings Made Easy … Or Not?!
14	P&C	Cat Modeling - More Than a Feline
15	Combined	Privacy/Cyber Security
3:45 – 4:00 PM		**Closing Remarks and Raffle**

Dress for Education Day is business casual.

CE Credit Reporting Process - CPCU attendees can self-report at www.cpcusociety.org or www.theinstitutes.org. Any person holding a CLU designation will need to self-report the CE hours through their American College portal accounts.

Completed registration forms and checks should be sent to:
AICP/ New England Chapter
11130 Sunrise Valley Drive, Ste. 350
Reston, VA 20191

Session 1 (LOB: Combined) New 2017 Tax Act - Much Change, Little Reform Implications for Insurance Companies & Contracts

For many years Congress has considered proposals to reform and simplify the Tax Code. The 2017 Tax Act reduced both individual tax rates and the corporate tax rate from 35% to 21%. It did not simplify the Code. The tax benefit of the rate reduction was offset in part by changes to many other corporate tax provisions, including international tax provisions. For more than 30 years insurers have been subject to special provisions affecting the treatment of reserves, acquisition expenses, dividends tax-exempt income, and net operating losses. The 2017 Tax Act made changes to all of these provisions. This session will review these changes, as well as many others. There are many special provisions affecting the tax treatment of insurance contracts. While these provisions were not changed, the tax benefits of these provisions are affected by the changes in individual tax rates.

Presented by:
Walter C. Welsh, UConn School of Law

Session 2 (LOB: P&C) ISO's New PAP: Flying Cars, Pets and Property… Oh My!

The use of cars is evolving, as are the coverage needs of insureds. In this session, you'll learn how and why ISO is responding to these changes in its 2018 countrywide Personal Auto Program revision. Learn about new options such as Pet Insurance, Personal Property Insurance, and Replacement Cost Coverage in the ISO Personal Auto Program.

Presented by:
Sandee Perfetto, ISO

Session 3 (LOB: L&H) Insurance Compact Update

This session will provide an update on the Insurance Compact (aka The Interstate Insurance Product Regulation Commission or the IIPRC), including the most recent filing statistics, trends and information on new members of the Compact.

Presented by:
Edward Charbonnier, IIPRC

Session 4 (LOB: Combined) Day in the Life of an Insurance Lobbyist - Hot Topics in the Northeast

You may or may not know what happens in the life of a northeast trade association or insurance company lobbyist.

Come and hear about the latest topics your representatives are discussing with regulators and legislators alike.

Presented by:
Alison Cooper, AIA
Susan Giacalone, AIG
Frank O'Brien, PCI
Cate Paolino, NAMIC

Session 5 (LOB: L& Annuity) NY Suitability- What Just Happened?

When NY announced its new proposed Regulation 187, it came out of nowhere. Suitability on life insurance? Suitability on in-force elections? What is NY thinking? In this session, we can't promise to get inside the minds of the NY regulators, but we will go through the regulation (there may be a new draft by E-day) and discuss what the implications will be as we move towards implementation. A lively discussion is encouraged.

Presented by:
Cailie Currin, Currin Compliance Services

Session 6 (LOB: Combined) Corporate Governance Annual Disclosure Model Act

Bill Goddard will share his expertise about the Corporate Governance Annual Disclosures Model Act.

Presented by:
William (Bill) Goddard, Partner- Day Pitney & Instructor, UConn School of Law

Session 7 (LOB: P&C) Hot Topics

Join our distinguished panel of regulators as they share pertinent information on hot topics affecting Property & Casualty insurance today.

Presented by:
George Bradner – CT Insurance Department
Sheri Cullen – MA Division of Insurance
Ben Yardley – ME Bureau of Insurance
John Elias – NH Insurance Department
Mark McGill, NJ Dept of Banking and Insurance
Paula Pallozzi – RI Division of Insurance
Kevin Gaffney – VT Insurance Division

Session 8 (LOB: L&H) Regulator Roundtables

Here's your chance to discuss pertinent and important issues with state insurance regulators on a small group basis. Spend 15 minutes with each regulator dialoguing in a more intimate setting with just a few of your compliance colleagues.

States and orgs participating: CT, ME, MA, NH, RI, VT, IIPRC & SERFF.

Session 9 (LOB: P&C) Private Flood Programs and Compliance - Don't Get Swamped!

With many changes and events taking place, such as hurricanes Harvey, Irma and Maria, and the reauthorization of NFIP, ISO is developing solutions and tools to assist insurers looking to enter the private flood insurance market. We will discuss the recent filings made by ISO for both Commercial and Personal Lines (Forms, Rules and Loss Costs) along with the products made available in those filings, as well as those that are still in development, for underwriting the hazards of flood.

Presented by:
Marc Treacy, ISO

Session 10 (LOB: P&C) Regulator Round Tables

Here's your chance to discuss pertinent and important issues with state insurance regulators on a small group basis. Spend 15 minutes with each regulator dialoguing in a more intimate setting with just a few of your compliance colleagues.

States and orgs participating: CT, ME, MA, NH, NJ, RI, VT & SERFF.

Session 11 (LOB: L&H) Hot Topics

Join our distinguished panel of regulators as they share pertinent information on the hot topics affecting the Life & Health insurance industry.

Presented by:
Paul Lombardo – CT Insurance Department
Matthew Mancini – MA Division of Insurance
Pamela Stutch – ME Bureau of Insurance
Michael Wilkey – NH Insurance Department
Sarah Neil – RI Division of Insurance
Phil Keller – VT Insurance Division

Session 12 (LOB: L&H) Walking the Compliance Minefield and Surviving the Market Conduct Exam

Explore the regulatory compliance risks for the life and health companies and emerging trends, methods of measuring compliance and key regulatory challenges. Discuss the examination process and the areas of focus for life and health examinations and multi-state examinations. Provide examination tips and methods to develop a culture of compliance.

Presented by:
Matt Gendron, RI Division of Insurance
Jennifer Osborn Nix, Polsinelli PC

Session 13 (LOB: Combined) Filings Made Easy…. or Not?!

From filing laws to checklists (and everything in between), compliance professionals responsible for product filings deal with multiple requirements and timeframes. This session will provide regulatory and industry perspectives, with a focus on helpful suggestions for making your filings “easier”!

Presented by:
George Bradner, CT Insurance Department
Kathy Donovan, Wolters Kluwer
Sarah Neil, RI Division of Insurance

Session 14 (LOB: P&C) Cat Modeling - More than a Feline

We will share information and insight about the art of modeling natural catastrophes. The cat modeling industry has been serving insurers, reinsurers and others in the financial sector for over 30 years by tackling one of the most unpredictable and volatile parts of risk management. In this session you can expect floods, hurricanes and earthquakes!!

Presented by:
Brandie Andrews, AIR
Christy Shang, AIR

Session 15 (LOB: Combined) Privacy and Cyber Security

Learn about the do's and don'ts of Privacy in the insurance industry. We will also discuss regulatory mandates as they relate to Cyber Security and how they impact company processes and procedures.

Presented by:

Elizabeth Kelleher Dwyer, RI Superintendent
Matthew Fitzsimmons, Cigna