

PROGRAM BOOK

Narwick Melrose MAY 1-2, 2024



WWW.PRIVATECLIENTCOUNCIL.COM

ELEVEN YEARS

May 1, 2024

Welcome to the 11th annual CIPC Conference

On behalf of MarketScout, a division of Novatae Risk Group, it is my pleasure to extend a warm welcome to you and all attendees of the CIPC Conference. We are honored you chose to be part of this prestigious gathering of industry leaders, experts, and innovators in the field of private client insurance services.

The CIPC was formed twelve years ago as the very first association focusing on private client insurance and risk management. We continue to offer unparalleled insights, networking opportunities, and discussions on the latest trends and challenges facing our industry. With an impressive lineup of speakers and panelists, as well as interactive sessions and workshops, this conference is sure to provide invaluable knowledge and inspiration to all of you.

Together, we can explore innovative strategies, exchange best practices, and forge new partnerships that will elevate our collective efforts in serving the needs of our clients with excellence and integrity.

I encourage you to take full advantage of all that the CIPC Conference has to offer. Whether you are a seasoned professional or a newcomer to the industry, there is something for everyone to gain from this enriching experience.

Once again, welcome to the CIPC Conference. We look forward to engaging with you, sharing insights, and building lasting connections that will propel our industry forward.

Sincerely,

Richard Kerr Chief Executive Officer Novatae Risk Group



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Antitrust Compliance Statement

We are setting forth this statement to help prevent any violation of antitrust laws. All recipients must remember that their respective firms are competitors in the marketplace and that the McCarran-Ferguson Act and the laws of some states provide the insurance industry with only very limited immunity from federal and state antitrust scrutiny. Therefore, those in attendance must exercise care during all presentations and discussions, since even innocuous discussions of certain topics might later be misinterpreted as evidence of collusion. Discussions or sharing of competitive information is prohibited.

For purposes of this discussion, "competitive information" includes, but is not limited to, information concerning:

- any information related to ratemaking or pricing including strategies or plans
 discussions about reasonable profit levels

- credit terms and other price-related or ancillary terms
 market allocation
- · the concerted refusal to deal with a customer, supplier, competitor; or to provide an insurance product or service
- decisions to quote or not to quote on certain types or classes of risks
- · raising, lowering, or stabilizing rates; and
- any issues concerning how agents or insurers compete amongst themselves

Help to enforce this policy and speak up if you have concerns about the conversation.





WEDNESDAY, MAY 1, 2024

11:30 PM - 1:00 PM	Check-In (Turtle Creek Ballroom Foyer)
1:00 PM - 1:15 PM	Welcome & Opening Remarks (<i>Turtle Creek Ballroom</i>) Richard Kerr, Chief Executive Officer, Novatae Risk Group
1:15 PM - 2:15 PM	Panel: Where and How Do We Get and Retain Capacity? (Turtle Creek Ballroom)
	Moderator: Robert Larocca, Chief Strategic Relations Officer, SterlingRisk
	Speaker/Panelist 1: Will Van Den Heuvel, SVP, The Cincinnati Insurance Company
	Speaker/Panelist 2: Jill Arnold Bull, President, Private Risk Solutions, Lockton Companies
	Speaker/Panelist 3: Scott Teller, Executive Underwriting Officer, Chubb Personal Risk Solutions
2:15 PM - 3:15 PM	Panel: Is Now a Good Time to Open a New High-Net-Worth Agency? (Turtle Creek Ballroom)
	Moderator: Kate Norris, Founder and Chief Executive Officer, Atténuer Risk
	Speaker/Panelist 1: Lei Redding, Founder, Redding Private Client
	Speaker/Panelist 2: Celia Santana, President & CEO, Personal Risk Management Solutions
	Speaker/Panelist 3: Dale Krupowicz, Chief Operating Officer, Partner, Personal Risk Management Solutions
3:15 PM - 3:45 PM	Networking Break (Turtle Creek Ballroom Foyer) Sponsored by Sedgwick
3:45 PM - 4:45 PM	Panel: Tech Empowerment in High-Net-Worth Insurance (Turtle Creek Ballroom)
	Moderator: Kurt Thoennessen, CEO, RiskRevu
	Speaker/Panelist 1: Sherilyn Jammé, Principal, Newfront
	Speaker/Panelist 2: Rick Hiebert, Head of Partnerships, Wondeur Al Solutions
4:45 PM - 5:15 PM	Session: Insights on Family Offices (Turtle Creek Ballroom)
	Speaker: Kate Norris, Founder and Chief Executive Officer, Atténuer Risk
5:15 PM - 6:30 PM	Welcome Cocktail Reception (Pool Deck) Sponsored by MarketScout Private Client Solutions, a division of Novatae Risk Group

THURSDAY, MAY 2, 2024

7:00 AM - 8:00 AM	Breakfast (Turtle Creek Ballroom Foyer)
8:00 AM - 9:00 AM	Keynote: Unveiling the Current Landscape: State of the Industry (Turtle Creek Ballroom)
	Speaker: Phil Trem, President-Financial Advisory, MarshBerry
9:00 AM - 10:00 AM	Panel: Building Your Team (Turtle Creek Ballroom)
	Moderator: Nick Ross, Senior Vice President, Acrisure
	Speaker/Panelist 1: Jacqueline Stephens, Senior Director Agency Centre, Acrisure
	Speaker/Panelist 2: Jeff Owens, Associate Manager, Cincinnati Insurance
	Speaker/Panelist 3: Paul Schriefer, Associate Lecturer, Florida State University
10:00 AM - 10:30 AM	Networking Break (Turtle Creek Ballroom Foyer) Sponsored by Sedgwick
10:30 AM - 11:30 AM	Panel: Parametric Coverage: Is this the Property CAT Solution? (Turtle Creek Ballroom)
	Moderator: LoriAnn V. Lowery-Biggers, Chief Executive Officer, Triumph Capital Holdings
	Speaker/Panelist 1: Andrew Siffert, Senior Vice President/Senior Meteorologist, BMS Re Catastrophe Analytics
	Speaker/Panelist 2: David Stamatis, Business Development Manager, Descartes Underwriting
	Speaker/Panelist 3: Vicki Kemp, Account Executive, Private Risk Solutions, Lockton Companies

CONFERENCE INFORMATION

Check-In Desk

The CIPC Registration Desk will be located in the Turtle Creek Ballroom Foyer of The Warwick Melrose Hotel.

Networking Breakfast & Refreshment Breaks

Breakfast and refreshment breaks will be served. Check the agenda for details.

Name Badges

Your name badge is your entry into all sessions and networking events; please wear it at all times.

Exhibitor Lounge

Exhibit tables are located in the Turtle Creek Ballroom Foyer and will be open from Wednesday, May 1 through Thursday, May 2 during all session hours.

Mobile Phones

As a courtesy to speakers and panelists, please ensure that all mobile phones are turned to silent during sessions.

Program Changes

Announcements of changes to the schedule will be made on the main screens in the Turtle Creek Ballroom. The conference organizers cannot be held responsible for any program changes due to external or unforeseen circumstances.

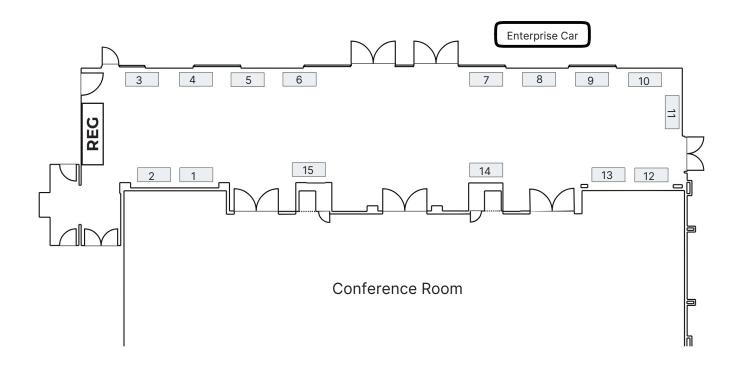
Attendees with Special Needs

Every effort will be made to accommodate those with special needs. Should you require assistance, please see the Check-In Desk.

Welcome Cocktail Reception

CIPC Conference Welcome Cocktail Reception on May 1 from 5:15 - 6:30 PM on the Pool Deck.

EXHIBITOR MAP



- REG Registration8. Art Peritus1. Go Rentals9. Mexipass2. Leak Defense10. Palomar3. ModernMetric11. The National Alliance4. Prime12. Mueller Reports5. Flologic13. Neptune Flood6. Castle High Value14. Private Client Select7. Enterprise Holdings15. MarketScout, a division
 - 15. MarketScout, a division of Novatae Risk Group

ADVISORY BOARD

Jennifer Alimonda, CAPI Director of Private Client Group SterlingRisk

Ronald R. Assise, CIC, CPRM *President* The Horton Group

Lauren R. Bailey, CPCU President, Central Zone Private Client Select

Steve Brown Head of Acrisure Personal Risk Acrisure Southwest Region

Jill Arnold Bull, CAPI *President, Private Risk Management* Lockton Companies

Courtney Kerr Brooks, CPRM, CISR Senior Vice President, Private Client Solutions Novatae Risk Group

Richard Kerr

Chief Executive Officer Novatae Risk Group Ellen Kroesen Vice President, Sales & Distribution Training Manager Chubb Personal Risk Services

Robert F. Larocca *Chief Strategic Relations Officer* SterlingRisk

LoriAnn V. Lowery-Biggers Chief Executive Officer Tirumph Capital Holdings

Kate Norris, CPRM, CPRIA, CAPI Founder and Chief Executive Officer Atténuer Risk

Nick Ross, CAPI Senior Vice President Acrisure Private Risk Advisors

Laura Sherman, CAPI, CPRM *Founding Partner* Baldwin Krystyn Sherman Partners (BKS-Partners)

Kurt Thoennessen Chief Executive Officer RiskRevu

Stacy Warren *Chief Operating Officer* Lockton Companies

SPONSORS

Founder

MarketScout

MarketScout, a division of Novatae Risk Group is a national MGA and wholesale broker headquartered in Dallas, Texas with a commitment to providing exceptional technical and market expertise for insuring private clients. As a Lloyd's Coverholder and MGA, they administer an exclusive homeowners program for members of the CIPC. MarketScout, a division of Novatae Risk Group is an MGA for commercial and personal exposures including collectibles, animal mortality, workers compensation, energy, professional and many other exposures.

More information is available on the MarketScout Exchange at www.marketscout.com.

Diamond Sponsors



Bishopsgate Insurance Brokers is an independent insurance broker, focused on classes of business where the London Market provides significant global expertise and capacity for clients. We are a dynamic and fast-growing business, dedicated to providing our clients with the solutions they require. Today Bishopsgate specialises in UK and Ireland Commercial, North America Programmes, International Casualty and programmes, and Professional Financial and Cyber for clients. Working through our dedicated MGA network and with some of the strongest capacity providers in London, we are transforming how MGAs interact with markets utilising our state-of-the-art digital environment ("Edge") which was developed inhouse and allows granular analysis of data assisting in the development of portfolios. We are part of the Ardonagh Group. Ardonagh is one of the largest broking and underwriting groups in the UK, with global reach and employing more than 11,000 people. We are perfectly placed to offer a bespoke and personalised service, underpinned by the financial security which comes from belonging to a growing and diversified group.

For more information, visit www.bishopsgateinsurance.co.uk

At Chubb, we assess, assume and manage risk with insight and discipline. Chubb is a world leader in insurance. With operations in 54 countries and territories, Chubb provides commercial and personal property and casualty insurance, personal accident and supplemental health insurance, reinsurance and life insurance to a diverse group of clients. As an underwriting company, we assess, assume and manage risk with insight and discipline. We service and pay our claims fairly and promptly. We combine the precision of craftsmanship with decades of experience to conceive, craft and deliver the very best insurance coverage and service to individuals and families, and businesses of all sizes. Chubb is also defined by its extensive product and service offerings, broad distribution capabilities, directto-consumer platform partnerships, exceptional financial strength and local operations globally. The company serves multinational corporations, mid-size companies and small businesses with property and casualty insurance and risk engineering services; affluent and high net worth individuals with substantial assets to protect; individuals purchasing life, personal accident, supplemental health, homeowners, automobile and specialty personal insurance coverage; companies and affinity groups providing or offering accident and health insurance programs and life insurance to their employees or members; and insurers managing exposures with reinsurance coverage. Chubb has more than \$225 billion in assets and reported \$57.5 billion of gross premiums written in 2023. Chubb's core operating insurance companies maintain financial strength ratings of AA from Standard & Poor's and A++ from AM Best. Chubb Limited, the parent company of Chubb, is listed on the New York Stock Exchange (NYSE: CB) and is a component of the S&P 500 index. Chubb maintains executive offices in Zurich, New York, London, Paris and other locations, and employs approximately 40,000 people worldwide.

Website url: www.chubb.com/us-en/individuals-families.html

Private Client

Private Client Select is an industry leading underwriter for high- and ultra-high-net-worth individuals. We find solutions for their most complex assets and passions using our innovative products, cutting-edge risk services, and creative approach to underwriting with both admitted and non-admitted products.

For more information, visit www.privateclientselect.com



For years, most people didn't understand risk, insurance, or the policies themselves. Yet, back in 1969, a small group of Texas independent agents knew the truth: With a structured curriculum and practical, real-life education beyond theory, they could ignite an entire industry of skilled professionals. Together with University of Texas educators, these pioneering agents formed the industry's first nonprofit training and CE credit resource. The National Alliance was born. Along the way, we've built a genuine community of professionals who succeed and thrive. For decades, we've impacted millions of professionals with our practical education. Like us, they're dedicated to lifelong learning and collaboration. Our participants understand their career potential and gain a real workplace advantage. Today, our education and networks continue to evolve and expand. We are trusted to lead the risk management and insurance industry through change. The National Alliance ensures no one must go it alone. We've made success a group activity.

For more information, visit **www.scic.com**

Castle High Value Surveys

For over 20 years Castle has been regarded as the nation's leading provider of high value surveys. 8 of the top 10 High Net Worth writers trust Castle to knowledgeably and professionally represent their company and their brokers. We do not just gather data we have the technical expertise to identify a home's high-end features, and intelligently calculate an accurate and defensible replacement value. Castle consultants will suggest loss prevention measures where applicable and can always be trusted to treat your customers with the utmost respect and professionalism.

Learn more about Castle High Value Surveys at Castle High Value property insurance surveys, solutions, and services | EXL (www.exlservice.com)

Enterprise Holdings

Enterprise Mobility has been moving mobility forward for more than 65 years. Today, with a fleet of more than 2.3 million vehicles, Enterprise Mobility provides a full spectrum of mobility services, including Exotic Car Collection by Enterprise. Founded in 2006 as an extension of Enterprise Rent-A-Car to meet customer demand for luxury vehicle rentals, the Exotic Car Collection by Enterprise features one of the largest selections of premium, high-end rental vehicles from some of the world's top manufacturers. All Exotic Car Collection customers experience Enterprise's signature customer service, including delivery and collection of vehicles. With our impressive range of premium luxury and performance vehicles, customers experience a thrill that stays with them long after the rental return.

www.enterpriseholdings.com



Hanover

Experience partnership based on trust. Dedicated to the success of the independent agency channel, The Hanover serves our partners with unparalleled sales insights and total account solutions for home, auto, valuables, toys and more. Hanover Prestige is our distinctive brand of personal insurance options for your customers with homes valued up to \$3M. We combine powerful yet flexible protection with caring service backed by designated high-value underwriting and claims expertise. This unique approach gives our agency partners a distinct advantage in this market, and has positioned us as a top 10 insurance company in the \$750k to \$3M high-value insurance segment.



CASE LE HIGH VALUE SURVEYS an EXL company



Insight Catastrophe Managers

Our mission is to help clients maximize the use of their commercial catastrophe model licenses (e.g., RMS, Verisk) by automating catastrophe analyses for faster Property Underwriting decision making. What makes Insight so unique is we can return Pre-Bind account-level metrics beyond the Catastrophe model output, such as "patented" PML marginal impacts, reinsurance marginal impact, Target and Breakeven Premiums. We also provide Portfolio and Advanced Underwriting Analytic services and Catastrophe Model Hosting Services in AWS. Our current client base consists of a Top 10 Multi-National Private Client and E&S Carrier, a Top 3 U.S. Wholesaler, and other Carriers, MGAs, and MGUs of various sizes.

www.ica360.com

Tokio Marine Highland

TMH private flood solutions offer higher limits, broader coverages and more stable and competitive rates than what is available from the National Flood Insurance Program (NFIP). With more than 25 years at the forefront of private flood insurance, best-in-class service and deep expertise in private flood program administration, you can be confident in presenting your customers with our specialized primary, excess and admitted flood solutions.

www.tokiomarinehighland.com

StaffBoom

Staff Boom is an outsourcing solutions provider that focuses on delivering customized solutions and consultancy services exclusively tailored for insurance agencies, wholesale brokers, and MGAs. Our goal is to assist you in optimizing your operations, reducing costs, and mitigating unforeseen expenses and liabilities. Crafted by insurance professionals, for insurance professionals, our team is dedicated to meeting your unique needs. When you partner with Staff Boom, you gain access to a team who is exclusively dedicated to your company and since we understand the importance of flexibility, your team can adapt to your preferred work schedule. With Staff Boom, you can rely on a team that consistently delivers exceptional results, even when faced with the most challenging tasks.

www.staffboom.com





Specialty Property • Fine Art • Flood Solutions



Name Badges

MSI

Millennial Specialty Insurance, LLC ("MSI") is one of the largest non-carrier-affiliated Managing General Agencies (MGAs) inthe United States. Combining expert underwriting with industry-leading technology, MSI creates a superior insurance experience for carriers, distribution partners, and customers. MSI collaborates with insurance carriers to design and distribute products through agents, brokers, and technology partners. Founded in 2015, MSI has grown to offer a wide range of insurance products across commercial, specialty, and personal lines. In 2019, MSI joined BRP Group, Inc. (NASDAQ: BRP). www.msimga.com

Networking Breaks

Sedgwick

As an authorized third-party administrator (TPA) that has delegated authority, Sedgwick delivers a superior customer service experience through fast, fair and accurate claim adjustments for every insured.

www.sedgwick.com

Program Book

Monoline

Streamline Your Personal Umbrella Insurance Processes with Monoline. Simplify quoting, binding, transfers, renewals, and payments effortlessly. Our intuitive online platform and competitive rates empower account executives to save time, boost profits, and deliver topnotch customer service.

www.monoline.com

Welcome Cocktail Hour

MarketScout, a division of Novatae Risk Group

MarketScout, a division of Novatae Risk Group is a national MGA and wholesale broker headquartered in Dallas, Texas with a commitment to providing exceptional technical and market expertise for insuring private clients. As a Lloyd's Coverholder and MGA, they administer an exclusive homeowners program for members of the CIPC. MarketScout, a division of Novatae Risk Group is an MGA for commercial and personal exposures including collectibles, animal mortality, workers compensation, energy, professional and many other exposures.

More information is available on the MarketScout Exchange at **www.marketscout.com**.





monoline



EXHIBITORS

Art Peritus

Art Peritus is an industry authority on appraisals, art crisis management and collection consulting. Our team of seasoned and accredited experts appraise passion assets across all collecting categories – from fine art, jewelry, and watches, to wine, furniture, collectibles, and cars. Serving the insurance community, attorneys, family offices, fiduciaries, advisors, and private clients since 2007, our trusted, long-standing relationships with art institutions, galleries and auction houses support our client's needs at every stage of their collecting journey.

Sharikay Sloboda | Sharikay@artperitus.com | 954.440.6526 | artperitus.com

Castle High Value Surveys

For over 20 years Castle has been regarded as the nation's leading provider of high value surveys. 8 of the top 10 High Net Worth writers trust Castle to knowledgeably and professionally represent their company and their brokers. We do not just gather data we have the technical expertise to identify a home's high-end features, and intelligently calculate an accurate and defensible replacement value. Castle consultants will suggest loss prevention measures where applicable and can always be trusted to treat your customers with the utmost respect and professionalism.

Clint Pope | cpope@castleis.com | 866.300.4198 exlservice.com/industries/insurance/survey-and-risk-control

Chubb

At Chubb, we assess, assume and manage risk with insight and discipline. Chubb is a world leader in insurance. With operations in 54 countries and territories, Chubb provides commercial and personal property and casualty insurance, personal accident and supplemental health insurance, reinsurance and life insurance to a diverse group of clients. As an underwriting company, we assess, assume and manage risk with insight and discipline. We service and pay our claims fairly and promptly. We combine the precision of craftsmanship with decades of experience to conceive, craft and deliver the very best insurance coverage and service to individuals and families, and businesses of all sizes. Chubb is also defined by its extensive product and service offerings, broad distribution capabilities, direct-to-consumer platform partnerships, exceptional financial strength and local operations globally. The company serves multinational corporations, mid-size companies and small businesses with property and casualty insurance and risk engineering services; affluent and high net worth individuals with substantial assets to protect; individuals purchasing life, personal accident, supplemental health, homeowners, automobile and specialty personal insurance coverage; companies and affinity groups providing or offering accident and health insurance programs and life insurance to their employees or members; and insurers managing exposures with reinsurance coverage. Chubb has more than \$225 billion in assets and reported \$57.5 billion of gross premiums written in 2023. Chubb's core operating insurance companies maintain financial strength ratings of AA from Standard & Poor's and A++ from AM Best. Chubb Limited, the parent company of Chubb, is listed on the New York Stock Exchange (NYSE: CB) and is a component of the S&P 500 index. Chubb maintains executive offices in Zurich, New York, London, Paris and other locations, and employs approximately 40,000 people worldwide.

Ellen Kroesen | ellen.kroesen@chubb.com | 908.572.2718 https://www.chubb.com/us-en/individuals-families.html





HIGH VALUE SURVEYS

an EXL company



Enterprise Holdings

Enterprise Mobility has been moving mobility forward for more than 65 years. Today, with a fleet of more than 2.3 million vehicles, Enterprise Mobility provides a full spectrum of mobility services, including Exotic Car Collection by Enterprise. Founded in 2006 as an extension of Enterprise Rent-A-Car to meet customer demand for luxury vehicle rentals, the Exotic Car Collection by Enterprise features one of the largest selections of premium, high-end rental vehicles from some of the world's top manufacturers. All Exotic Car Collection customers experience Enterprise's signature customer service, including delivery and collection of vehicles. With our impressive range of premium luxury and performance vehicles, customers experience a thrill that stays with them long after the rental return.

Matt Hamerling | Matthew.L.Hamerling@ehi.com | 314.512.5000 | enterpriseholdings.com

FloLogic

FloLogic is the premium smart leak detection and auto water shutoff system that protects homes of all sizes without interrupting normal usage. Only FloLogic can accurately catch leaks when they begin as small as a drip to shut them off before catastrophic damage can occur, featuring an app that allows notifications, oversight and control from multiple users. Each FloLogic comes standard with low temp auto shutoff, backup battery and features full operation without internet connectivity. FloLogic makes getting leak protection easy with a network of experienced installers and a renowned support team to assist your clients.

Ian Greene | ian@flologic.com | 877-356-5644 | <u>flologic.com</u>

Go Rentals

At Go Rentals, we go beyond high-quality vehicle rentals to provide an exceptional level of personalized service for each and every Guest. The only Official Elite Rental Car Company recognized by Forbes Travel Guide, we are focused on exceeding the needs of business and leisure travelers. We want your trip to be enjoyable, memorable, and above all, convenient. When accidents happen, turn to Go Rentals to keep your clients moving with maximum convenience and peace of mind. Our experienced Insurance Team is ready to respond the moment a client needs vehicle repairs, with professional, courteous, and prompt white-glove service.

Darius Venys | dariusv@gorentals.com | 312.778.6600 | gorentals.com

Leak Defense

Sentinel Hydrosolutions LLC provides white glove services to our customers through our individual Sales Account Managers. We manufacture the Leak Defense System which is designed to monitor water flow in the home/ building and minimize the catastrophic nature of damage if there's a leak. We specialize in both residential and commercial applications and provide technical support to all parties for our product.

e/ LEAKDEFENSE k. de A WATTS Brand







- Mueller@Home - allows policyholders to submit critical underwriting

Jon Gebhard | jon.gebhard@muellerreports.com | 716.264.5265 | muellerreports.com

MexiPass

and many other exposures.

MexiPass is a Managing General Agent (MGA) and Underwriting Manager for Mexico insurance products specifically designed to meet the needs of American Residents and Businesses. MexiPass has decades of experience guiding insurance agents and brokers on the key differences between the US and Mexico insurance markets and ensuring that their clients have Mexican insurance coverage they can trust.

Marketscout, a division of Novatae Risk Group

MarketScout, a division of Novatae Risk Group is a national MGA and wholesale

Risk Group is an MGA for commercial and personal exposures including collectibles, animal mortality, workers compensation, energy, professional

Chris Hatt | chatt@marketscout.com | 626.765.0330 | mexipass.com

Jorge E. Cacho-Sousa | jorge@mexipass.com | 626.765.0330 | mexipass.com

Modern Metric

Modern Metric, a cloud-based insurance growth platform, empowers insurance professionals and agencies to thrive in a digital world. Our flagship product, Discover, is a client onboarding and renewal application specifically designed for private client accounts. It has an array of features aimed at efficiently managing accounts, collaborating on information gathering, streamlining the quoting process, and building thoughtful proposals.

Chad DiPrince | chad@modernmetric.com | 970.315.2556 | modernmetric.com

Mueller Reports

With more than 40 years of experience in real estate reporting and risk assessment, we distinguish ourselves with a seamless blend of proprietary technology and professional staff to bring accurate and consistent reporting to the insurance industry. There's no denying that high net-worth policyholders have special requests and unique expectations when it comes to their surveys. We understand. That's why a select number of our all-employee field staff have earned specific eligibility to perform complete, consistent, and accurate High-Value surveys while respecting the needs of each policyholder as well as their property. In addition to on-site services, our user friendly application information without having to welcome a field representative inside their home. Through an enterprise partnership with CubiCasa, Mueller@Home leverages cutting edge technology to provide LiDar driven digital floorplan renderings of high value properties.

broker headquartered in Dallas, Texas with a commitment to providing exceptional technical and market expertise for insuring private clients. As a Lloyd's Coverholder and MGA, they administer an exclusive homeowners program for members of the CIPC. MarketScout, a division of Novatae



modernmetric







Neptune Flood

Neptune Flood is the preferred alternative to the NFIP. We offer an easy-touse, entirely digital process for residential, commercial, and RCBAP (condo) products. Go from quote to bind in less than two minutes and provide higher coverage limits and additional optional coverages to properly insure your customer. Neptune adds over 1,000 new policies each week and is closing in on 200,000 bank-compliant policies across 49 states and Washington, D.C. Agents across the country are choosing Neptune to protect their customers from the catastrophic risk of flooding.

Jean-Luc Eckstein | jean-luc@neptuneflood.com | 813.215.0455 | neptuneflood.com

Private Client Select

Private Client Select is an industry leading underwriter for high- and ultrahigh-net-worth individuals. We find solutions for their most complex assets and passions using our innovative products, cutting-edge risk services, and creative approach to underwriting with both admitted and non-admitted products.

Lauren Bailey | lauren.bailey@privateclientselect.com | privateclientselect.com

Prime

Prime Insurance Company is an A (Excellent) rated, excess and surplus lines carrier that provides solutions for specialty risks and has decades of experience in underwriting, risk management and claims expertise. Prime, using a partnership approach, provides solutions that traditional markets do not offer and specializes in specialty liability, commercial auto, professional liability, TRU Umbrella, TRU Homeowners, property and casualty insurance.

Lisa Rzewnicki | lisar@primeis.com | 312.884.5808 | primeis.com

The National Alliance

For years, most people didn't understand risk, insurance, or the policies themselves. Yet, back in 1969, a small group of Texas independent agents knew the truth: With a structured curriculum and practical, real-life education beyond theory, they could ignite an entire industry of skilled professionals. Together with University of Texas educators, these pioneering agents formed the industry's first nonprofit training and CE credit resource. The National Alliance was born. Along the way, we've built a genuine community of professionals who succeed and thrive. For decades, we've impacted millions of professionals with our practical education. Like us, they're dedicated to lifelong learning and collaboration. Our participants understand their career potential and gain a real workplace advantage. Today, our education and networks continue to evolve and expand. We are trusted to lead the risk management and insurance industry through change. The National Alliance ensures no one must go it alone. We've made success a group activity.





Private Client

SELECT







SPEAKERS



Ron Assise

Senior Vice President, Horton Personal Insurance

Ron Assise is Senior Vice President of Horton Personal Insurance. Ron's constant energy and pure passion for making sure customers are properly protected is what has driven Ron for almost 40 years in the insurance industry. Ron now works in partnership with George Daly, Horton's new President of Personal Insurance. Ron's tremendous depth of knowledge in insurance comes from his vast industry background. Beginning in the mid-1980s, Ron was an Agent and District Manager for Prudential Insurance in Chicago. Following Prudential, Ron was a District Manager for American Family Insurance for several years before founding his own agency, The Ronald Assise Insurance Group, located in Crestwood, Illinois. In 2005, when Ron made the decision to combine his agency's strengths with those of The Horton Group, he became President of Horton Personal Insurance. For several years, Ron was an Instructor for the Erie Insurance Agent College, teaching an Agency Management seminar to other agency leaders. Ron taught modules on staffing, from the recruiting process to interviews, profiling, orientation, training, and performance reviews. He also focused on marketing issues, including various marketing sources, setting a budget, tracking results and return on investment. Ron has also served as the National Program Chair at three consecutive personal lines meetings for the Assurex Global organization. Ron's interest in education continues, he has named "Director of Education" for the "Council for Insuring Private Clients" in March 2014. Ron is also on the faculty of the National Alliance for Insurance Education and is a Board Director for the "Council for Insurance Private Clients" (CIPC).



Jill Arnold Bull

President, Private Risk Solutions, Lockton Companies

The Private Risk Solutions Practice is licensed in all 50 states and has global capabilities to meet the needs and lifestyle of our clients. Jill is a founding member of Lockton's Private Risk Solutions Practice and currently serves as President of the national practice. She brings a tremendous passion to ensuring her clients receive a consultative approach to risk management and insurance. Jill joined Lockton in 2017 and has more than 22 years in the insurance industry. As a producer and member of the executive committee, she leads a team committed to our clients and driven to deliver extraordinary results. Jill partners with clients - as well as leading wealth management firms, attorneys, accountants, family offices and their advisors - to manage the insurance needs of successful individuals and families.



Rick Hiebert

Head of Partnerships, Wondeur AI

Rick is a certified appraiser with 20 years of experience servicing the high net worth space in the insurance industry, as well as aiding major institutions in Canada and the USA. In 2019, Rick joined Wondeur AI as Head of Partnerships, believing that AI is crucial in powering up the art ecosystem, spanning from insurance to wealth management and the creative community. Rick's expertise is not limited to appraisal alone; he brings a profound understanding of the evolving needs of highnet-worth clients across various age groups in both Europe and North America. His deep insights into the distinct preferences and requirements of these diverse client segments have been instrumental in tailoring services that resonate well with them, ensuring relevance and value. His knowledge spans a broad spectrum, from asset acquisition and valuation to legacy planning, donation strategy, loan lending and risk management, making him a valuable asset to Wondeur AI and its clientele of insurers and wealth management firms. At Wondeur AI, Rick joined a team of senior Al researchers from MIT and the University of Toronto. Wondeur Al is a Deeptech company which supports prominent global financial institutions in structuring data and analyzing risks associated with art asset values. Their services are vital in providing lending, estate planning, and insurance to value risk analysis for art assets worth \$1.4 trillion across two continents and eight countries. Rick has been an avid collector for the past 20 years and is deeply involved in diverse communities across North America.



William H. Van Den Heuvel

Senior Vice President, The Cincinnati Insurance Company

Will serves as senior vice president of The Cincinnati Insurance Company, one of the country's top 25 property casualty insurer groups based on net written premium. He is responsible for running Cincinnati's \$2.4 billion personal lines division, achieving its goals including driving Cincinnati's high net worth personal lines strategies. Will brings over 30 years of experience supporting independent agents in the personal lines marketplace. Prior to joining Cincinnati in 2014, Will was chief operating officer and Executive Vice President for AIG's U.S./Canada personal lines businesses including Private Client Group and Premier Client Solutions and Lexington personal insurance. Will also spent 13 years at Chubb Insurance where he held a variety of underwriting and marketing leadership roles. Will earned his bachelor's degree in finance from Boston College.



Sheri Jammé, CPRIA

Principal, Newfront

With over two decades of experience in advising some of the most prominent leaders in Silicon Valley and across the country on their personal insurance needs, Sheri brings a wealth of expertise to the high-net-worth insurance space. Currently serving as a Principal at Newfront, an innovative Insurtech company, Sheri has been driving forward advancements in insurance processes, leveraging cutting-edge technology to benefit clients and streamline internal operations. Since joining Newfront in its early stages in 2019, Newfront has expanded into a global brokerage with nearly 1,000 employees and offices across the US, boasting a valuation of \$2.3 billion. Backed by prestigious investors including Goldman Sachs and Founders Fund, Newfront continues to push boundaries in the insurance industry, developing Al-powered solutions to enhance both client experiences and employee efficiency. Sheri holds a Bachelor of Science degree in Business with a concentration in Finance & Economics from Notre Dame De Namur, where she graduated with honors. Additionally, she holds the Certified Private Risk Insurance Advisor (CPRIA) designation and serves as the Co-Chapter Chair of the PRAM Pacific Southwest Chapter. Sheri has addressed audiences on a wide range of topics, from emerging trends like NFTs and crypto to specialized insurance coverage areas such as Employment Practices and Directors & Officers liability. Her extensive experience working with Family Offices spans from managing insurance portfolios with complex organizational structures, large real estate portfolios, domestic staff, marine, aviation, extensive art collections and international exposures.



Vicki Kemp

Account Executive, Private Risk Solutions, Lockton Companies

As an Account Executive, Vicki delivers consultative risk management advice to family offices, successful individuals and their families, and their trusted advisors. She brings a wealth of risk management expertise and a passion for helping clients protect what matters most to them. Through a thoughtful and collaborative approach, Vicki works with an experienced team to identify and define exposures, assess personal risk, and implement holistic risk management programs using innovative insurance solutions and advisory services. All of this is done with each client's objectives and lifestyles in mind. Vicki has a track record of delivering extraordinary results for clients. Her solid relationships with industry partners help her identify comprehensive, cost-effective solutions that may not be available elsewhere. She works with a dedicated claims team who provides concierge-level advocacy and strives for the best possible outcomes for her clients.



Richard Kerr Chief Executive Officer, Novatae Risk Group

Richard Kerr is Chief Executive Officer of Novatae Risk Group. Novatae is a top ten intermediary operating in 43 locations. Novatae is a Lloyd's Coverholder, MGA, Program Manager and wholesale broker representing over 300 insurers. Mr. Kerr was previously the Founder and CEO of MarketScout. As of November 2022, all of MarketScout's underwriting and brokerage facilities are now a part of Novatae.



Dale Krupowicz Chief Operating Officer, Partner, Personal Risk Management Solutions

Dale has spent her entire 30 year career working on the personal insurance agency side of the insurance business. She has specialized in the high net worth arena, serving the personal insurance needs of successful individuals and families. Dale is responsible for all aspects of operations including client experience, insurance company relationships and talent management. Dale is often consulted by senior level insurance company executives on innovation and new customer creation. She works with several of the best insurance carriers to customize programs for clients all over the country, and internationally, including some of the largest art collectors in the world and industry moguls. Dale has a Bachelor's Degree from Mercy College and a Certified Advisor of Personal Insurance (CAPI) Designation from Wharton, which is an exclusive designation given to only an elite group of personal insurance professionals. Dale is considered an expert in the business and has been featured in Investment News, Rough Notes, ThinkAdvisor and Property & Casualty 360. She was named one of the Elite Women in Insurance by Insurance Business America in 2016. Dale is a member of the Private Risk Management Association.



Robert F. Larocca

Chief Strategic Relations Officer, SterlingRisk

Robert F. Larocca joined SterlingRisk in 1999 and brings more than 30 years of professional experience on both the carrier and brokerage side of the insurance industry. Founded in 1932, SterlingRisk is part of a nationally ranked top 15 insurance brokerages in the U.S., boasting over 220 highly skilled insurance specialists. SterlingRisk has experienced double-digit growth consistently during the last five years. Since joining the firm, Robert has helped to successfully transform SterlingRisk into one of the top Brokerages in the United States. He has been instrumental in various aspects of the business process, resulting in long-standing relationships throughout the insurance community. His responsibilities extend to Strategic Insurance Carrier Relations, Client Management, New Business Development, Strategic Planning and Executive Management. Robert's influence on the Private Client Industry Practice has enabled SterlingRisk to excel in this space and to offer value added insurance products and services to these highly specialized clients. Prior to joining SterlingRisk, Robert held the position of Branch Manager of Long Island for American International Group (AIG). He began his career as a broker with Marsh & McLennan's FINPRO Division in New York. Robert is a tireless supporter of many local and national charitable organizations. He is a current member of The Nassau County Police Reserves. He is on the board of RiskProNet, an International network of U.S. based Insurance Brokers as well as the Council for Insuring Private Clients (CIPC). Robert also serves on the board of directors for The Mental Health Association of Nassau County, The Theodore Roosevelt Council of the Boy Scouts of America and Nassau County Law Enforcement Exploring.



LoriAnn V. Lowery-Biggers

Chief Executive Officer, Triumph Capital Holdings

LoriAnn is CEO of Triumph Capital Holdings, a diversified financial and management services holding company. She is a partner and co-founder of BellaVaughan, Inc., an award winning global diamond, design and manufacturing company with collections exclusively distributed worldwide through BlueNile, Inc., a Signet Company (NYSE SIG). LoriAnn has over 25 years of experience in the global finance and insurance industry, notably as President of Lloyd's of London for North America. In executive roles at The Navigators Group, Inc (Nasdaq: NAVG) where she served in various capacities as President of Navigators Commercial Insurance Company, President of Field Operations and CMO. She has previously held positions as the Managing Director and National Practice Leader for Risk Management and Financial Products for Wells Fargo, Inc. and served as Vice-Chairman of Wells Fargo Management, and as the Managing Director and Practice Leader for Enterprise Risk Management, Alternative Risk Finance, Financial Products and Advanced Risk Solutions at Marsh and McLennan, Inc and Guy Carpenter. LoriAnn serves as a non-executive director on the boards of CompRe Insurance Group Holdings Limited; The BMS Investment Holding Company and is Chair of the BMS Governance and Enterprise Risk Committee and the DE&I Committee. She is a director on the corporate board and Chairperson of the Finance & Investment and the Nominating & Governance Committees of Copper Point Mutual Insurance Holding Company. She is Lead Independent Director of Brown & Riding Insurance, Inc.

Kate Norris, CPRM, CPRIA, CAPI



Founder and Chief Executive Officer, Atténuer Risk

Kate Norris is a recognized industry expert, having served hundreds of family offices and wealth advisory firms over her 25+ year career. She is unique in that she has worked on the broker, carrier, wealth advisory and consultancy sides of the house. She utilizes her unique experience to serve family offices, wealth advisory firms and families of exceptional wealth as a fee-only risk and resiliency consultant. Kate is a frequent speaker at family office conferences and forums having conducted over 100+ educational sessions. She has authored numerous white papers focusing on carrier selection, multifamily office services, cybersecurity, employment liability and generational risks. Most recently, Kate was the Vice President and Family Office Practice Leader at Chubb. Prior to the Chubb acquisition she worked as the worked as the AVP, for Strategic Business Development – Family Office with ACE Private Risk Services and was the national family office practice leader at Fireman's Fund Personal Insurance and held leadership roles at Hub International Insurance Brokers, Insurance Design Center, LLC, Family Office Exchange, LLC (FOX), and Bernstein Investment Research and Management. Kate maintains her insurance licensing and holds a bachelor's degree in liberal arts and sciences from the University of Kansas. Kate serves on the Advisory Board of the Council for Insuring Private Clients & High Net-worth Individuals, Kate is also a faculty member for the National Alliance-CPRM designation.



Jeff Owens

Associate Manager, Cincinnati Insurance Company

Jeff currently oversees personal lines employee engagement, culture enhancement, and training and development for Cincinnati Insurance. His passion is coaching and developing Cincinnati's personal lines associates, so they can best serve our agents and their clients. Jeff holds a bachelor's degree in secondary education from University of Illinois and is a licensed trainer with Dale Carnegie Training.



Lei Redding Founder, Redding Private Client

After working with local independent insurance agencies as well as a national broker, Lei Redding started her own boutique property & casualty firm specializing in private client insurance. Lei formed Redding Private Client with the belief that affluent families want insurance to be simplified, and that they appreciate professional advice focused on their unique lifestyle. Lei and her team work with clients around the country using a solutionoriented approach focusing on risk management and asset protection. Lei is a former business owner, a member of the Independent Insurance Agents of Georgia and past president of the Metro Alliance of Independent Insurance Agents.



Nick Ross, CAPI

Senior Vice President, Member of Acrisure Private Risk Advisors

Nick Ross is a seasoned professional in the private client property and casualty space. currently working as part of Acrisure Private Risk Advisors in their New York City office. With over fourteen years of experience in the field, he has worked at both regional and national brokerage firms, starting as a junior level account manager and progressing to become a practice leader and a nationally recognized producer at Acrisure. Throughout his career. Mr. Ross has built strong relationships with carriers such as AIG, Berkley One, Chubb, Cincinnati, and PURE, which demonstrates his expertise and credibility in the industry. As a specialist in private client risk management, he brings a wealth of experience in catering to the unique needs of ultra-high net worth (UHNW) and Family Office clients. His extensive network with top insurance carriers is a valuable asset that he leverages to benefit the entire Acrisure family. providing unparalleled support to single-family offices (SFOs), multi-family offices (MFOs), trusts and estates attorneys (T&E attorneys), CPAs, business managers, and, most importantly, his clients. Mr. Ross actively participates in national councils and boards, including Acrisure Private Risk Advisors, and is dedicated to elevating Acrisure to the gold standard of private risk. Additionally, he currently serves as a member of the Cincinnati Insurance Company National Agency Council and has been a guest instructor at the Cincinnati Personal Lines HNW Producer School since 2018. In 2019, he completed his Capstone Project on the relationship between the multi-family office and the property & casualty advisor as a Wharton CAPI alumni.

Celia Santana



President & Chief Executive Officer, Personal Risk Management Solutions

Celia and her team represent successful individuals and families, working hand in hand with their clients' wealth advisors and family offices, to help them identify, understand and manage the risks they face and the available options to address them. Celia's team is well known for advocating on behalf of their clients for the best possible outcomes. Celia began her career in the high net worth property and casualty space over 30 years ago at Chubb Insurance. where she discovered her passion for the business. In her last job at Chubb Insurance she was a senior executive with a significant P&L responsibility. Celia is passionate about recruiting and developing talent into the insurance industry, evidenced by her mentorship and sponsorship of many people in the business, including women and POC. Celia was named an Elite Woman in Insurance in 2021 and 2022. She is on the Board of the Private Risk Management Association, the preeminent organization in the HNW space. Celia was named one of the Top 50 Women in Private Wealth by Private Asset Management Magazine in 2015. Celia has been a featured speaker at Working Mother Media's Annual Conference, the Private Risk Management Association and the National Association of Insurance Women. She has also been featured in the Wall Street Journal, Rough Notes, AOL's Daily Finance column, Investment News, Independent Agent Magazine, American Agent & Broker Magazine, Careerbuilder.com and various other media outlets. Celia is a graduate of Wesleyan University. She volunteers her time with A Better Chance and the National Hispanic Scholarship Fund.



Paul Schriefer, J.D., CPCU, CLU, ChFC, CIC

Associate Lecturer, Florida State University

Paul Schriefer is an Associate Lecturer in the Dr. William T. Hold/The National Alliance Program in Risk Management and Insurance at Florida State University. Additionally, he is the program's director for continuing insurance education. Paul received his J.D. for the University of Georgia, M.A. from Miami University (Ohio) and his B.A. from the University of Michigan. Additionally, Professor Schriefer has earned several insurance industry professional designations including the CPCU, CLU, ChFC and CIC. Professor Schriefer teaches a variety of courses in risk management and insurance at both the undergraduate and graduate levels including a newly created course, Insurance and International Markets. This new course serves as the conduit to provide FSU RMI majors with the opportunity to study the Bermuda, London, and Munich insurance markets in person. Prior to joining the faculty at Florida State University, Paul enjoyed a 25-year career in the insurance industry in a variety of roles including property and casualty claims management and as an insurance defense attorney.



Andrew Siffert

Senior Vice President &/ Senior Meteorologist, BMS Re Catastrophe Analytics

Andrew Siffert is Senior Vice President and Senior Meteorologist within BMS Re US Catastrophe Analytics and is the Peril Advisory Team lead. He has been at BMS for 11 years. He works closely with clients to help them manage their weather-related risks by adding value through catastrophe response, catastrophe modeling, product development, parametric insurance products, and scientific research and education. He has 21 years of industry experience, having worked in the energy and insurance industry, focusing his meteorological knowledge on helping companies manage their weather risks. Before joining BMS, Andrew worked for FlagstoneRe as a CAT Project Manager / Meteorologist and was responsible for developing LiveCAT products, frontline research, and analytics used in the underwriting process. He has also worked at ACE Group with the development of ACE Global Weather Insurance products and helped pioneer the weather derivatives market and energy trading markets while



David Stamatis

Business Development Manager, Descartes Underwriting

As an expert in Parametric Property Insurance, David crafts tailored solutions that provide rapid and transparent payouts based on predetermined triggers, such as weather events or other measurable parameters. With 13 years of experience broking and underwriting CAT Property, David brings a wealth of knowledge and expertise to the table. Whether educating the market on Parametric, advising clients on risk mitigation strategies or collaborating with industry partners to develop innovative insurance products, David is committed to driving positive outcomes.



Jacqueline Stephens

Senior Director Agency Centre, Acrisure

Jacquie is the Senior Director of the Acrisure Agency Centre in Toronto. Jacquie joined Acrisure in 2020 and has never looked back. She oversees Personal Lines, Commercial Lines, Claims as well as the daily operations of the center. Jacquie has been in the Insurance Industry for over 25 years. She has extensive insurance knowledge of operational processes and procedures, budgeting, finance and training. She has held various positions over the years : Insurance Broker, Trainer, Recruiter, Claims Manager, Manager of Customer Experience, Operations Manager, District Manager and Brokerage Director. Jacquie's skills and expertise are around people management. She has a passion for recruiting and training. She is motivated by ensuring that staff reach their potential and grow within their careers. In her current role, she oversees the professional development of 50 staff and growing. Jacquie has been described as a "people" person due to her ongoing passion to recognize staff and elevate them to be the best they can be. Coaching and training are key elements in her daily interactions. Jacquie resides in Toronto, Canada. She graduated university with a major in Economics and minor in Business Administration. She has her FCIP – Fellowship Chartered Insurance Professional Designation as well of CIOP – Chartered Insurance Operations Professional. She obtained her Professional Trainer Certification through Langevin and became a certified instructor and facilitator.



Scott Teller

Executive Underwriting Officer, Chubb Personal Risk Services

Scott Teller is the Executive Underwriting Officer for Chubb Personal Risk Services. He is responsible for the high-net-worth client segments which includes providing underwriting, account management support, marketing, and technical expertise for PRS's largest clients. In addition, Scott is responsible for the management oversight for the Fine Art and Jewelry Underwriting Specialists, as well as the Custom Solutions Practice (Manuscript and Excess & Surplus Lines solutions). Scott's deep underwriting experience and knowledge of the reinsurance marketplace allows him to create solutions for our high-net-worth clients' complex needs. Scott has 38 years of experience in underwriting and marketing for Chubb Personal Insurance, including prior experience as an Appraiser, Underwriter, Personal Lines Manager and Personal Lines Regional Manager.



Kurt Thoennessen

Chief Executive Officer, RiskRevu

Kurt Thoennessen is the founder and CEO of RiskRevu, which offers insurance agents an innovative digital platform that streamlines the data collection process for new business, updating risk information, and various service functions. The RiskRevu platform was born out of Kurt's experience as a high net worth insurance advisor and Vice President of an insurance agency for over 16 years. Kurt is the host of the Private Client Risk and Resilience podcast and has authored several articles for International Risk Management Institute's personal risk management column. He is a founding member of the Private Risk Management Association and is president of the NYC Chapter of the PRMA. In 2008, he founded the High Net Worth Property and Casualty Insurance Advisors group on LinkedIn, which now has over 1,300 members. Kurt has been quoted in or written/filmed content for national periodicals including Daily Fintech, Insurance Nerds, InsureTech Hartford, Risk & Insurance, MarketWatch, CNN Money, Best's Review, Money magazine, and Car Collector magazine on insurance topics related to high-value homes, automobiles, and personal liability. He has also written several articles on various insurance topics for Worth magazine. He was awarded the Digital Innovator award by Liberty Mutual and Safeco Insurance Company in 2024 for his involvement in their Agent for the Future series. He was also named one of Risk & Insurance Magazine's Power Brokers for 2016 in the Private Client category and was awarded the JoAnn Heltibridle Award for Professional Excellence in 2015 by the Private Risk Management Association at its annual summit. Kurt has a degree in management and business from Boston University and earned the Certified Advisor of Personal Insurance (CAPI) designation from Wharton's Aresty School of Executive Education.



Phil Trem President - Financial Advisory, MarshBerry

As President of MarshBerry's Financial Advisory Division, Phil brings extensive knowledge in merger & acquisition (M&A) advisory and operations, specifically in the business and technology arenas and is a trusted partner for buyers and sellers who depend on his proficiency at deal negotiation, due diligence, deal execution and integration planning. His experience encompasses the full life cycle of an M&A transaction for independently-owned insurance agents & brokers, specialty distributors, wealth management advisors, retirement planning specialists, private equity firms, banks & credit unions and insurance carriers. Phil's objective is to provide clients with a seamless, comprehensive experience. In addition to Phil's M&A responsibilities, he also contributes to MarshBerry's consulting practice by helping guide clients in the areas of strategic planning, internal perpetuation planning, agency valuation, financial and organizational development and compensation strategies. He brings practical tools to clients in their effort to plan and implement strategies to increase their success and profitability. As a facilitator for MarshBerry's executive peer exchange network, Connect, Phil promotes sharing best practices - he believes we grow stronger together. Phil is a member of MarshBerry's Board of Directors, having previously served as an Executive Vice President within the M&A team before becoming President of the Financial Advisory division. He was named Insurance Business America 's Hot 100 list in 2017, and his leadership positions him as a sought-after keynote speaker at agent association meetings, carrier elite meetings and executive leadership forums. Education and development are important values to Phil, and he shares his knowledge of industry trends and strategies as a contributing writer to Leader's Edge, a magazine for commercial property-casualty brokers and group benefits consultants. He is also a referenced industry authority for publications such as Rough Notes ,Business Insurance , Employee Benefit Adviser , Insurance Business America , and S &P Global Market Intelligence . Phil currently maintains the FINRA Securities Industry Essentials (SIE®) Exam, in addition to the Series 62, 79 and 63 FINRA Registrations through MarshBerry Capital, LLC, the affiliated FINRA-registered Broker/Dealer of Marsh, Berry & Co., LLC. Phil has a bachelor's degree in finance and management information systems from Ohio University, and a law degree from the Cleveland-Marshall.



For over 20 years Castle has been regarded as the nation's leading provider of high value surveys. 8 of the top 10 High Net Worth writers trust Castle to represent their company and their brokers knowledgeably and professionally. We do not just gather data; we have the technical expertise to identify a home's high-end features, and intelligently calculate an accurate and defensible replacement value. Castle consultants will suggest loss prevention measures where applicable and can always be trusted to treat your customers with the utmost respect and professionalism.

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PROGRAM BENEFITS:

- A professional edge and insight into this unique and growing market
- The opportunity to exchange ideas and practices specific to this client community with top industry experts
- Access to innovations and skills that cover risk management, technical information, and account development
- A renowned program developed in collaboration with the Council for Insuring Private Clients (CIPC)

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MarketScout's Private Client Solutions

We offer the flexibility, capacity and expertise to customize products and services to meet the unique needs of affluent individuals.



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- Collectibles: jewelry, fine art, wine, etc.
- Yachts
- Aviation
- Builder's Risk, COC, Renovations
- Kidnap, Ransom & Extortion
- Personal Excess Liability
- Domestic Work Comp
- Employment Practices Liability
- Excess Flood
- Dwelling Coverage for Brush
- Unprotected Risks
- Earthquake
- Multi-State & International
- Admitted & Non-Admitted Markets
- Animal Mortality
- Coastal and CAT Exposures
- Ownerships: LLC & Trust
- Risks with Loss History
- Short-Term & Annual Rentals



Market Highlights

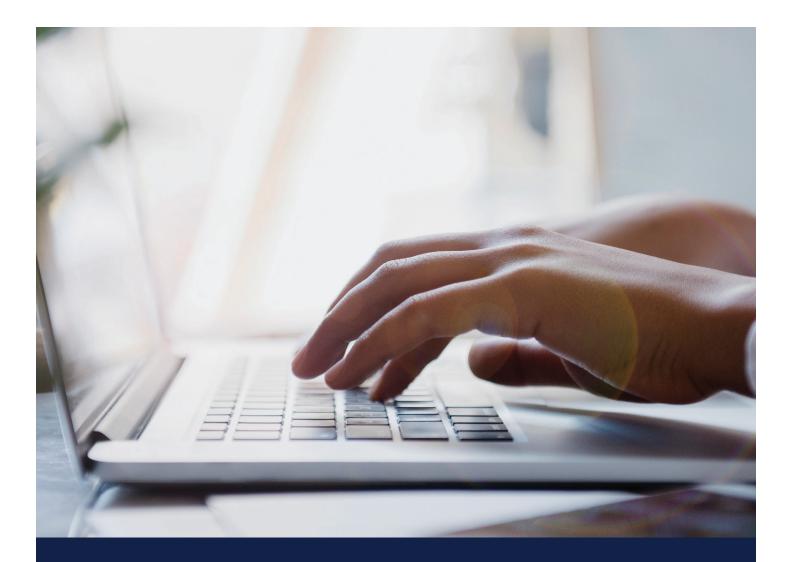
- "A" rated insurers
- Exclusive Binding FacilitiesSuperior Products, Capacity,
- Flexibility and PricingSupport, Expertise and Market
- Leverage from Top High-Net-Worth MGA
- Worldwide Coverage
- No Minimum Production Requirements



Submission Requirements

- ACORD Forms for Each Line of Business
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- Helpful When Available — Jewelry and Fine Art Schedules
 - Current Declarations
 Pages
 - Wind Mitigation Forms, Flood Declarations, and Elevation Certificates
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Ben Phillips Co-Founder & CEO



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