



QUINLEY RISK ASSOCIATES, LLC

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Education

B.A., Politics, Wake Forest University
M.A., Government, College of William & Mary

Professional Experience

12/11 – Present	Principal, Quinley Risk Associates LLC, Chesterfield, VA
5/09 – 11/11	Vice President, Risk Management Resources, Berkley Life Sciences LLC, Ewing, NJ and Woodbridge, VA
5/08 – 5/09	Vice President, Advisory Board, Council on Litigation Management, Fairfax, VA
2/96 – 5/08	Senior Vice President, Hamilton Resources Corporation and Medmarc Insurance Group, Chantilly, VA
10/89-1/1/96	Vice President - Risk Services, Hamilton Resources Corporation and MEDMARC Insurance Company, Fairfax, VA
6/86-9/89	Claim Manager, Hamilton Resources Corporation, Fairfax, VA
2/81-5/86	Claim Supervisor, Crawford & Company, Fairfax, VA
8/77-1/81	Claim Adjuster, Crawford & Company, Norfolk, VA

Professional Designations

Chartered Property & Casualty Underwriter (CPCU)	1985
Associate in Claims (AIC)	1986
Associate in Risk Management (ARM)	1987
Continuing Professional Development (CPD)	1985-Present
Associate in Management (AIM)	1991
Associate in Reinsurance (ARe)	1998
Registered Professional Adjuster (RPA)	2013
Licensed Property & Casualty Insurance Consultant - Virginia	2014-2016



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Professional Memberships

Society of Chartered Property & Casualty Underwriters (CPCU)
Richmond, VA Chapter of the Society of CPCU
Claims and Litigation Management Alliance (CLM)
American Association of Insurance Management Consultants (AAIMCo)
Society of Registered Professional Adjusters (RPA)

Continuing Education Courses & Training Programs Attended

Crawford & Company Basic Casualty Adjusting School
Crawford & Company Advanced Adjuster Course
Crawford & Company Bonding Claims Course
Crawford & Company Maritime Injury & Death Course
Crawford & Company Products Liability Course
Crawford & Company Environmental Pollution Course
Crawford & Company Advanced Products Liability Course
Crawford & Company Professional Liability Course
Crawford & Company Management Course
Crawford & Company Motor Truck Cargo Course
Crawford & Company Settlement Techniques Course
Crawford & Company Workers Compensation Course
Crawford & Company Advanced Workers Compensation Course
Medical Terminology - Pictorial Course
Stancil's Detective School, Virginia Beach, VA, 1978
Fire & Arson Investigation School, City of Norfolk
“Good Faith Claim Handling” Course 225 - American Educational Institute

Awards & Honors

Society of CPCU Jay Gleason Award for Excellence in Public Relations, 1987 and 1988
Harry J. Loman Foundation Research Grant Recipient, 1990
Society of CPCU President's Award on behalf of D.C. CPCU Chapter, 1992
CPCU National “Standard Setter”, 1996



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Committee & Board Memberships

Chapter Public Relations Director, D.C. Society of CPCU, 1986-1988
Capital "I" Day Committee, Washington DC, 1987-1989
Director, D.C. Society of CPCU, 1988-1989
Secretary, D.C. Society of CPCU, 1989-1990
Vice President, D.C. Chapter of CPCU, 1990-1991
President-Elect, D.C. Chapter CPCU, 1991-1992
President - Washington D.C. CPCU Chapter, 1992-1993
Director, Potomac Chapter of RIMS, 1990-1991
American Law Firm Association Client Advisory Council, 1992
Vice President - International Litigation Management Association, 2002-2005
Member Client Advisory Board – National Association of Litigation Managers, 2005
Advisory Board - CPCU CLEW Interest Group, 2009-2010
CPCU Society Board of Ethical Inquiry, 2008-2013
Advisory Board - CPCU CLEW Interest Group, 2012-2016
CLM Bad Faith Committee, 2010-Present
CLM Products Liability Committee, 2009-Present
CLM Coverage Committee, 2013-Present
CPCU Publications Committee, 2016-2019
American Association of Insurance Management Consultants, Second Vice President, 2017-2019
American Association of Insurance Management Consultants, President, 2021-Present

Editorial Affiliations

Associate Editor, The Claimsman magazine, 1981-1989
Contributing Editor, Claims magazine, 1989-Present
Editorial Advisory Board, Medical Device & Diagnostic Industry magazine, 1989-1994
Contributing Editor, Medical Device & Diagnostic Industry magazine, 1991-1993
Editorial Advisory Board, Medical Product Outsourcing
Editorial Advisory Board, Medical Malpractice and Law Newsletter



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Books Published

Time Management for Claim Professionals (National Underwriter Company)
The Quality Plan (National Underwriter Company)
Claims Management (LRP Publications)
Successful Negotiating Insurance Claims (Marshall & Swift)
Litigation Management (International Risk Management Institute)
Managing Product Liability and Avoiding Litigation (LRP Publications)
Bulletproofing Your Medical Practice: Risk Management Strategies that Work (SEAK, Inc.)
Adjusting Adversity: How Claim Professionals Handle Worst-Case Scenarios
(National Underwriter Company)
Business at Risk: Managing the Terrorist Threat - co-authored with Don Schmidt
(National Underwriter Company)
Well-Adjusted: 185 Success Tips for the Adjuster's Career (National Underwriter Company)
Claim Handling Principles and Practices - Contributing Author
(Insurance Institute of America), 2006
Industrial Low Back Pain - Contributing Author (The Michie Company), 1984

Contributing Author to Insurance & Risk Management Textbooks Published by the Insurance Institute of America

Risk Assessment (ARM 54 textbook), 2005
The Legal Environment of Insurance (CPCU textbook), 2005
Risk Control (ARM 55 textbook), 2005
The Claims Environment (Second Edition – AIC textbook), 2000
Principles of Workers Compensation Claims (Second Edition), 1998
Principles of Workers Compensation Claims (AIC textbook), 1992
Enterprise-Wide Risk Management: Developing and Implementing (ERM Textbook), 2009
Claims Handling Principles and Practices course (AIC 30),
Video content contributed to the 2019 on-line version



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Articles Published

1. Spring 1980, "Law Dictionary--A Review," **The Claimsman**.
2. Summer 1980, " 'Adjusting' the Truth," **The Claimsman**.
3. Fall 1980, "The Time Trap: How to Get More Done in Less Time," (Book review), **The Claimsman**.
4. Fall 1981, "You Can Negotiate Anything," (Book review), **The Claimsman**.
5. December 1981, "As the Word Turns," **The Crawford Standard**.
6. Spring 1982, "How to Supervise People," (Book review), **The Claimsman**.
7. Spring 1982, "The Invisible Bankers," (Book review), **The Claimsman**.
8. Winter 1982, "Product Liability: Who Needs It?," **The Claimsman**.
9. Fall 1982, "Coping With Chronic Pain," **The Claimsman**.
10. 1982, Co-authored **Professional Salesmanship Course**. Crawford & Company, Atlanta, GA.
11. Spring 1983, "Theory Z and the One-Minute Manager," (Book reviews), **The Claimsman**.
12. Summer 1983, "Getting to Yes: Negotiating Agreement," (Book review), **The Claimsman**.
13. Fall 1983, "Pain Control: The Bethesda Program," (Book review), **The Claimsman**.
14. Winter 1983, "Translating Medico-Babble," **The Claimsman**.
15. Spring 1984, "Fearless New Year's Forecasts," **The Claimsman**.
16. Fall 1984, "The Eleven Commandments of Bad Faith," **The Claimsman**.
17. Spring 1985, "Working with Rehab, or 'Oh, My Achin' (back) Claim!'" **The Claimsman**.
18. 1985, "Managing Back Injury Claims: The Adjuster's Perspective." **Industrial Low Back Pain**. The Michie Company.
19. Summer 1985, "Of MBO's, MBA's and MBWA," **The Claimsman**.
20. Fall 1985, "Agents' Legal Responsibility," (Book review), **The Claimsman**.
21. Spring 1986, "A. H. Robins' Story: No Shield from Liability," **The Claimsman**.
22. Summer 1986, "Sue Thy Shrink: Freudian Slip and Fall?" **The Claimsman**.
23. Fall 1986, "Settling for Less," **The Claimsman**.
24. October 1986, "Three for Fall Reading," **Insurance Adjuster**.
25. April 1987, "The Adjuster's Bookshelf: Managing Lawyers, Procter & Gamble and Structured Settlements," **Insurance Adjuster**.
26. Spring 1987, "Procter's Gamble--and Loss," **The Claimsman**.
27. June 1987, "Medical Device Claims: Managing Your Insurer," **Medical Device & Diagnostic Industry**.
28. June 1987, "Medical Technology Losses," **CPCU Journal**.
29. July 1987, "The Adjuster's Bookshelf: The Upset Book," **Insurance Adjuster**.
30. September 1987, "The Adjuster's Bookshelf: Insurance, Excess and Reinsurance Coverage Disputes," **Insurance Adjuster**.



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31. Fall 1987, "Ready For a Good Claims Horror Story?" **The Claimsman**.
32. December 1987, "The Blame Game: A Solution," **Claims Magazine**, pp. 20, 30-31.
33. Winter 1988, "UVA Law Prof Seeks to End 'Shin-Kicking' Litigation," **The Claimsman**.
34. January 1988, "Today's Adjuster Better than Ever," **Claims Magazine**, pp. 38-40.
35. February 1988, "Excess Liability 'Fine Reference'," **Claims Magazine**, pp. 31-32.
36. March 1988, "Lawyers and 'The Terrible Truths'," **Claims Magazine**, pp. 24, 26-27.
37. April 1988, "Aggressive Good Faith: Odd Phrase, Good Advice," **Claims Magazine**, pp. 110-112.
38. Spring 1988, "Lawyers and 'The Terrible Truths'," **The Claimsman**.
39. April 1988, "Full Coverage: The Meaning and the Myth," **Risk Management**, pp. 38-42.
40. June 1988, "'Intro to Claims': Newcomer's Friend; Reviewer's Nemesis," **Claims Magazine**, pp. 57-58.
41. Summer 1988, "'Intro to Claims': Reviewer's Nemesis; Newcomer's Friend," **The Claimsman**, pp. 45-46.
42. August 1988, "Claims Detective: I Spy -- You Pay," **Claims Magazine**, pp. 69-71.
43. September 1988, "Casualty Checklists: Great Filling, Less Taste," **Claims Magazine**, pp. 37-38.
44. November 1988, "Cleaning Up The Liability Mess," **Claims Magazine**, pp. 42-43.
45. December 1988, "'Finder's' Rated As a Keeper," **Claims Magazine**, pp. 70-71.
46. **Time Management for Claim Adjusters**, Roberts Publishing Company, New York, NY, 1989.
47. January 1989, "What to Expect from Your Liability Defense Lawyer," **Medical Device & Diagnostic Industry**, pp. 105-128.
48. Winter 1989, "Ten Steps for Curbing Legal Fees," **MEDMARC Loss Prevention Newsletter**, pp.2-3.
49. January 1989, "Quintuplets From the Practising Law Institute," **Claims Magazine**, pp. 43-44.
50. January 23, 1989, "Attorney Helps Employers Manage Their Legal Fees," **Business Insurance**, p. 24.
51. February 1989, "Top Litigators Share Winning Secrets," **Claims Magazine**, pp. 38-41.
52. March 1989, "Attorney Reveals Cost-Cutting Secrets," **Claims Magazine**, pp. 40-41.
53. April 3, 1989, "Self-Insurance Book a Real Asset," **Business Insurance**, pp. 28-29.
54. Spring 1989, "Recent Wins Boost MEDMARC's Trial Scorecard," **MEDMARC Loss Prevention Newsletter**, pp. 2-3.
55. Spring 1989, "Claims Adjusting: A Hazardous Profession?" **The Claimsman**, pp. 20-21.
56. Spring 1989, "New Claims Book Targets Property Insurance Fraud," **The Claimsman**, p. 19.



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57. April 1989, "Guide to Evaluating Patients Tests Adjuster's Patience," **Claims Magazine**, p. 73.
58. April 1989, "Medical Device Lawsuits Proliferate as Use Grows," **Medical Malpractice Law & Strategy**, Volume VI, Number 6, p. 1,6-7.
59. June 1989, "Risk Managers and Defense Lawyers," **Risk Management**.
60. July 31, 1989, "An Affordable Gold Mine for Newcomers," **Business Insurance**, p. 27.
61. July 1989, "Personal Property Insurance Fraud: What the Legends are Reading," **Claims Magazine**, pp. 70-74.
62. August 1989, "Guide for Plaintiff's Bar Helps Adjusters Too," **Claims Magazine**, pp. 60-62.
63. September 1989, Book Review, "Introduction to Claims," **CPCU Journal**, pp. 134-135.
64. Fall 1989, "Please Hold . . . For Phone Power," **The Claimsman**, p. 43.
65. October 1989, "D&O Insurance: Board Games for Device Companies," **Medical Device & Diagnostic Industry**, pp. 64-70.
66. October 1989, "Protect Hospital from Medical Equipment Liability," **Hospital Risk Management**, pp. 132-134.
67. Fall 1989, "What's Your Litigation Management IQ?" **CPCU Claims Quarterly**, Vol. 7, No. 3, p. 2.
68. October 1989, "Selecting an Adjusting Service: Pickin' and Grinnin'," **Claims Magazine**, pp. 65-66.
69. November 20, 1989, "Risk Managers Chained to the Phone? Tips to Maximize Time Spent on the Line," **Business Insurance**, p. 58.
70. November 1989, "Picking an Adjusting Company: Good Questions Get Right Answers," **Claims Magazine**, pp. 56-58.
71. Winter 1989, "How to Improve Settlements with Claims Adjusters," **Insurance Settlements Journal**, pp. 62-64.
72. December 1989, "Trying an Adjusting Service on for Size," **Claims Magazine**, pp. 56-58.
73. January 1990, "The Three C's: Clients, Conflicts and Costs," **Claims Magazine**, pp. 54-55.
74. January 1990, "Twelve Tips for Defending Yourself in a Malpractice Suit," **American Journal of Nursing**, pp. 37-40.
75. January 22, 1990, "Asking the Right Questions Takes Skill," **Business Insurance**, p. 20.
76. February 1990, "Product Liability Defense: A Claim Manager's Perspective on the `Uneasy Triumvirate,'" **Defense Research Institute Coursebook on Product Liability**, pp. O-1 through O-13.
77. March 1990, "Alertness in Picking Adjusters Gives Risk Managers a Good Night's Sleep," **Claims Magazine**, pp. 58, 73-74.



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78. March 1990, "Keeping Clergy Counseling Suits from Tearing at the Cloth," **Risk Management**, pp. 32-36.
79. Spring 1990, "What Do Claims Managers Expect from their Defense Attorneys?" **Insurance Settlements Journal**, Vol. 1 No. 2, pp. 48-51.
80. Spring 1990, "Are I.M.E.'s D.O.A.?" **CPCU Claims Section Quarterly**, Volume 8, Number 1, pp. 1-2, 4.
81. April 1990, "Medical Device Claims: The Insurance Carrier's Perspective," Coursebook for **Defense Research Institute Drug & Device Litigation Seminar**.
82. April 1990, "Risk Managers: Corporate Rodney Dangerfields?" **Claims Magazine**, pp. 115-119.
83. May 1990, "Chemistry + Good Numbers = Wise Adjusting Choice," **Claims Magazine**, pp. 34, 75-76.
84. May 28, 1990, "Risks of Mergers/Acquisitions Detailed on Tape," **Business Insurance**, p. 40.
85. June 1990, "Pricing Considerations: Flat Fees or Fat Fees?," **Claims Magazine**, pp. 38-39, 86.
86. June 1990, "The Pollution Exclusion and Legionnaires' Disease," (co-author), **CPCU Journal**, pp. 84-91.
87. Summer 1990, "Insureds, Insurers and Defense Attorneys: The Uneasy Triumvirate," **Insurance Settlements Journal**, pp. 50-53.
88. June 1990, "Is Sexual Abuse or Molestation Covered Under CGL?" **Rough Notes**.
89. August 1990, "Counseling Malpractice: Keeping Suits from Tearing at the Cloth," **Church Administration**, pp. 22-23.
90. July 1990, "Risk, Insurance Managers Offer Ways to Save on Legal Costs," **Claims Magazine**, pp. 67-71.
91. August 1990, **Claims Magazine**, "Claims Handling for Self-Insureds: Make Your Own, or Buy?" pp. 44-45.
92. September 1990, **Claims Magazine**, "Another Look at Time and Expense," pp. 32-33.
93. September 24, 1990, **Business Insurance**, "How to Beat Insurers in the Claims Game," p. 42.
94. Fall 1990, **The Claimsman**, "Adjusting Costs: Let's Make a Deal!" pp. 24-25.
95. Fall 1990, **Insurance Settlements Journal**, "Goodbye Wheel-Spinning: Rx for Efficient Negotiating," pp. 52-54.
96. October 1990, **Medical Device & Diagnostic Industry**, "Medical Product Liability: Lessons from the Claims File," pp. 56-59.
97. October 1990, **Claims Magazine**, "Public Adjuster: A Risk Manager's Friend?" pp. 52-54.



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98. November 1990, **Risk Management**, "A Risk Manager's Guide to Managing Adjusting Fees," pp. 40-41.
99. December 1990, **Claims**, "Santa Needs an Adjuster!," pp. 34-35.
100. January 1991, "Planned Retention: An Alternative to Insurance," **Medical Device & Diagnostic Industry**, pp. 54-58.
101. January 1991, "We Love Settlements!" [Co-authored with Cindy Khin] **For the Defense**, pp. 26-29.
102. January 1991, "Trimming Adjusting Fees: A Risk Manager's Checklist," **Claims Magazine**, pp. 40-41.
103. February 1991, "Surviving a Claims Audit," **Best's Review**, pp. 54-58.
104. Winter 1990, "Insider's Look at Claims Process Promises More Maalox Moments," **Claimsman Magazine**, pp. 22-23.
105. February 25, 1991, "Buyer's Guide is Small Firm's Godsend," Business Insurance, p. 20.
106. March 1991, "Loss Prevention for Medical Devices: Are You Prepared?" Medical Device & Diagnostic Industry, pp. 46-51.
107. March 1991, "Claim Audits: A Survival Guide," Claims Magazine, pp. 34-35.
108. April 1991, "Managing the Workers' Compensation Risk: The Claims Connection," Claims Magazine, pp. 44-46.
109. Spring 1991, "Claims Audits: A Survival Guide," The Claimsman, pp. 32-33.
110. April 15, 1991, "Party Smart: Special Event Risk Management," Business Insurance, p. 20.
111. April 22, 1991, "Spiraling Health Care Costs: Book Suggests Ways to Keep Benefit Dollars from Slipping Away," Business Insurance, p. 31.
112. Spring 1991, "Keeping Clergy Counseling Suits From Tearing at the Cloth," Concern, pp. 6-9.
113. May 1991, "Adjuster Safety: The Darker Side of Investigative Risk," Claims Magazine, pp. 40-41, 75-77.
114. June 1991, "Avoidance: Dodging the Liability Bullet," Medical Device & Diagnostic Industry, pp. 44-48.
115. June 1991, "Selecting the Right Adjusting Company," The Risk Report, Volume XIII, No. 10; pp. 1-8.
116. June 1991, "Expert Witnesses: Eggheads on the Half-Shell," Claims Magazine, pp. 54-58.
117. Summer 1991, "Managing Loss Adjustment Expenses: Strategies for Health Care Risk Managers," Perspectives in Healthcare Risk Management, Vol. 11, Number 3, pp. 7-8.
118. June 1991, "Ten Steps to Better Insurance Coverage," Consulting-Specifying Engineer, pp. 21-24.
119. July 1991, "Claims Automation: Avoiding the Byte of the RAM," Claims Magazine, pp. 35-36, 66.



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120. July 1991, "Risk Managers, Attorneys Showcase Ways to Contain Litigation Explosion," Claims Magazine, pp. 60-64.
121. July 22, 1991, "Book Details U.S. Legal System Run Rampant," Business Insurance, p. 42.
122. August 1991, "Shopping for Product Liability Insurance," Medical Device & Diagnostic Industry, pp. 34-38.
123. August 1991, "Claim Execs Battle the Bad Faith Bogeyman," Claims Magazine, pp. 70-73.
124. Fall 1991, "The Administration of Workers Compensation Claims," Assignment 5 in AIC 34 Course Guide Workers Compensation and Medical Aspects of Claims, pp. 143-170.
125. 9/9/91, "How to Stay Out of the Headlines," Business Insurance, p. 26.
126. September 1991, "Software Basics for Risk Managers," Claims Magazine, pp. 34-35.
127. September 1991, "Professional Liability Claims and Your Insurance," Consulting-Specifying Engineer, pp. 31-32.
128. Fall 1991, "Software Basics for Claim Professionals," The Claimsman, p. 17.
129. October 7, 1991, "Avoiding Pitfalls in Standard Endorsements," Business Insurance, p. 58.
130. October 1991, "Purchasing Workers' Comp Insurance: How to Broaden Coverage and Trim Costs," Occupational Health & Safety, pp. 101-104.
131. November 1991, "The Truth Behind Expert Witnesses," Risk Management, pp. 61-62.
132. Winter 1991, "Thirty Steps To Passing Your CPCU Exam," The Malvern Examiner.
133. November 1991, "Quality Control -- Auditing an Adjusting Company," Claims Magazine, pp. 38-40.
134. November 1991, "Quality, 'Platinum Rule,' Must Spur Claim Supervision, Experts Advise," Claims Magazine, pp. 70-74.
135. November 25, 1991, "Exploring the Junk Science Lotto," Business Insurance, p. 26.
136. December 1991, "How to Pick an Insurance Broker," Medical Device & Diagnostic Industry, pp. 32-36.
137. December 1991, "Open Wide and Say Aaaaaaaaaaaaaahhhhhhhhhhhhdit!" Claims Magazine, pp. 36-38.
138. January 1992, "Casting Out Stress: 20 Ways to Beat It," Claims Magazine, pp. 45-46, 52.
139. Winter 1991, "Text on Insurance Disputes Aims to be Industry Bible," The Claimsman, p. 19.
140. February 1992, "15 Ways to Find Study Time," Claims Magazine, pp. 44-46.
141. March 1992, "Long Term Career Planning: Rx For Adjuster Success," Claims Magazine, pp. 50-52.
142. April 6, 1992, "Getting to Know the 'Enemy,'" Business Insurance, p. 32.
143. April 1992, "Claims Audits," The Risk Report, pp. 1-8.



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144. April 1992, "A Manager's Guide to Claim and Risk Management Manuals," Claims Magazine, pp. 34-35.
145. April 1992, "Attaining the Gold Standard of Service," Risk Management, pp. 61-62. 146. April 25, 1992, "Cutting Work Comp Costs," Business Insurance.
146. April/May 1992, "The Product Liability Circus," Medical Industry Executive, pp. 39-40.
147. May 1992, "Happy Headhunting: Managing the Risk of Job Stagnation," Claims Magazine, pp. 36-38.
148. May 25, 1992, "Terminology Without Tears: Glossary Takes the Mystery Out of Insurance Industry Jargon," Business Insurance, p. 24.
149. June 1992, "Policyholder Litigation: Used or Abused?" Claims Magazine, p. 80.
150. June 1992, "Better Service from Outside Counsel Concern of Risk, Claims Managers," Claims Magazine, pp. 82-83.
151. 1992 (book), Claims Management: How to Select, Manage and Save Money on Adjusting Services, LRP Publications, Horsham, PA.
152. July 1992, "Warning Lights During Job Search Can Spell Danger," Claims Magazine, pp. 46-47.
153. July 1992, "Minimizing Product Liability Claims Through Early Intervention," Medical Device & Diagnostic Industry, pp. 40-43.
154. August 1992, "Changing Careers a Snap? Don't Bet on It," Claims Magazine, pp. 40-41.
155. August 10, 1992, "Avoiding the Risks of Unethical Conduct" (Book Review), Business Insurance, p. 20.
156. August 24, 1992, "The Chernobyl of Insurance: An Inside Look at Executive Life," (book review), Business Insurance, p. 20.
157. 1992, "Administration of Workers Compensation Claims," Principles of Workers Compensation Claims, Insurance Institute of America, pp. 137-186.
158. September 1992, "Taking the 'Ouch' Out of Workers' Compensation," Claims Magazine, pp. 34-36.
159. October 1992, "Medical Waste: The Risk Management Challenge," Medical Device & Diagnostic Industry, pp. 36-40.
160. October 1992, "Try Settling -- For Less!" Claims Magazine, pp. 34-36.
161. October 19, 1992, "Dancing With Lawyers -- Beyond the Same Old Two-Step," Business Insurance, p. 24.
162. October 1992, "Claims Audits," Assurances (Canadian Risk Management Journal), pp. 425-439.
163. November 1992, "Looking for Mr. (and Ms.) Goodclaim," Claims Magazine, pp. 38-39.
164. December 1992, "Breaking Up Isn't Hard To Do: Taking Your Adjusting Service in For Repairs," Claims Magazine, pp. 36-37.



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165. December 1992, "How to Get Better Service From Outside Legal Counsel," The Risk Report, Vol. XV, No. 4, pp. 1-8.
166. January 11, 1993, "White Collar Crime Woes: How to Prevent Prosecution for Executive Crimes," Business Insurance, p. 19.
167. January 1993, "Lower Cost, Better Coverage for Church Liability Insurance," Church Administration, pp. 17-19.
168. January 1993, "From Out-House to In-House: Bringing the Lawyer Inside," Claims Magazine, pp. 28-30.
169. February 1993, "In Defense of Defense Counsel," Claims Magazine, pp. 28-29.
170. February 1993, The Quality Plan: Practical Advice to Keep Claims Clients Coming Back (book), Seattle: Claims Books.
171. Winter 1993, Vol. 11, No. 1, "Common Claim Fallacies," CPCU Claims Quarterly, pp. 1-2.
172. February 1, 1993, "How To Keep Firms From Going Up In Smoke," (book review), Business Insurance, p. 20.
173. March 1993, "Common Claim Fallacies," Claims Magazine, pp. 31-32.
174. March 1993, "21 Tips For Better Adjuster-Client Relations," Claims Magazine, pp. 38-39.
175. April 1993, "16 Questions That Show a Client You Care," Claims Magazine, pp. 40-41.
176. May 1993, "Risk Managers, Adjusters Need to Strengthen the Claims Connection," Claims Magazine, pp. 43-48.
177. Summer 1993, "Using IME's to Manage Health Benefits," Managing Employee Health Benefits, Vol. 1, Issue 3, pp. 11-15.
178. May 17, 1993, "Mapping the Work Comp Maze," Business Insurance, p. 27.
179. May 24, 1993, "Helping All to Win in Workers Comp," Business Insurance, p. 21.
180. Spring 1993, "The Deadly Seven: Common Insurance Problems of Drug and Device Companies," Rx for the Defense, Vol. 1, No. 1, pp. 3-5.
181. June 1993, "Picking Legal Eagles: A Guide For Attorney Selection," The Risk Report, Vol. XV, No. 10, pp. 1-12.
182. June 1993, "How to Succeed at Workers' Compensation Hearings," Claims Magazine, pp. 30-32.
183. July 12, 1993, "Understanding D&O: Shouldn't Stand for 'Difficult and Onerous,'" Business Insurance, pp. 13-14.
184. July 1993, "Abort, Retry, Fail? Common Computer Bloopers -- And How To Avoid Them!" Claims Magazine, pp. 35-36.
185. August 1993, The Claims Environment (book), co-authored with James Markham and Layne Thompson, Insurance Institute of America, Malvern, PA.
186. August 1993, "Legal Eagles or Flock of Turkeys?" Claims Magazine, pp. 32-34.



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187. Summer 1993, "Strengthening the Loss Prevention - Claims Connection: 12 Practical Tips," Loss Control Quarterly, Vol. 4, No. 3, Society of CPCU, pp. 1-2.
188. September 1993, "Shopping For Liability Insurance," Second Source Imaging, pp. 50-55.
189. September 1993, "Risk Managing the Medical Waste Exposure: Strategies for Device Manufacturers," Medical Waste, Vol. 1, No. 12, pp. 11-15.
190. September 1993, "From Turkeys to Legal Eagles: Corrective Measures to Improve Legal Service," Claims Magazine, pp. 28-30.
191. September 1993, "Reservation of Rights Letters: A Risk Manager's Guide," The Risk Management Letter, Volume 14, Issue 3, pp. 2-4.
192. October 4, 1993, "A Good Book for Risk Managers Old and New," (book review of Essentials of Risk Management and Insurance) Business Insurance, p. 40.
193. October 1993, "Risk Managing the Adjuster's E&O Exposure," Claims Magazine, pp. 30-32.
194. November 1993, "Managing the Risk of Runaway Legal Fees," The Risk Report Vol. XVI, No. 3, pp. 1-12.
195. November 1993, "Risk Managing the Creature From the Superfund Lagoon," Claims Magazine, pp. 30-31, 87.
196. November 15, 1993, "Mapping the Way to Appropriate D&O Coverage," (book review) Business Insurance, p. 17.
197. December 1993, "Gearing Up For the Future: Claims Productivity Trends for the Nineties," Claims Magazine, pp. 40-46.
198. January 1994, "Here Come Da' Judge! Handling Settlement Conferences," Claims Magazine, pp. 26-27.
199. Fall 1993, "Curing `Gaposis': Avoiding Insurance Coverage Problems," Rx For The Defense, pp. 5-7.
200. February 1994, "The Truth About Structured Settlements," Claims Magazine, pp. 28-29.
201. March 1994, "Ten Ways to Save Money on Legal Fees," Claims Magazine, pp. 26-28.
202. April 1994, "Avoiding Common Product Liability Coverage Problems," The Risk Report
203. April 1994, "Is it Time for One-Stop TPA Shopping?" Claims Magazine, pp. 40-46.
204. May 1994, "Getting More Bang For Your Surveillance Buck," Claims Magazine, pp. 30-32.
205. May 16, 1994, "A Reference for Risk Managers," Business Insurance, p. 34.
206. June 13, 1994, "Safety Starts With Getting Enough Sleep," Business Insurance, p. 25.
207. June 1994, "Reversing Coverage Denials Takes Persistence," Claims, pp. 86-87.
208. June 1994, "Thinking the Unthinkable: When Products Go Boom!" Claims, pp. 88-89.
209. July 4, 1994, "Maximizing Success in Insurance Coverage Disputes," Business Insurance, p. 35.



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692. "Risk Managing Your Expert Witness Practice: Do You Need Liability Insurance Coverage?" *Expert Witness Chronicle*, April 2013, Vol. 2, Issue 2, pp. 12-15.
693. "Dedicated Claim Units: Upsides for Clients -- Perils for Adjusters," *CPCU Claims Interest Group Quorum*, June 2013, Volume 31, Number 2, pp. 5-6.
694. "How Likeable Should an Expert Witness Be?" *CPCU CLEW Section Quarterly*, June 2013, Volume 19, Number 2, pp. 9-10.



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695. "Avoiding Your Medical Device Tsunami: Managing Supply Chain Risks," *Medical Product Outsourcing*, July/August 2013, pp. 32-34.
696. "Onboarding New Claims Staff: Best (and Worst) Practices," *Claims Magazine*, August 2013, pp. 16-19.
697. "Communications @Risk: Managing Potential Liabilities from Physician Use of Email (Part 1 of 2)," *Medical Malpractice Law & Strategy*, September 2013.
698. "Fight or Flight? Navigating the Decision to Litigate in Product Liability Claims, (co-authored with Gretchen Schuler)," *Claims Management*, September 2013, pp. 46-49.
699. "Navigating the Bad Faith Claims Maze: 10 Keys to Avoid Litigation Landmines," *Claims Magazine*, September 2013, pp. 19-20.
700. "Dramatically Reduce EPL Defense Costs: Prevail with the EEOC," (co-authored with Brit Weimer, Esq.), *Litigation Management*, Fall 2013, pp. 30-31.
701. "Eight Tips in Deciding How Much Risk a Medical Manufacturer Should Retain," *Medical Product Outsourcing*, October 2013, pp. 26-27.
702. "How Soft Skills Complement Tech Fluency: Characteristics of Successful Claim Professionals," *Claims Magazine*, November 2013, pp. 24-27.
703. "The Ten Habits of Highly Effective Coverage Adjusters," *CPCU Society Claims Quorum*, December 2013, Volume 31, No. 4, pp. 5-7.
704. "2013 Holiday Gift Guide ..." *Claims Management Magazine*, December 2013, Issue 12, Volume 2, p. 29.
705. "Time Travel: What's Reasonable and Ethical When Charging for Travel?" (quoted in); *Litigation Management*, Winter 2014, p. 49.
706. "Managing Cyber Risks in Medical Technology," *Medical Product Outsourcing*, January/February 2014, pp. 26-29.
707. "Managing Cyber Risks in Medical Technology," *Orthopedic Design & Technology*, January/February 2014, pp. 34-37.
708. "The Policy Slipup: 10 Fatal Coverage Mistakes Adjusters Should Avoid," *Claims Management*, March 2014, Issue 3, Vol. 3, pp. 40-43.
709. "Spoliation and Subrogation: The Risk Manager's Role," *THE RISK REPORT*, April 2014, Volume XXVI, No. 8, International Risk Management Institute, pp. 1-9.
710. "Beast Mode: Managing Risks from Animal Activism," *Medical Product Outsourcing*, May 2014, pp. 32-34.
711. "Beast Mode: Managing Risks from Animal Activism," *Orthopedic Design & Technology*, May/June 2014, pp. 22-25.
712. "Surviving the Medical Malpractice Claim: Picking Legal Eagles," (Part One of Two) *Medical Malpractice Law & Strategy*, July 2014, pp.



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713. "To Win a Product Liability Claim, Pick the Right Litigator!" *Medical Product Outsourcing*, July/August 2014, pp. 24-25.
714. "Surviving the Medical Malpractice Claim: The Physician's Vital Role" (Part 2), *Medical Malpractice Law & Strategy*, August 2014.
715. "To Win a Product Liability Claim, Pick the Right Litigator," *Orthopedic Design & Technology*, July/August 2014, pp. 24-25.
716. "Six 'Soft Skills' for Today's Adjuster," *Claims Magazine*, September 2014, pp. 14-15.
717. "A View From Above: Four Liability Claims Implications of Drones," *Claims Management Magazine*, September 2014, pp. 42-44.
718. "Managing Reputational Risks for Medical Device Companies," *Medical Product Outsourcing* and *Orthopedic Design & Technology*, November/December 2014, pp. 26-27.
719. "To Settle or Defend? Eight Practical Considerations (Part 1 of 2)" *Medical Malpractice Law & Strategy*, January 2015.
720. "To Settle or Defend? Eight Practical Considerations (Part 2 of 2), *Medical Malpractice Law & Strategy*, February 2015.
721. "Risk Management Lessons From the Ebola Crisis," *The Risk Report*, March 2015, Volume XXXVII, No. 7, pp. 1-10.
722. "A View From Above: Implications of Drones," *Today's Insurance Professionals*, Summer 2015, Vol. 72, Issue 2, pp. 12-13.
723. "How to Bulletproof Your Firm from Expensive Employment Liability Risks," *Medical Product Outsourcing*, July/August 2015, pp. 26-29.
724. "Navigating Insurance Coverage Issues in Med Mal Litigation," (part one of two), *Medical Malpractice Law & Strategy*, August 2015, pp. 1-2, 7.
725. "Navigating Insurance Coverage Issues in Med Mal Litigation (part two of two), *Medical Malpractice Law & Strategy*, September 2015, pp. 3-4.
726. "Managing the Risk of Insurance Coverage Denials," *Medical Product Outsourcing*, October 2015, pp. 30-34.
727. "Keeping the Faith: Claims Professional or Archivist?" *Claims Management*, December 2015, pp. 10-13.
728. "The Dark Side of Claim 'Best Practices'" *Claims Magazine*, January 2015, pp. 32-33.
729. "Extracting the 'Consent to Settle': A Game Plan for Insurers and Defense Counsel," *Medical Malpractice Law & Strategy*, March 2016
730. "Careful Construction: Elements of Building the Ideal Claims Manual," (co-author), *Claims Management*, March 2016, pp. 31-33.
731. "Avoiding Bad Faith Perils of Defense-Within-Limits Policies," *Claims Magazine*, April 2016, pp. 26-27.



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732. "Should You Authorize that Summary Judgment Motion?" *Claims Magazine*, June 2016, pp. 18-19.
733. "Insurance Claim Ramifications of Virtual Reality Technology," *CPCU Insights*, Fall 2016, pp. 4-8.
734. "Building Your Medical Liability Risk Management Program" (Part 1 of 2), *Medical Malpractice Law & Strategy*, January 2017, Vol. 34, No. 3, pp. 1, 5-6.
735. "16 Secrets to Successful Client Claim Visits," *Claims Magazine*, January 2017, Vol. 65, No. 1, pp. 21-23.
736. "Building Your Medical Liability Risk Management Program" (Part 2 of 2), *Medical Malpractice Law & Strategy*, February 2017, **Vol. 34, No. 43**.
737. "Parrying the 'Do You Advertise?' Deposition Question," *AAIMCo Newsletter*, American Association of Insurance Management Consultants, February 2017, pp. 9-10.
738. "Rocking Your Next Meeting: How to Maximize Your Claim Conference Attendance," *The CLM Magazine*, March 2017, (co-authored with Donna Popow), pp. 57-60.
739. "Managing Cyber Risks in Medical Practices (Part 1 of 2)," *Medical Malpractice Law & Strategy*, July 2017.
740. "Managing Cyber Risks in Medical Practices (Part 2 of 2)," *Medical Malpractice Law & Strategy*, August 2017.
741. "Managing the Risk of Institutional Bad Faith Claims," *CPCU INSIGHTS*, Fall 2017, pp. 21-31.
742. "Retooling the Review: Tips for Improving the Dreaded Claims Performance Ritual," (co-authored with Donna Popow), *The CLM Magazine*, September 2017, Issue 9, Vol. 1, pp. 42-45.
743. "Ten Habits of Highly Effective Coverage Adjusters," *CPCU INSIGHTS*, Winter 2017, pp. 15-17.
744. "Physician Expanders or Liability Extenders?" *Medical Malpractice Law & Strategy*, January 2018, pp. 1-5.
745. "6 Keys to Navigating the Independent Counsel Minefield," *Claims Magazine*, March 2018, Volume 66, Number 3, pp. 30-31.
746. "Nine Case-Retention 'Red Flags' Spelling W-A-R-N-I-N-G for Expert Witnesses," *CPCU Society CLEW News*, Spring 2018, Volume 2, Issue 2, pp. 5-8.
747. "What Makes a Successful Expert Witness?" *CLM Magazine*, May 2018, pp. 24-27.
748. "Six Claims Lessons from Game of Thrones," *CPCU INSIGHTS*, Fall 2018, pp. 8-12.
749. "Weaving a Continuing Education Culture into Your Insurance Department," *CPCU CLEW Interest Group Newsletter*, Winter 2019, Volume 3, Issue 1, pp. 4-6.
750. "Nine Case-Retention Red Flags for Insurance Expert Witnesses," *CPCU INSIGHTS*, Spring 2019, pp. 24-31.



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751. “The Essential Bookshelf for Expert Witnesses,” *CPCU CLEW News*, Spring 2019, Volume 3, Issue 2, Published by the CPCU Society’s Coverage, Lawyers, Educators & Witness Interest Group, pp. 9-11.
752. “Adjusters in the Crosshairs: Rethinking *Keodalah* and Bad Faith Liability,” *CPCU INSIGHTS*, Summer 2019, pp. 14-20.
753. “As You Head to Trial, Are You Riding a Thoroughbred ... or a Donkey?” *CPCU CLEW Newsletter*, Fall 2019, Vol. 3, Issue 4, pp. 11-13.
754. “The Quest for Inoculation: Helping Insurers Avoid Extracontractual Liability From Litigation Management,” *CPCU INSIGHTS*, Winter 2019, pp. 12-17.
755. 746. “Beyond the Designation: Self-Education as a Career Skill,” *CPCU CLEW News*, Winter 2020, Volume 4, Issue 1, pp. 13-16.
756. “Celebration or Caution? Reassessing Adjuster Personal Liability Post-*Keodalah*,” (Co-authored with Paul Rosner, Esq.), *CPCU INSIGHTS*, Spring 2020, pp. 6-10.
757. “Maximize Your Deposition Effectiveness by Knowing Your Aims ... and Opposing Counsel’s!” *CPCU CLEW Interest Group Newsletter*, Spring 2020, pp. 23-26.
758. “Beyond Bromides: Operationalizing a ‘Reasonable’ Covid-19 Investigation,” *CPCU CLEW Newsletter*, Summer 2020, Volume 4, Issue 3, pp. 14-17.
759. “Beyond Bromides: Operationalizing a ‘Reasonable’ Covid-19 Investigation,” *Oregon Claims Adjusters Association Newsletter*, August 2020, pp. 9-13.
760. Beyond Bromides: Operationalizing a ‘Reasonable’ Covid-19 Investigation,” *Puget Sound Adjusters Association Newsletter*, August 2020, pp. 1-3.
761. “Navigating ‘Consent to Settle’ Roadblocks in Professional Liability Litigation,” *CPCU CLEW Interest Group Journal*, Fall 2020, pp. 6-13.
762. “Battling the Bad Faith Covid 19-Boogeyman: ‘Deficient Investigation’ Claims,” *CPCU INSIGHTS*, Winter 2020, Vol. 7, Issue 4, pp. 14-19.
763. “Be Reasonable While Investigating a Covid Claim,” *The Fine Print*, January 2021, Vol. 1, Issue 1, pp.17-18.
764. “Writing a Bulletproof Expert Witness Report,” *CLEW News* (Coverage, Legal, Educators & Witnesses CPCU Interest Group, Spring 2021, Vol. 5, Issue 2, pp. 3-6.
765. “The Life-Changing Magic of Tidying Up ... Your Litigation Budget,” *L’CREW News*, CPCU Society Newsletter, Fall 2021, Vol. 5, Issue 3, pp. 8-11.
766. “Busting the Bad-Faith Myth of Adjuster Bonus Incentives,” *CPCU INSIGHTS*, Summer 2022, pp. 7-12.



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Speeches and Insurance Course Instructor Roles

1. "How Brokers Can Aid the Claims Process," 5/15/88, Brokers' Advisory Council, Westin Hotel, Washington, D.C.
2. "What Insurers Expect from their Defense Attorneys." 6/22/88. Puritan-Bennett Seminar on Defending Health Care Manufacturers from Product Liability Claims. LaCosta Resort & Spa, Carlsbad, CA.
3. "Issues in Civil Justice Reform." 7/28/88. MEDMARC Loss Prevention Seminar. Airport Marriott, San Francisco, CA.
4. Instructor for AIC 30 "Introduction to Claims" Course 9/88-12/88, Sponsored by Washington DC Chapter of CPCU, GEICO Corporate Headquarters, Washington, DC.
5. "Claim Service Audits." 10/21/88. MEDMARC Insurance Company Annual Meeting. Mariner's Inn, Hilton Head, SC.
6. "Product Liability Tort Reform." 12/1/88. CIGNA Loss Prevention Seminar. Westin Hotel, Washington, DC.
7. Instructor in AIC 30 "Introduction to Claims" Course 2/89-4/89, sponsored by Washington DC Chapter of CPCU, GEICO Corporate Headquarters, Washington, DC.
8. "Medical Device Claims." 3/23/89. American Society for Quality Control, Hyatt Regency Bethesda, Bethesda, MD.
9. "Litigation Management: From the Corporate Perspective." 3/31/89. American Law Firm Association. Four Seasons Hotel, Philadelphia, PA.
10. "Managing Legal Fees - Alternatives to Wallet-ectomy," (Moderator), 4/11/89 & 4/13/89, Annual Risk & Insurance Managers Society (RIMS) Convention, Atlanta, GA.
11. "Litigation Management for Insurance, Risk and Claim Professionals," 5/22/89, Seminar sponsored by Washington D.C. Chapter of CPCU, GEICO Corporate Headquarters, Washington, DC.
12. "Six Steps to a Claims System Checkup," 6/14/89, Puritan-Bennett Seminar on Defending Health Care Manufacturers, Westin Resort, Hilton Head, SC.
13. "How to Give Yourself a Claim System Checkup," 7/12/89, MEDMARC Loss Prevention Seminar, Airport Radisson, San Francisco, CA.
14. Instructor for CPCU 4 Course: Commercial Liability Risk Management & Insurance, 9/89-1/90; GEICO Corporate Headquarters, Washington, DC.
15. "Avoiding the Big Hit - Creative Strategies for Claim Defense," 9/23/89, MEDMARC Fall Educational Conference, Basin Harbor Club, Vergennes, VT.
16. "The Uneasy Triumvirate: The Claims Manager's Perspective on Product Liability Defense," 2/2/90, Defense Research Institute Seminar on Product Liability, Pan Pacific Emerald Hotel, Anaheim, CA.



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17. "How to Save Money on Product Liability Claims," 3/13/90, Rollins Burdick Hunter Seminar, Downtown Plaza Marriott, Minneapolis, MN.
18. "Medical Device Claims: The Insurer's Perspective," 4/5/90, Defense Research Institute Drug & Device Litigation Seminar, Downtown Sheraton, New Orleans, LA.
19. "Managing Legal Fees: MORE Alternatives to Wallet-ectomy," 5/1/90 and 5/3/90, Risk and Insurance Management Society (RIMS) Annual Convention, Hynes Convention Center, Boston, MA.
20. "Questions About the NEW CGL Policy? Ask the Claims Department!," 5/22/90, D.C. Chapter Society of CPCU, Tysons Corner Marriott, Tysons Corner, VA.
21. "Coordinating Defense Against Product Liability Suits," 6/6/90, Marsh & McLennan, Inc., Sheraton Needham Inn, Needham Heights, MA.
22. "Aggressive Techniques for Claim Defense and Program Service," 8/17/90, Vermont Captive Insurance Association Annual Convention, Burlington Sheraton Hotel & Convention Center, Burlington, VT.
23. "Insurers, Manufacturers and Defense Attorneys: The Uneasy Triumvirate," 9/14/90; McGuire, Woods, Battle & Boothe Seminar on "Product Liability Risks in a Global Market," Fort Magruder Inn, Williamsburg, VA.
24. "Litigation Management," (two back-to-back seminars) 10/24/90, International Risk Management Institute Annual Construction Insurance Conference, The Fairmont Hotel, Chicago, IL.
25. "Effective Labeling and Warnings," 10/25/90, MEDMARC Loss Prevention Seminar, O'Hare Soffitel Hotel, Chicago, IL.
26. "An Overview of the CPCU Program," 12/10/90, Young Agents of Northern Virginia, Charles Gibson Insurance Agency, 10501 Braddock Rd., Fairfax, VA.
27. "Protecting Against Manufacturer's Product Liability," 1/18/91, National Health Lawyers Association, The Grand Hyatt Washington, Washington D.C.
28. "Emergent Trends in Medical Device Litigation," 1/23/91, Medical Design & Manufacturing West Conference and Exposition, Disneyland Hotel Convention Center, Anaheim, CA.
29. "Quinley's Quirks of Medical Device Claims Reporting," 3/1/91, MEDMARC Loss Prevention Seminar, Marriott Resort, Newport Beach, CA.
30. "In Search of Law Firm Excellence: How to Keep Insurance Clients Happy," 4/6/91, Law Firm of Rhodes Hieronymous Jones Tucker & Gable, Shangri-La Conference Center, Afton, OK.
31. "Commercial Liability Risk Management & Insurance," CPCU 4; 15-part course February - June 1991, Hartford Insurance Company, Alexandria, VA.



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32. "The Early Evaluation Approach to Complex Product Liability Defense," 10/18/91, New York State Bar Association Seminar, Hyatt Regency, Buffalo, NY.
33. "How to Study for Your IIA/CPCU Exam," 11/9/91, Sponsored by Washington D.C. Chapter of CPCU, Aetna Casualty & Surety Company Regional Office, Fairfax, VA.
34. "Commercial Insurance," INS 23 Class; 12-part course sponsored by the Washington D.C. Chapter of CPCU, August - November 1991, Firemens Fund Insurance Company, Fairfax, VA.
35. "Legal Bill Auditing: In Search of Law Firm Excellence," 3/26/92, American Law Firm Association Client Seminar, Ritz Carlton, Amelia Island, FL.
36. "How to Get Better Service From Outside Counsel," 3/31/92 and 4/1/92, Risk & Insurance Management Society (RIMS) Annual Convention, Anaheim Convention Center, Anaheim, CA.
37. "An Introduction to Life Insurance," 4/8/92, INS 22 ("Personal Lines Coverage") Class sponsored by the Washington D.C. Chapter of CPCU, Firemens Fund Insurance Company, Fairfax, VA.
38. "Commercial Liability Risk Management and Insurance," CPCU 4; 15-part course; February - June 1992, Travelers Insurance Company, Falls Church, VA.
39. "How to Get Better Service From Outside Counsel," 6/3/92, Training session for United Educators Insurance Risk Retention Group and Victor O. Schinnerer, Chevy Chase, MD.
40. "Managing the Claims Function," 11/4/92, International Risk Management Institute Conference on Construction Risk Management, Sheraton Hotel, New Orleans, LA.
41. "Products Liability 101," 12/9/92, C.R. Bard Inc. Corporate Headquarters, 730 Central Avenue, Murray Hill, NJ.
42. "Disaster Planning and Response: Lessons Learned From Hurricane Andrew" (Panel Moderator), 3/22/93, Capitol "I" All-Industry Insurance Day, Crystal City Sheraton, Arlington, VA.
43. "Risk Managing the Medical Waste Exposure," 4/27/93, Technomic Publishing Company, Third Annual Conference on Packaging Healthcare Devices and Products, Sheraton Society Hill, Philadelphia, PA.
44. "Commercial Liability Risk Management and Insurance," CPCU 4 Course Instructor; February 1993 - June 1993, St. Paul Insurance Company, Fair Lakes, VA.
45. "Legal Bill Audits: Do You Need Them?" 8/12/93, Santa Clara CA Chapter of RIMS, Marriott, Santa Clara, CA.
46. "Quality Issues in Claim Service," 9/28/93, National Association of Independent Insurance Adjusters, Newport Marina & Hotel, Newport, R.I.
47. "Time Management for Claim Professionals," 9/28/93, National Association of Independent Insurance Adjusters, Newport Marina & Hotel, Newport, R.I.



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48. "Claim Audits," 11/10/93, International Risk Management Institute Annual Conference, Nashville Convention Center, Nashville, TN.
49. "INS 21 - Property and Liability Insurance Principles," September-December 1993, Course Leader for Class Sponsored by D.C. CPCU Chapter, Fairfax, VA.
50. "Effective Litigation Management in the Age of Cost Control," 12/7/93, The Corporate Counsel Institute, Washington Marriott, Washington, D.C.
51. "What's Hot -- What's Not in Medical Device Litigation," 2/1/94, Medical Device Manufacturing West Conference, Anaheim Hilton, Anaheim, CA.
52. "Are You Being Served? Getting Better Service from Legal Counsel," 3/10/94, Massachusetts RIMS Conference Annual Meeting, Bentley College, Waltham, MA.
53. "How to Turbo-Charge Your Claims Management," 3/17/94, SEAK Third Annual Conference on Occupational Injury and Disease, Hyatt Regency Embarcadero, San Francisco, CA.
54. "Occupational Disease Claims: Spot the Invalid Invalid," 4/18/94, 32nd Annual Risk and Insurance Management Society (RIMS) Conference, Morial Convention Center, New Orleans, LA.
55. "Winning the Product Liability Claim Game," 4/22/94, 32nd Annual Risk and Insurance Management Society (RIMS) Conference, Morial Convention Center, New Orleans, LA.
56. "INS 23 -- Commercial Insurance," Spring 1994, Course Sponsored by D.C. Chapter of CPCU, Fairfax, VA.
57. "Beyond the Designation: Where do We Go From Here?" 4/29/94, Aetna C&S Recognition Breakfast, Aetna C&S, Fair Lakes, VA.
58. "How to Keep Clients Happy," June 17, 1994, Puritan-Bennett Seventh Annual Conference on Health Care Defense, The Westin Resort, Vail, CO.
59. "Cutting Edge Strategies for Litigation Cost Containment," September 23, 1994, Product Liability Institute, Corporate Counsel Division, The Knickerbocker Hotel, Chicago, IL.
60. "In Search of Law Firm Excellence: The Service Edge," October 8, 1994, Virginia Association of Defense Attorneys 20th Annual Convention, Airport Marriott, Roanoke, VA.
61. "What's Hot -- What's Not . . . in Medical Device Litigation," October 14, 1994, MEDMARC Risk Management Seminar, Newport Beach Marriott and Racquet Club, Newport Beach, CA.
62. "Avoiding and Fighting Workers' Compensation Claims From a Laid-Off Worker," November 3, 1994, Third Annual National Workers Compensation & Disability Conference, Hyatt Regency, Chicago, IL.
63. "Optimal Product Safety Management Techniques," March 14, 1995, The Product Liability Institute for Corporate Counsel, Sheraton City Centre, Washington D.C.



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64. "Effective Litigation Management in the Age of Cost Control," March 14, 1995, The Product Liability Institute for Corporate Counsel, Sheraton City Centre, Washington, D.C.
65. "Time Management for Claim Professionals," March 31, 1995, State Insurance Adjusters of Indiana Spring Conference, Waterfront Best Western, Indianapolis, IN.
66. "In Search of Claims Excellence: Customer Service in the Nineties," April 13, 1995, Washington D.C. Claims Association, Westwood Country Club, Vienna, VA.
67. "How to Pass Your IIA/CPCU Exam," April 14, 1995, Aetna C&C, Fair Oaks, Fairfax, VA.
68. "Beyond the Timesheet: Creative Strategies for Managing Legal Fees," April 24, 1995, Annual RIMS Conference, Moscone Convention Center, San Francisco, CA.
69. "The ABC's of Claims Management," April 25, 1995, Annual RIMS Conference, Moscone Convention Center, San Francisco, CA.
70. "Turning Down the Heat: Give Yourself a Product Liability Checkup," May 21, 1995, Association for the Advancement of Medical Instrumentation Annual Conference, Disneyland Conference Center, Anaheim, CA.
71. CPCU 6 Course Leader, "Legal Environment of Insurance," sixteen classes from February through June 1995, Aetna C&S, Fairlakes, VA.
72. "MEDMARC Comes of Age," June 16, 1995, Puritan-Bennett Health Care Defense Conference, The Resort at Squaw Creek, Lake Tahoe Olympic Village, CA.
73. "Selecting and Managing Expert Witnesses and Attorneys," June 23, 1995, SEAK Fourth Annual National Expert Witness and Litigation Seminar, Tara Hyannis Hotel & Resort, Hyannis, MA.
74. "Preparing for Your Day in Court," August 16, 1995, Tenth Annual Vermont Captive Insurance Association Annual Conference, Sheraton Convention Center, Burlington, VT.
75. "The Seven Habits of Highly Effective Risk Managers," September 19, 1995, Potomac - Washington D.C. RIMS Chapter, Hyatt Regency, Bethesda, MD.
76. "Coping With Your Claims Meltdown," September 29, 1995, MEDMARC Loss Prevention Seminar, Airport Hyatt, San Francisco, CA.
77. "The Seven Habits of Highly Effective Risk Managers," October 13, 1995, Crawford Risk Sciences Group Tenth Annual Partners' Conference, The Broadmoor, Colorado Springs, CO.
78. "Avoiding and Fighting the Workers Comp Claim of the Laid-Off Worker," November 17, 1995, Fourth Annual National Workers Compensation and Disability Conference, LRP Publications and the Axon Group, Chicago Hilton and Towers, Chicago, IL.
79. "The Seven Habits of Highly Effective Risk Managers," November 29, 1995, United Educators Risk Retention Group, Chevy Chase, MD.



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80. CPCU 7 Course Leader -- "Management," September '95 - January 1996, Allstate Insurance Company Regional Office, Fairfax, VA.
81. "The 20-Minute Insurance Checkup: Broader Coverage at Lower Cost," April 11, 1996, The TEC Group, International Organization of CEO's, Holiday Inn, Silver Spring, MD.
82. INS 21 Course Leader -- "Property & Liability Insurance Principles," January 1996-May 1996, MEDMARC Insurance Company, Fairfax, VA.
83. "Cyber-ians at the Gate: Harnessing the Internet for Claims Management," April 23, 1996, RIMS Conference, Toronto Convention Centre, Toronto, Canada.
84. "Speed Bumps on the Information Superhighway," April 23, 1996, Annual RIMS Conference, Toronto Convention Centre, Toronto, Canada.
85. "The ABC's of Claims Management," April 24, 1996, Annual RIMS Conference, Toronto Convention Centre, Toronto, Canada.
86. "The Seven Habits of Highly Effective Defense Attorneys," June 21, 1996, Nellcor Puritan Bennett Conference on Medical Device Litigation, The Kingsmill Conference Center, Williamsburg, VA.
87. "Harnessing the Internet and Captive Success," August 13, 1996, Vermont Captive Insurance Association Annual Conference, Sheraton Convention Center, Burlington, VT.
88. "The Seven Habits of Highly Effective Risk Managers," September 5, 1996, Virginia Chapter of Risk and Insurance Management Society (RIMS), The Cascades Conference Center, Williamsburg, VA.
89. "Time Management for Claim Professionals," September 27, 1996, Annual Conference of Society of Claim Law Professionals, Harbor Court Hotel, Baltimore, MD.
90. "Speed Bumps on the Information Superhighway," October 17, 1996, Washington D.C. Chapter of CPCU Society, Bethesda Marriott, Bethesda, MD.
91. "Avoiding and Defending the Comp Claim of Laid Off Workers," November 13, 1996, LRP Workers Compensation and Disability Expo, Chicago Hilton and Towers, Chicago, IL.
92. "The Seven Habits of Highly Ineffective 'Net Surfers," November 19, 1996, Los Angeles Area CPCU All Industry Day, Universal City Sheraton, Universal City, CA.
93. "The Seven Habits of Highly Effective Claim Professionals," January 15, 1997, Hampton Roads Claims Association, The Aberdeen Barn, Virginia Beach, VA.
94. "Workers Compensation Claims Management," February 27, 1997, Washington D.C. Chapter, CPCU, "Brown Bag Breakfast" Series, Hartford Insurance Company, Alexandria, VA.
95. "The Seven Habits of Highly Effective Claim Professionals," March 6, 1997, National Association of Independent Insurance Adjusters Advanced Adjuster Seminar, The Westin Perimeter Place, Atlanta, GA.



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96. "Risk Managing Your Clinical Trials Crisis," March 20, 1997, Minet Gallagher - Warner & Stackpole Seminar on "Current Issues in Clinical Trials," Marriott, Burlington, MA.
97. "Managing the Corporate Risk of Fatigue," April 17, 1997, Annual RIMS Conference, Georgia World Congress Center, Atlanta, GA.
98. "Practical Litigation Management," May 19, 1997, Annual PRIMA (Public Risk and Insurance Management Association) Conference, Albuquerque Convention Center, Albuquerque, NM.
99. CPCU 6 Course Leader, "Legal Environment of Insurance," February - June 1997, for the Washington D.C. CPCU Chapter, Hartford Insurance Company, Alexandria, VA.
100. "The Seven Habits of Highly Effective Claim Professionals," August 12, 1997, Fredericksburg Claim Association, Lone Star Steakhouse, Fredericksburg, VA.
101. "Natural Born Billers: An Adjuster Looks at Legal Fee Audits," October 9, 1997, Washington D.C. Claims Association, Westwood Country Club, Vienna, VA.
102. "Natural Born Billers: An Adjuster Looks at Legal Fee Audits," October 15, 1997, Hampton Roads Claims Association, The Aberdeen Barn, Virginia Beach, VA.
103. "Surfing the `Net for Claims Excellence," October 29, 1997, Business Strategy Network Conference on "Insurance and the Internet," The New York Palace Hotel, New York City.
104. "Turbo-Charge Your Litigation Management Skills," November 7, 1997, Adjusters Conference and Expo sponsored by Claims magazine, The Riviera Hotel, Las Vegas, NV.
105. "Doc's and Medical Devices: The Uneasy Alliance," November 13, 1997, Professional Liability Underwriting Society (PLUS) Tenth Annual Conference, Sheraton Towers, Chicago, IL.
106. "Surfing the `Net for Claims Excellence," December 4, 1997, Business Strategy Network Conference on "Claims Cost Control and Litigation Management," The Helmsley Hotel, New York City.
107. "The Seven Habits of Highly Effective Risk Managers," January 23, 1998, Montgomery County Maryland Annual Risk Management Retreat, William F. Bolger Center for Leadership Development, Potomac, MD.
108. "Surfing the `Net for Claims Excellence," March 6, 1998, Capital "I" All-Industry Day, Sheraton Suites, Alexandria, VA.
109. "The Seven Habits of Highly Effective Claim Professionals," May 27, 1998, Richmond Claim Association, Holiday Inn Crossroads, Richmond, VA.
110. CPCU 7 – "Management" Course Leader, February - June 1998, Washington D.C. Chapter of CPCU, Sedgwick James of Virginia, Falls Church, VA.



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111. “Hot Issues in Medical Device Litigation” (speaker and panel discussion moderator), June 26, 1998, Mallinckrodt Health Care Defense Symposium, The Sagamore, Bolton Landing, NY.
112. “Managing Your Product Liability Risk,” October 13, 1998, Kentucky Chamber of Commerce, The Hilton Seelbach Hotel, Louisville, KY.
113. “Surfing the `Net for Claims Excellence,” November 13, 1998, Second Annual Adjuster Conference & Expo (ACE), Adams Mark Hotel, St. Louis, MO.
114. “Avoiding Insurance Burnout,” November 17, 1998, Virginia All-Insurance (“I”) Day, Richmond Marriott, Richmond, VA.
115. “In Defense of Defense Counsel: Eight Ways to be a Better Client,” January 23, 1999, The Harmonie Group Winter Conference, The Wyndham Resort & Spa, Fort Lauderdale, FL.
116. Turbo-Charging Your Workers Compensation Claims Management,” March 25, 1999, SEAK Inc. Annual Workers Compensation Defense Conference, The Wyndham Emerald Plaza, San Diego, CA.
117. “Defending, Preventing and Winning Workers Comp Claims From Laid-Off Workers,” March 25, 1999, SEAK Inc. Annual Workers Compensation Defense Conference, The Wyndham Emerald Plaza, San Diego, CA.
118. ”Managing the Catastrophic Injury Claim,” April 14, 1999, 37th Annual Risk and Insurance Management Society (RIMS) Conference, The Dallas Convention Center, Dallas, TX.
119. “Turbo-Charge Your Claims Negotiating!” May 3, 1999, Republic Western Insurance Company Managers Meeting, The Sheraton Falls View, Niagara Falls, Ontario, CN.
120. “Surfing the `Net for Claims and Litigation Management Excellence,” June 3, 1999, Insurance Institute of Indiana Annual Defense Seminar, Holiday Inn North at The Pyramids, Indianapolis, IN.
121. Panel Discussion Moderator “Hot Issues in Medical Device Defense” June 22, 1999, Twelfth Annual Medical Device Defense Seminar, Hyatt Palmetto Dunes Resort, Hilton Head, S.C.
122. “Avoiding Adjuster Burnout,” October 1, 1999, Virginia State Claims Association Annual Convention, The Sheraton Inn, Fredericksburg, VA.
123. “When Worlds Collide: Defending Claims Against Doctors and Medical Product Manufacturers,” October 7, 1999, Defense Research Institute Annual Conference, Hilton New York Towers, New York, NY.
124. “In Defense of Counsel: Eight Ways to be a Better Client,” October 16, 1999, Business Counsel Inc. Conference, The LaQuinta Resort & Spa, LaQuinta, CA.
125. “Improving Legal Services on a Tight Budget,” November 5, 1999, Third Annual Adjuster Conference & Expo (ACE), Baltimore Convention Center, Baltimore, MD.



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126. “Turbo-Charge Your Claim Negotiating!” November 16, 1999, Erie Insurance Company Corporate Headquarters, Erie, PA.
127. “Time Management for Claim Professionals,” March 23, 2000, Crawford & Company Training Session, New York, NY.
128. “Accident Investigation – Tool or Trap?” May 1, 2000, Annual Risk & Insurance Management Society (RIMS) Conference, Moscone Convention Center, San Francisco, CA.
129. “Getting Champagne Legal Service on a Beer Budget,” May 2, 2000; Annual Risk & Insurance Management Society (RIMS) Conference, Moscone Convention Center, San Francisco, CA.
130. “Managing Product Liability Claims,” May 23, 2000, Arrow International Corporate Staff, Arrow International Corporate Headquarters, Reading, PA.
131. “Managing Professional Transitions: A Client’s Perspective,” June 16, 2000, MEDMARC Defense Counsel Meeting, Jackson Lake Lodge, Jackson Hole, WY.
132. “Turbo-Charge Your Workers Compensation and Disability Claims Management!” Sixteenth Annual ReliaStar ROSE Seminar, July 30, 2000, Marriott City Center, Minneapolis, MN.
133. “Avoiding Burnout and Achieving Balance,” Association of Government Risk Pools Executive Conference, August 9, 2000, Omni Interlocken Resort, Broomfield, CO.
134. “The Seven Habits of Highly Effective Risk Pool Managers,” Association of Government Risk Pools Executive Conference, August 10, 2000, Omni Interlocken Resort, Broomfield, CO.
135. “Time Management for Workers Compensation Professionals,” September 27, 2000, 55th Annual Florida Workers Compensation Educational Conference, The Peabody Hotel, Orlando, FL.
136. “Insurance Implications of FDA MAUDE/Medwatch Reporting,” October 3, 2000, Regulatory Affairs Professionals Society (RAPS) Annual Conference, Marriott Wardman Park Hotel, Washington, D.C.
137. “Handling the Catastrophic Injury Case” (Moderator), October 27, 2000, Fourth Annual Adjuster Conference & Expo (ACE Conference), Phoenix Civic Plaza, Phoenix, AZ.
138. “Merging New Technologies Into the Claims Process,” October 27, 2000, Fourth Annual Adjuster Conference & Expo (ACE Conference), Phoenix Civic Plaza, AZ.
139. “The Seven Habits of Highly Effective Part-Time Risk Managers,” November 17, 2000, Park District Risk Management Agency Annual Risk Management Institute, Hamburger University, Oak Brook, IL.



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140. "Achieving Balance and Avoiding Burnout," November 17, 2000, Park District Risk Management Agency Annual Risk Management Institute, The Hyatt Lodge, Oak Brook, IL.
141. "Managing the Long-Term Care Claim," May 3, 2001, Crittenden Medical Insurance Conference, Washington Marriott, Washington, D.C.
142. "Medical Device Litigation – 2001," June 22, 2001, "Medical Device Defense Conference," Lake Las Vegas Hyatt Regency Resort, Henderson, NV.
143. "Investigating Mold Claims From A to Z" (moderator), October 8, 2001, Fifth Annual Adjuster Conference & Expo, Tampa Convention Center, Tampa, FL.
144. "How to Get Better Service From Outside Counsel," October 8, 2001, Fifth Annual Adjuster Conference & Expo, Tampa Convention Center, Tampa, FL.
145. "Preventing and Defending Claims From Over-Promotion and Advertising," October 17, 2001, Canon Communications Medical Device Manufacturing Conference & Expo, Minneapolis Convention Center, Minneapolis, MN.
146. "Risk Management Implications of FDA Reporting," Regulatory Affairs Professionals Society (RAPS) Annual Conference, November 6, 2001, Baltimore Convention Center, Baltimore, MD.
147. "Common Coverage Gaffes, Gaps and Bloopers," May 9, 2002, Crittenden Medical Insurance Conference, The Marriott Quorum Galleria, Dallas, TX.
148. "Hard Market Survival Tips," June 6, 2002, American Law Firm Association Healthcare Practice Conference, The Westin on Michigan Avenue, Chicago, IL.
149. "Managing Catastrophic Workers Compensation Claims," 22nd Annual Workers Compensation & Occupational Health Conference, SEAK, Inc, The Sheraton Resort, Hyannis, MA.
150. "Preventing Workers compensation and EPL Claims From Layoffs," 22nd Annual Workers Compensation & Occupational Health Conference, SEAK, Inc, The Sheraton Resort, Hyannis, MA.
151. "Product Liability Insurance Implications of DNA Testing," August 11, 2002, American Bar Association Annual Conference – Tort & Insurance Practice Section, J.W. Marriott Hotel, Washington, D.C.
152. "Claim Lessons of 9/11," August 15, 2002, Fifth Annual P&C Claims Congress, Global Business Research, The Wyndham Northwest Chicago, Itasca, IL.
153. "Adventures in Coverage Interpretation," September 13, 2002, ACE/SCLA Conference, The Gaylord Palms Convention Center, Orlando, FL.
154. "Managing the Litigation Process," September 14, 2002, ACE/SCLA Conference, Gaylord Palms Convention Center, Orlando, FL.



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155. “Time Management for Workers Compensation Claim Professionals,” October 25, 2002, Florida Workers Compensation Claim Association Conference, Tampa Convention Center, Tampa, FL.
156. “Insurance Lessons of 9/11 . . .” November 8, 2002, Central Illinois CPCU All-Industry Day, Illinois State University, Normal, IL.
157. “Pass the Maalox – Twelve Adjuster Stress-Busters,” January 9, 2003, Washington D.C. Claims Association, Martin’s Crosswinds, Greenbelt, MD.
158. “Insurance Coverage Issues in Drug and Device Litigation,” February 4, 2003, Mealey’s Medical Device and Pharmaceutical Litigation Conference, The Ritz Carlton, Phoenix, AZ.
159. “Time Management for Claim Professionals,” March 26, 2003, City and County of Denver, CO, Denver, CO.
160. “Turn Your Customers Into Raving Fans!” May 22, 2003, National Association of Independent Insurance Adjusters Annual Conference, Bally’s Las Vegas, NV.
161. “Successfully Implementing an Imaging System into Your Claims Department,” June 10, 2003, P&C Claims Congress, Hotel Allegro, Chicago, IL.
162. “Executive Roundtable – What Works and What Doesn’t in New Claim Technologies?” June 11, 2003, P&C Claims Congress, Hotel Allegro, Chicago, IL.
163. “Current Trends in Medical Device Litigation,” June 27, 2003, Annual Medmarc Defense Counsel Conference, The Grove Park Inn, Asheville, NC.
164. “Natural Born Billers: Computerized Tools for Legal Cost Management,” October 28, 2003, Annual Adjuster Conference and Expo (ACE/SCLA), The Washington State Convention Center, Seattle, WA.
165. “Nine Ways to Turbo-Charge Your Claim Service,” February 20, 2004, P&C Claims Congress – Global Business Research, The Sunburst Resort, Scottsdale, AZ.
166. “Nine Ways to Turbo-Charge Your Claim Service,” March 24, 2004, Association of Florida Property & Casualty Claim Professionals, The Lakeland Center, Lakeland, FL.
167. “The Seven Habits of Highly Effective Risk Management,” March 31, 2004, The Management Roundtable Conference on Quality in Medical Device Manufacturing, The U.S. Grant Hotel, San Diego, CA.
168. “Defending the Indefensible: Code Blue for Nursing Home Litigation,” May 7, 2004, Crittenden Medical Insurance Conference, The Bahia Resort, San Diego, CA.
169. “Five Things Your Corporate Claims Policy *Must* Have,” May 18, 2004, Florida Property & Casualty Claims Association 13th Annual Educational Conference, South Seas Resort, Captiva Island, FL.



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170. “When Bad Things Happen to Good Companies: Surviving Your Product Liability Crisis,” June 8, 2004, MedTech Insight Conference, The Palace Hotel , San Francisco, CA.
171. “The Seven Habits of Highly Effective Claim Professionals,” September 14, 2004, Annual Claims Conference, West Bend Mutual Insurance Company, West Bend, WI.
172. “Emerging Trends in Life Sciences Product Liability Claims,” September 22, 2004, Medmarc Broker Forum Executive Briefing, The Lodge at Torrey Pines, LaJolla, CA.
173. “Twenty-First Century Claims Management,” October 6, 2004, Pacific Claim Executives’ Association, The Westin Resort at Mission Hills, Rancho, Mirage, CA.
174. “Litigation Guidelines: Help or Hindrance?” (Moderator/Speaker), October 14, 2004, Annual Adjuster Conference & Expo, Hyatt Regency, Chicago, IL.
175. “Technology Trends in Litigation Management,” (Moderator/Speaker), October 15, 2004, Annual Adjuster Conference & Expo, Hyatt Regency, Chicago, IL.
176. “Speed Bumps on the Information Superhighway,” November 4, 2004, National League of Cities RISC Fall Workshop, The Loews Philadelphia Hotel, Philadelphia, PA.
177. “Dumb and Dumbest: Worst Practices in Insurance Coverage Processes,” January 25, 2005, Mealeys Advanced Insurance Coverage Conference, The Ritz Carlton, Philadelphia, PA.
178. “Life Science Litigation: What Executives Should Expect,” February 4, 2005, Medmarc Broker Forum, The Westin at Mission Hills, Rancho Mirage, CA.
179. “The Risk Manager’s Role During Trial,” March 16, 2005, Potomac/Washington D.C. RIMS Chapter, Holiday Inn, Rosslyn, VA.
180. “Building and Boosting Your Own Corporate Claims Policy,” March 23, 2005, 8th Annual P&C Claims Congress, The Hotel del Coronado, Coronado, CA.
181. “Boosting Your Corporate Immune System from Tort Viruses,” April 26, 2005, Florida Medical Manufacturers’ Consortium, Westshore Wyndham, Tampa, FL.
182. “Common Mistakes in Defending Medical Malpractice Claims And How to Avoid Them,” May 5, 2005, Crittenden Medical Insurance Conference, The Royal Sonesta Hotel, New Orleans, LA.
183. “On the Tightrope Without a Net: When Insurance Isn’t an Option,” May 5, 2005, Crittenden Medical Insurance Conference, The Royal Sonesta Hotel, New Orleans, LA.
184. “Risk Managing Clinical Trial Exposures,” May 6, 2005, Crittenden Medical Insurance Conference, The Royal Sonesta Hotel, New Orleans, LA.
185. “Making the Band: How to Win Friends and Influence the Claim Department,” May 20, 2005, Webcast sponsored by the National Association of Insurance Litigation Management.



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186. “Bracing for the Product Liability Storm: What Device Distributors Should Expect,” June 9, 2005, Independent Medical Distributors Association (IMDA) Management Conference, The Rancho Bernardo In, CA.
187. “Defense Counsel: The Value Proposition for Insurers,” June 17, 2005, 16th Annual Medmarc Defense Counsel Conference, The Fairmont Chateau de Frontenac, Quebec City, Canada.
188. “Hot Issues in Healthcare Liability,” September 14, 2005, Equipment Leasing Association Health Care Financing Conference, The Ritz Carlton Pentagon City, Arlington, VA.
189. “Extreme Claim Makeover: Best Practices in Workers Compensation Claims,” September 27, 2005, World Research Group Conference on Streamlining Workers Compensation Claim Processes, The Marriott Fisherman’s Wharf, San Francisco, CA.
190. “Flock of Eagles or Trop of Turkeys? Best Practices in Outside Counsel Selection,” Adjuster Conference & Expo, October 8, 2005, The Gaylord Palms Resort, Kissimmee, FL.
191. “Goodbye Gladiator – Hello Mediator: Successful Case Resolution Strategies,” October 8, 2005, Adjuster Conference & Expo, The Gaylord Palms Resort & Conference Center, Kissimmee, FL.
192. “Hot Issues in Medical Device Liability,” October 10, 2005, Med-Tech Insight Conference, The Westin Copley Place, Boston, MA.
193. “Calling Dr. Phil! A Relationship Rescue for Adjusters and Attorneys,” November 17, 2005, Webcast sponsored by the National Association of Insurance Litigation Management.
194. “Avoiding Punishment: An Adjuster’s View on Managing Punitive Damage Exposures,” February 3, 2006, Medmarc Insurance Annual Broker Meeting, The Caleo Resort & Spa, Scottsdale, AZ.
195. “Broker/Carrier Collaboration for Claims Excellence,” May 10, 2006, Marsh Life Sciences Telecast.
196. “Risk Management 101 for Clinical Urologists,” May 20, 2006, American Society of Clinical Urology, Downtown Hilton, Atlanta, GA.
197. “Defending Life Science Claims: The Bigger Picture,” June 16, 2006, Annual Medmarc Defense Counsel Meeting, The Silverado Resort, Napa, CA.
198. “The Seven Habits of Highly Effective Risk Management Systems,” June 22, 2006, OMTEC 2006, Rosemont Convention Center, Rosemont, IL.



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199. “Extreme Claim Makeover: Best Practices in Workers Compensation Claims for Occupational Medicine Specialists,” July 20, 2006, 26th Annual National Workers compensation and Occupational Medicine Conference, SEAK, Inc., Sheraton Four Points, Hyannis, MA.
200. “Trials and Tribulations: The Risk Manager’s Role During Litigation,” August 3, 2006, 31st Annual Florida RIMS Conference, The Ritz-Carlton, Naples, FL.
201. “Best Practice in Medical Device Risk Management,” September 26, 2006, Medical Product Outsourcing Conference, Hasbrouck Heights Hilton, The Meadowlands, NJ.
202. “How to Make Friends and Influence the Claim Department,” October 12, 2006, Segal McCambridge Singer & Mahoney Law Firm, Chicago, IL.
203. “Confessions of a Claims Adjuster: What Clients Look for in their Outside Counsel,” November 17, 2006, International Law Network, The Atlantis at Paradise Island, Bahamas.
204. “Current Trends in Life Science Liability,” January 29, 2007, Medmarc- AH&T Producer Forum, Chantilly, VA.
205. “A Stitch in Time,” February 9, 2007, Medmarc Broker Forum, Silverado Resort and Spa, Napa, CA.
206. “Current Trends in Life Science Product Liability,” February 9, 2007, Medmarc Broker Forum, Silverado Resort and Spa, Napa, CA.
207. “Taming the Email Beast,” February 23, 2007, P&C Claims Congress, The Hotel Santa Fe, Santa Fe, NM.
208. “Common Insurance Coverage Bloopers ... and How to Avoid Them,” March 27, 2007, Drug & Device Litigation Conference, International Quality & Productivity Center, Digital Sandbox Conference Center, New York, NY.
209. “Claims Confidential: An Adjuster’s Perspective on Coordinating Counsel,” March 27, 2007, Drug & Device Litigation Conference, International Quality & Productivity Center, Digital Sandbox Conference Center, New York, NY.
210. “Sorry Works... or Does it? New Approaches to Medical Malpractice Defense,” April 18, 2007, Crittenden Medical Insurance Conference, Omni Parker House, Boston, MA.
211. May 1, 2007, “An Adjuster's Perspective on National Coordinating Counsel,” Arnstein & Lehr Corporate Legal Executives Conference, South Beach Ritz Carlton, Miami, FL.
212. June 13, 2007, “The Seven Habits of Highly Effective Claim Professionals,” PLRB/LIRB Regional Meeting, The Richmond Marriott, Richmond, VA.
213. June 22, 2007, “Ten Signs that You Have a Challenging Claim,” Medmarc Annual Defense Counsel Meeting, The Broadmoor Resort, Colorado Springs, CO.



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214. July 17, 2006, "Six Best Practices in Medical Device Risk Management," Medical Device and Diagnostics Risk Management Summit, Center for Business Intelligence, The Doubletree Hotel, Washington, D.C.
215. September 27, 2007, "Best Practices in Medical Device Risk Management," AdvaMed Teleconference.
216. October 3, 2007, "Legal Issues in Medical Product Liability," (Panel Discussion), BIOMEDical Device Conference, McInerney Convention Center, San Jose, CA.
217. "How to Make Friends and Influence the Claim Department," October 28, 2007, Lorange & Thompson Partners Retreat, The Horseshow Bay Resort, Marble Falls, TX.
218. "The Seven Habits of Highly Effective CPCU's" November 8, 2007, DC Chapter of CPCU Conferment Dinner, Congressional Country Club, Potomac, MD.
219. March 8, 2008, "Confessions of an Insurance Control Freak: Ethical Issues in Claim Defense," Annual American Law Firm Association International Client Conference, The Ritz-Carlton, Key Biscayne, FL.
220. March 13, 2008, "Pillars of Effective Litigation Management" (Moderator), Council for Ethical Billing Conference, The Omni, Orlando, FL.
221. March 13, 2008 "Ethical Billing: Realistic or Oxymoron?" (Moderator), Council for Ethical Billing Conference, The Omni, Orlando, FL.
222. March 13, 2008, "Natural Born Billers," Council for Ethical Billing Conference, The Omni, Orlando, FL.
223. March 14, 2008, "Common Mistakes in Litigation Management" Council for Ethical Billing Conference, The Omni, Orlando, FL.
224. April 14, 2008, "The Circular Firing Squad: Defending Blended Medical Malpractice and Product Liability Claims," Annual Crittenden Medical Insurance Conference, The Loews Coronado Bay Resort, San Diego, CA.
225. June 11, 2008, "Streamlining Claims Litigation Management for Reduced Cost and Improved Outcomes," 12th Annual ACE Conference, Renaissance at SeaWorld, Orlando, FL.
226. July 16, 2008, "How to Win Friends and Influence The Claims Department," Workshop for Olson & Good Law Firm, Peris Industries, Falls Church, VA.
227. July 30, 2008, "Trials and Tribulations: The Risk Manager's Role in Litigation and Trial," 33rd Annual Florida RIMS Conference, The Ritz-Carlton, Naples, FL.
228. September 30, 2008, "Turbo-Charge Your Claim Negotiating!" Grinnell Mutual Reinsurance Company Annual Fall Claims Seminar, Des Moines Area Community College Polytechnic Center, Newton, IA.
229. October 1, 2008, "Common Claim Negotiating Mistakes ... and How to Avoid Them," Grinnell Mutual Reinsurance Company Annual Fall Claims Seminar, Grinnell, Iowa.



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230. October 16, 2008, “Time Management for Claim Professionals“ Tennessee Farm Bureau Insurance Company 57th Claims Conference, The Glenstone Lodge, Gatlinburg, TN.
231. November 12, 2008, “Medical Device Risk Management in a Post-*Riegel* World,” Medical Product Outsourcing Summit, The Conference Center at Waltham Woods, Waltham, MA.
232. March 20, 2009, “The Seven Habits of Highly Effective Insurance Professionals,” All Industry Capital-I Day, Hilton, Rockville, MD.
233. April 23, 2009, “Risk Managing Convergent Technologies,” BIOMEDevice Conference, Boston Conference & Exhibition Center, Boston, MA.
234. April 28, 2009, “The Seven Habits of Highly Effective Claim Professionals,” Mariposa Insurance Ltd. Carrier Certification Seminar, Airport Marriott, Orlando, FL.
235. “Coverage Botox for Liability Wrinkles: Risk Management Issues with Medi-Spas,” Crittenden Medical Insurance Conference, May 4, 2009, Grand Hyatt Tampa, Tampa, FL.
236. “How to Get More Business from Insurance Companies,” June 25, 2009, 18th Annual SEAK Expert Witness Conference, Hyannis Resort & Conference Center, Hyannis, MA.
237. “Insurance Coverage: Bad Medicine or Rx for Life Science e-Discovery Costs?” September 15, 2009, IQPC Drug and Device e-Discovery Conference, Hub City Center, Philadelphia, PA.
238. “What’s Up, Doc? Risk Management Issues in Marketing to Physicians,” September 23, 2009, PharmaMed Conference, The Wyndham Forrester Conference Center, Princeton, NJ.
239. “Hammer Time! Revisiting the Hammer Letter,” October 1, 2009, Crittenden Insurance Coverage Forum, Hyatt at Penn’s Landing, Philadelphia, PA.
240. “Common Product Liability Mistakes ... and How to Avoid Them,” October 13 and 14, 2009, Berkley Life Sciences Risk Management Webinars.
241. "Maximizing Your Insurance Coverage in the Bet Your Company Case" 12/9/09. ACI Drug and Device Litigation Conference, The Millennium Broadway, New York City.
242. “What’s Up, Doc? Avoiding Marketing Landmines” Berkley Life Sciences Webcast, March 3, 2010. (for Berkley Life Sciences clients and business partners).
243. “Odd Bedfellows: Defending the ‘Blended’ Medical Malpractice and Product Claim,” Crittenden Medical Insurance Conference, April 20, 2010, The Fairmont Princess, Scottsdale, AZ.
244. ”Using Old School Habits to Build New Age Claim Success,” 19th Annual WCCP/PCCP Management Conference and Leadership Retreat, June 8, 2010, The Hammock Beach Resort, Palm Coast, FL,



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245. “Risk Managing Your Clinical Trial Exposures” 46th Annual Drug Information Association Annual Conference, June 16, 2010, Walter Washington Convention Center, Washington, D.C.
246. “Best Practices in the New Litigation Environment,” 14th Annual ACE Conference, June 23, 2010, Bellagio, Las Vegas, NV.
247. “Reframing the Cost Challenge: How to Get Concierge Legal Services,” IQPC’s Corporate Litigation Exchange, July 20, 2010, Park Hyatt at Beaver Creek, Avon, CO.
248. “Hot Topics in Life Science Law and Litigation,” Berkley Life Sciences LLC Webinar, July 28, 2010, on-line.
249. “The Top Ten Things Life Science Companies Need to Know about e-Discovery,” Berkley Life Sciences LLC Webinar, August 18, 2010, on-line webcast.
250. “Insuring Your e-Discovery Success,” 5th Annual IQPC Drug, Device & Biotech eDiscovery Conference,” September 15, 2010, The Hub, CHF Center, Philadelphia, PA.
251. “Q: What Kind of Suit is always Expensive but Never in Fashion? A. A Lawsuit,” Life Science Alley, March 30, 2011, Hamline University, Minneapolis, MN.
252. “Winning Genes: Best Practices in Claims,” Foley & Lardner Life Science Conference, May 10, 2011, Genzyme Headquarters, Cambridge, MA.
253. “Building Your Claims Management Toolbox,” Wells Fargo Insurance Services Breakfast Briefing, June 16, 2011, The Hotel Sofitel, Redwood City, CA.
254. “Managing Risk and Liability from CGMP Noncompliance,” 47th Annual Drug Information Association Conference, June 20, 2011, McCormick Place Convention Center, Chicago, IL.
255. “Trials and Tribulations: The Risk Manager’s Role During Litigation and Trial,” 55th Annual Western Region RIMS Conference, October 5, 2011, The Golden Nugget, Las Vegas, NV.
256. “Leveraging Social Media to Boost Your Messaging Strategy,” CLM Advisors Webinar, March 21, 2012.
257. “Extreme Claims Makeover: Rx for Life Science Firms,” Council on Litigation Management Product Liability Mini-Conference, May 4, 2012, Marriott Marquis, Atlanta, GA.
258. “Confessions of a Claims Manager: Balanced Scorecards & Imbalanced Incentives,” Kentucky Justice Association Bad Faith Conference, May 15, 2012, Downtown Hilton, Lexington, KY.
259. “How to Win Friends and Influence the Claim Department,” Segal McCambridge Singer & Mahoney Law Firm, May 31, 2012, Chicago, IL.
260. “Managing the Risk of Clinical Trial Liabilities,” Cambridge Healthtech Institute Clinical Trial Oversight Summit, June 5, 2012, Omni Parker House, Boston, MA.



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261. "Adjuster Pay Schemes and Institutional Bad Faith," CLM – Claims and Litigation Management Alliance Webinar, June 6, 2012.
262. "Bearing Witness: Navigating the Bad Faith Minefield During Trial," Claims & Litigation Management Alliance Mini-Conference on Bad Faith and Insurance Coverage, Cambridge Boston Marriott, September 14, 2012.
263. "How to Win Friends and Influence the Claim Department," Carr Goodson LLP Law Firm Retreat, Nemacon Woodlands Resort, Farmingdale, PA, October 20, 2012.
264. "The Three Pillars of Effective Litigation Management," (webinar), Fireman's Fund Advanced Technical Seminar Series, October 23, 2012.
265. "What We Have Here is a Failure to Communicate: Bad Faith Issues in Adjuster-to-Insured Communication," CLM Coverage Bad Faith & Fraud Mini-Conference, Sheraton Downtown Orlando, January 25, 2013.
266. "Trials and Tribulations: What's the Risk Manager's Role in Litigation?" Society of Risk Management Consultants Annual Conference, Hyatt House, Charlotte, NC, October 17, 2013.
267. "Voices Crying in the Wilderness: Reconciling Attorney Ethics and Reduced Legal Fees," (panelist), February 21, 2014, American Bar Association TIPS Section Insurance Coverage Conference, The Arizona Biltmore, Phoenix, AZ.
268. "When Insurance, Coverage, Bad Faith and Fraud Collide," (panelist), February 29, 2014, Council on Litigation Management (CLM) (Bad Faith Mini-Conference, Hilton Atlanta Downtown Hotel, Atlanta, GA.
269. "To Split or Not to Split: Avoiding Bad Faith When Defense and Coverage Collide," (Panelist), April 10, 2014 CLM Annual Conference, The Boca Raton Resort, Boca Raton, FL.
270. "Reduce Legal Spend, Attract Clients and Avoid Bad Faith: You Can Have it All!" (Panelist), April 11, 2014, CLM Annual Conference, The Boca Raton Resort, Boca Raton, FL.
271. "Bulletproofing Your Investigation from Bad Faith Claims," CLM Webinar (panelist), June 11, 2014.
272. "Front-Line Customer Strategies to Defuse Product Liability Claims," CLM Product Liability Mini-Conference, Columbus Downtown Renaissance, June 13, 2014.
273. "How to Turbo-Charge Your Claims Productivity!" (Co-Presenter) Society of CPCU On-Line Webinar, September 3, 2014.
274. "So, You Want to be an Expert Witness?" (Panelist), Society of CPCU Webinar, January 9, 2015.



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275. "Avoiding and Mitigating Bad Faith: What Can Carriers Do to Better Prepare Themselves?" American Conference Institute's 30th Annual Forum on Bad Faith Claims and Litigation, (Panelist), March 16, 2012, The Union League, Philadelphia, PA.
276. "Preventing Bad Faith by Building a Continuing Education Culture," CLM - Claims and Litigation Management Alliance Webinar, May 13, 2015.
277. "Strategies for Bad Faith Prevention: Insurer Perspectives," American Conference Institute's 31st Bad Faith Claims and Litigation Conference, The Intercontinental, Chicago, IL, July 27, 2015.
278. "10 Common Mistakes in Retaining Experts ... and How to Avoid Them," Webinar co-sponsored by the Defense Research Institute and Thomson-Reuters Expert Witness Services, August 11, 2015.
279. "Preventing Bad Faith by Building a Continuing Education Culture," (speaker), Society of CPCU Webinar on line, October 15, 2015.
280. "Seven Deadly Sins of Reservation of Rights Letters" and "Bad Faith Pitfalls from Defense-Within-Limits Policies," American Conference Institute's 32nd Forum on Bad Faith Claims and Litigation, The Viceroy, Miami, November 19, 2015.
281. "10 Common Mistakes in Retaining Experts ... and How to Avoid Them," Webinar co-sponsored by the Defense Research Institute and Thomson-Reuters Expert Witness Services, December 8, 2015.
282. "Up in the Air: The Impact of Drone Technology on Liability Claims," Podcast interview with *The Claims Journal*, May 23, 2016.
283. "Not Your Father's Claim File, With Sticky Notes and Coffee Stains: Claim Files in the Digital Age," American Conference Institute (ACI) Extracontractual Liability and Bad Faith Conference, June 3, 2016, The Carlton Hotel, New York City.
284. "Implementing Claims Best Practices Requires Careful Thought," Podcast interview with *Claims Journal*, August 2016.
285. "10 Habits of Highly Effective Coverage Adjusters," (co-presenter), Society of Chartered Property & Casualty Underwriters (CPCU) webinar, November 16, 2016.
286. "How will Autonomous Vehicles Disrupt the Insurance Claim Industry?" Podcast Interview with *Claims Journal*, March 1, 2017, <http://www.claimsjournal.com/news/national/2017/03/02/277180.htm>
287. "Seven Habits of Highly Effective Coverage Adjusters," Podcast Interview with THE CLAIMS JOURNAL, published June 9, 2017, <http://www.claimsjournal.com/news/national/2017/06/08/278751.htm>
288. "[A Contrarian View of Claim File Documentation](#)" Podcast interview with THE CLAIMS JOURNAL, published August 28, 2017. <http://www.insurancejournal.tv/videos/15514/>



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289. “Conflicts of Interest and Independent Counsel,” (co-presenter), Webinar produced by the Claims and Litigation Management Alliance (CLM), November 8, 2017.
290. “Future Challenges and Opportunities in the Claims Arena,” Interviewed by Chris Mandell of The Sedgwick Institute, published as podcast on December 14, 2017, <http://www.sedgwickinstitute.com/si-live>
291. “How Claim Managers Can Make 2018 Their Best Year Ever!” Podcast Interview with THE CLAIMS JOURNAL, posted December 29, 2017, <https://www.claimsjournal.com/news/national/2017/12/29/282279.htm>
292. “Six Tips for Navigating the Independent Counsel Minefield,” Podcast Interview with THE CLAIMS JOURNAL, posted March 12, 2018, <https://www.claimsjournal.com/news/national/2018/03/12/283520.htm>
293. “Vetting the Case: Nine Questions to Ask BEFORE Accepting That New Expert Witness Assignment,” Annual Conference of the American Association of Insurance Management Consultants, The Ashton Hotel, Fort Worth, Texas, April 26, 2018.
294. “What to Look for When Shopping for Quality Claim Service,” Podcast Interview with THE CLAIMS JOURNAL, published June 15, 2018, <https://www.claimsjournal.com/news/national/2018/06/14/285205.htm>
295. “Liability Claims Impact from Virtual Reality Technology,” Podcast Interview with THE CLAIMS JOURNAL, published September 25, 2018, <https://www.insurancejournal.tv/videos/16955/>
296. “Ten Habits of Highly Effective Adjusters: Analyzing Coverage,” CPCU Annual Conference, October 16, 2018, The Manchester Grand Hyatt, San Diego, CA.
297. “Bulls-Eye on the Adjuster: Keodalah and Adjuster Bad Faith,” Podcast Interview with THE CLAIMS JOURNAL, published December 31, 2018, <https://www.insurancejournal.tv/videos/17415/>
298. “How to Train Insurance Coverage Without Putting People to Sleep,” video webinar sponsored by the Society for Insurance Trainers and Educators (SITE), March 14, 2019.
299. “Lights, Camera, Action and ... Testimony! Acing Your Expert Deposition,” May 3, 2019, Annual Conference of the American Society of Insurance Management Consultants, The Hilton Garden Inn, Charleston, SC.
300. “Self-Insured Retentions and Claims: Opportunity or Pitfall?” Webinar co-presenter, sponsored by the Society of Chartered Property & Casualty Underwriters (CPCU), July 16, 2019.
301. “Perspectives on Liability Claims Adjusting,” (Zoom), Katie School of Insurance and Risk Management, Illinois State University, November 11, 2020.



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302. “Dollars and Sense: 20 Tips to Get Paid for Consulting Work,” October 23, 2021, Annual Conference of the American Association of Insurance Management Consultants, The Hotel Republic, San Diego, CA.
303. “AAIMCo’s Vision and Future,” May 5, 2022, The Higgins Hotel and Conference Center, New Orleans, LA.