

29th Annual

A Day of Growth for Insurance and Financial Service Professionals

zarks

Friday, October 10, 2008 (7:30am-4:00pm)

Oasis Convention Center
2546 North Glenstone, Springfield, MO

- *Network with Industry Colleagues*
- *CE Credits*
- *Professional Panel*
- *Concurrent Sessions on the Latest Issues*
- *Luncheon*



Nancy Friedman, the Telephone Doctor®

A meeting planner's dream! **Nancy Friedman** is a gifted motivational speaker with a proven track record. A two-time Million Dollar Round Table speaker, Nancy's quick wit and sharp humor make her a big hit with association audiences as well as corporate meeting event attendees. As a noted expert on customer service, she's appeared on Oprah, The Today Show, Good Morning America, Fox News, CNN, CBS This Morning and has been featured in the Wall Street Journal and USA Today. With these credentials, it's no wonder major corporations and associations around the world choose Nancy Friedman to speak at their events.

Nancy is internationally recognized as a leading authority on customer service and communication skills. She is the author of five best selling books and the featured spokesperson in the popular Telephone Doctor DVD library series. She specializes in giving "how to" techniques based on real world experience...techniques she has shared with companies world wide to increase service skills and gain a competitive edge.



Cliff Wilson

Cliff F. Wilson, CLU, ChFC, LUTCF, is the President-Elect of NAIFA National. Wilson, a 35-year industry veteran, is president of Southeast Arizona Insurance Services, Ltd, a multi-line General Agency for the American National Companies located in Chandler, Arizona. The agency provides Insurance and related Financial Services to Businesses and Families.

Elected in 2002, Wilson has served as Trustee liaison to the Positioning/Communication Committee, Government Relations Committee, Associations Committee, and Membership Committee. In addition to serving on many NAIFA Committees and Task Forces, Wilson has served as Chair of the Membership Committee and Associations Committee. He is a past President of NAIFA Arizona, past Trustee of LUTC, past Board Member of The American College, LILI Graduate, IFAPAC Emissary and was inducted into the NAIFA Arizona Hall of Fame in 2000. Wilson was elected NAIFA Secretary in 2006 at the 117th Convention in San Francisco.

AGENDA

7:30-8:00 a.m. **Registration – Convention Center**

Continental Breakfast

8:00-8:45 a.m. **Kickoff Presentation**

Nancy the Telephone Doctor®

Sponsored by: ANPAC

9:00-9:50 a.m. **General Session- Two Options**

Professional Panel- General Public

Patrick Platter, Moderator

Matt Barton, Missouri Dept. of Insurance

Jay Wasson, Missouri State Representative

Dan Clemens, Missouri State Senator

Larry Case, MAIA

Young Professionals- Student Panel

Stan Adamson, MSU, Moderator

Brian Dixon, Dixon Insurance

Lance Smith, PJC

Claire Mead, ANPAC

10:00-11:50 a.m. **Workshop Session 1**

A. 7 Keys to a Customer Service Culture

B1. **Ethics** (10-10:50 am)

B2. **Suitability** (11-11:50 am)

C1. **Cyber Risks** (10-10:50 am)

C2. **Missouri Law** (11-11:50am)

12:00-1:30 p.m. **Luncheon Buffet- Atrium**

Featured Speaker, *Cliff Wilson*

Awards and Recognitions

1:30-1:50 p.m. **Networking**

In the Vendor Area

1:45- Drawing for Prizes & **GRAND PRIZE**

2:00-3:50 p.m. **Workshop Session 2**

A. Settlement Demand and Settlement Issues

B1. **Ethics** (2-2:50 pm)

B2. **Suitability** (3-3:50 pm)

C1. **Pandemic Planning** (2-2:50 pm)

C2. **Missouri Law** (3-3:50pm)

Professional Panel 9:00 to 9:50 a.m.



Patrick Platter, Moderator

Patrick J. Platter is an attorney with the Law Firm of Neale & Newman, L.L.P. in Springfield, Missouri. His focus is on work related injury litigation, administrative law, and general trial practice. He is the author of the 'History, Administration and Jurisdiction of the Worker's Compensation Law' for the Missouri Bar desk book series.



Matt Barton, Licensing Manager, MO Dept. of Insurance, Financial Institutions & Professional Registration

Matt Barton manages the office for licensing of insurance producers, public adjusters, and bail bond agents, and has been in this department for four years. He is active in the department's legislative process, assisting in drafting legislation and reviewing bills that would affect the department and providing responses to pending bills. Matt led the department's communications duties and previously served as the Licensing Manager in the Missouri Securities Division within the Secretary of State's office.



Jay Wasson, Missouri State Representative District 141

Representative Jay Wasson represents part of Christian, Lawrence and Stone counties (District 141) in the Missouri House of Representatives. He was elected to the House in November 2002. In addition to his legislative duties, Rep. Wasson is in real estate development. He also served as mayor of Nixa from 1997 to 2002. A charter member of the Nixa Chamber of Commerce, he is a board member of the Community Foundation and of the Ozarks Branch Chapter of the Multiple Sclerosis Society.



Dan Clemens, Missouri State Senator, 20th District

State Senator Dan Clemens represents Christian, Douglas, Webster and parts of Greene County in the Missouri Senate. Sen. Clemens owns and operates a 3rd generation family 400 acre farm. He is chair of the Agriculture, Conservation, Parks and Natural Resources committee. He is also member of the following committees: Pension, Veterans' Affairs and General Laws committee; Seniors, Families and Public Health committee; Small Business, Insurance and Industrial Relations committee; and Joint Committee on the Life Sciences.



Larry Case, Executive Vice President, Missouri Association of Insurance Agents (MAIA)

Larry Case has been Executive VP for MAIA (largest insurance agents' association in MO) since 1999. Before joining MAIA in 1992, Case was executive VP of the MO Association of Professional Insurance Agent. He also worked in the insurance industry as a commercial lines marketing representative for seven years, and spent seven years in state government, with the Missouri Department of Agriculture and Department of Economic Development.

*Spfd Chapter of the Nat'l Assoc. of Health Underwriters
Springfield Assoc. of Insurance and Financial Advisors
Insurance Association of the Ozark
CPCU Society, Ozarks Chapter
Gresham & Associates
Mercy Health Plans
Commerce Bank
Cartridge World
Wolters Kluwer*

Sponsors

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M.J. Kelly
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*American National Property And Casualty Co.
Risk and Insurance Management Society (RIMS)
Missouri Employers Mutual Insurance Company
Baker Chair of Insurance, Missouri State Univ.
Missouri Insurance Education Fund
Springfield Business Journal
Great Southern Insurance
Wickizer & Clutter Inc.
Shelter Insurance*

WORKSHOP SESSION 10:00 – 11:50 am

A. Getting the Right Attitude: The 7 Keys to a Customer Service Culture

Presented by: *Nancy Friedman*

Everyone knows that fostering a positive mental attitude is critical to developing a customer service culture. But how many people know exactly what brings about that positive mental attitude? What specifically are the keys? Take this course to find out.

B1. Ethics (10:00 am – 10:50 am)

Presented by: *Ed Wells* 1 Hour MO Ethics/CE (Pending)

This course will provide discussion and understanding of Ethics in the Property and Casualty Industry. Topics to be discussed include Ethical Values, Ethical Dilemmas, and why we have Ethical Lapses.

B2. Suitability (11:00 am – 11:50 am)

Presented by: *Ed Wells* 1 Hour MO Ethics/CE (Pending)

This course is designed to meet the specific ethics requirements for the state of Missouri regarding suitability.

C1. Cyber Risks (10:00 am – 10:50 am)

Presented by: *Emily Freeman* 1 Hour General CE (Pending)

Develop your expertise on the ever-changing world of people, processes, technology and laws as they pertain to outsourcing through Emily Freeman's presentation exploring the risks your company may be facing.

C2. Missouri Law (11:00 am – 11:50 am)

Presented by: *Ron Wheeler* 1 Hour MO Ethics/CE (Pending)

This course is designed to meet the specific ethics requirements for the state of Missouri. It covers the ethical beginnings and various ethical pronouncements and rulings, as well as Missouri specific laws, regulations and case studies.

WORKSHOP SESSION 2:00 – 3:50 pm

A. Settlement Demand and Settlement Issue

Presented by: *Laurel Stevenson* 2 Hour General CE
Sponsored by: Wolters Kluwer

This seminar will address statutory changes in pre-judgment interest demands, developments regarding fiduciary duties between carriers and insureds, dealing with multiple claimant situations and insufficient coverage, communications with insureds and third-parties, appropriate claims investigation and evaluations, early assessment, and avoiding bad faith.

B1. Ethics (2:00 pm – 2:50 pm)

Presented by: *Ed Wells* 1 Hour MO Ethics/CE (Pending)

This course will provide discussion and understanding of Ethics in the Property and Casualty Industry. Topics to be discussed include Ethical Values, Ethical Dilemmas, and why we have Ethical Lapses.

B2. Suitability (3:00 pm – 3:50 pm)

Presented by: *Ed Wells* 1 Hour MO Ethics/CE (Pending)

This course is designed to meet the specific ethics requirements for the state of Missouri regarding suitability.

C1. Pandemic Planning (2:00 pm – 2:50 pm)

Presented by: *Rick Shanks* 1 Hour General CE (Pending)

Understand how a pandemic threatens your organization and how to develop effective continuity and contingency plans.

C2. Missouri Law (3:00 pm – 3:50 pm)

Presented by: *Ron Wheeler* 1 Hour MO Ethics/CE (Pending)

This course is designed to meet the specific ethics requirements for the state of Missouri. It covers the ethical beginnings and various ethical pronouncements and rulings, as well as Missouri specific laws, regulations and case studies.

***NOTE: ALL PROGRAMS SUBJECT TO CHANGE**

WORKSHOP LEADERS

Emily Freeman

Emily Q. Freeman is Executive Director for Technology and Media Risks for Lockton International and Specialty Brokering Services in London. She has been a principal drafter of cyberspace and technology insurance products. She has also been a senior consultant for risk analysis of operational risk and applications utilizing computer networks and the Internet. Freeman has a brokerage background in London and the United States, as well as an underwriting background. She has been responsible for large insurance and risk management programs, and served as a technical advisor on coverage and underwriting matters. She was Vice President at National Union/AIG involved with underwriting and management of technology/ cyber risks.

Rick Shanks

Rick Shanks is the National Managing Director for Aon's Food System, Agribusiness & Beverage Group (FAB). His broad-based business background spans ten years with AT&T and Western Electric Manufacturing Company in which he gained valuable experience and leadership skills within the companies' manufacturing, finance, construction, and distribution disciplines. Shanks provides industry-specific experience with an emphasis on risk identification, assessment and developing solutions for non-traditional risks such as food contamination events, bioterrorism, brand damage, supply system disruption, volumetric loss to crop/livestock, commodity price and other high-impact financial volatility risk exposures of a global food system.

Laurel Stevenson

Partner with the law firm of Lathrop and Gage LC, Laurel is based in Springfield, MO and she practices throughout Missouri in the areas of products, premises, and trucking liability, personal injury, wrongful death, and UM/UIM. She is licensed in Missouri, Iowa and Wisconsin. She serves as counsel for a third-party administrator, providing liability and coverage opinions on cases in eight states. She is a graduate of the University of Missouri School of Law and conducts programs on proper claims handling, bad faith litigation and premises and trucking liability.

Ed Wells

Ed Wells, CPCU, is the Sr. Insurance Operations Training Consultant for America First Insurance Company in Richardson, Texas. Wells delivers Continuing Education/Career Development training for licensed agents in the AFI territory that includes Texas, Louisiana, Arkansas, Oklahoma, Kansas and Missouri. Previously, Wells was the Sr. Systems and Procedures Specialist at Texas Farm Bureau in Waco, Texas for 18 years. At TFB, Wells was an Underwriter and Underwriting Supervisor. He is the Director of the Dallas Chapter of CPCU.

Ron Wheeler

Ron Wheeler, LUTCF, is President of MKI, a brokerage operation that markets annuities and insurance through financial institutions that is projected to do \$100,000,000 in annuity premium in 2008. Wheeler has been in the Insurance Business for 28 years and has been Past President of Harry S. Truman NAIFA and Missouri NAIFA. He was also Past Co-Chair Financial Institution Task Force for NAIFA. Wheeler currently serves on the Advisory Board of the Missouri Department of Insurance, Financial Institutions and Professional Registration.

29th Annual

Ozarks I-Day Committee

P. O. Box 4841

Springfield, MO 65808-4841

Ozarks
I day
2008

Your Name: _____

Professional Designation(s) (or Student): _____

Address: _____

Employer/Company: _____

E-mail Address (for confirmation): _____

Business Phone Number: _____

Professional Organization(s) of which you are a member: _____

Please let us know if you have any special needs: _____

**Hotel
Oasis Inn**

*2546 N. Glenstone
Springfield, MO 65804
(417) 866-5253*

Mention Group Name **I-Day**

\$72.00 + tax
single/double

**Circle the programs below you are most interested in attending.
Circle either a two-hour session or a combination of two one-hour sessions.**

General Session (9:00- 9:50am)

Professional Panel
Young Professionals Panel

Workshop Session 1 (10:00-11:50am)

A. 7 Keys to a Customer Service Culture
B1. Ethics (10-10:50am)
B2. Suitability (11-11:50am)
C1. Cyber Risks (10-10:50am)
C2. Missouri Law (11-11:50am)

Workshop Session 2 (2:00-3:50pm)

A. Laurel Stevenson- Settlement Demands
B1. Ethics (2-2:50pm)
B2. Suitability (3-3:50pm)
C1. Pandemic Planning (2-2:50pm)
C2. Missouri Law (3-3:50pm)

WHAT DO YOU WANT TO HEAR?

* List the topic(s) or question(s) you would like the Professional Panel to cover:

1.
2.
3.

www.ozarksinsuranceday.com

Questions? Call (417) 725-3808 and ask for:
David Haymes or email: david@haymesinsurance.com

Registration Fee

Early registration, per person (postmarked prior to October 1st) \$ 65
Regular registration, per person (postmarked after October 1st) \$ 75

Make check payable to **Ozarks I-Day**
Total Enclosed \$ _____

Mail check and registration form to:

Ozarks I-Day
P. O. Box 4841
Springfield, MO 65808-4841