

IIABW & PIA WA/AK  
Joint Conference  
1410 Main St.  
Vancouver, WA 98660  
www.waconference.com



Title Sponsors

**ATTENTION AGENTS:** Visit every exhibit booth and complete an exhibitor punchcard to be entered to win **\$300 CASH!**  
All **agents** registered for a full conference package will be entered to win the agent grand prize of **\$500 CASH!**

## Look Who's Coming!

- |  |   |   |
|--|---|---|
| <p><b>29:11 Insurance Services</b><br/>AFCO Insurance Premium Finance<br/>All Risks Limited<br/>American Modern Insurance<br/>AmTrust North America<br/>Applied Systems<br/>Arrowhead General Insurance Agency<br/>Bank Direct Capital Financing<br/>Burns &amp; Wilcox<br/>Canfield<br/>Capital Insurance Group<br/>Capital Premium Financing<br/>Care Providers Insurance<br/>CCTV Camera Scan<br/>Chubb Group of Insurance Companies<br/>Combined Insurance<br/>Connexion Insurance Solutions<br/>Deans &amp; Homer<br/>Distinguished Programs<br/>Encompass Insurance<br/>Evergreen Insurance Managers<br/>First American Property &amp; Casualty Ins.</p> | <p><b>Frontier Bonding Services</b><br/>Grange Insurance Association<br/>Great Northwest Insurance Company<br/>Griffin Underwriting<br/>Hagerty Insurance<br/>Hawkssoft, Inc.<br/>IBQ Systems<br/>IIABW/IPSC<br/>Imperial PFS<br/>Indemnity Excess &amp; Surplus Agency<br/>Kemper Personal &amp; Commercial Lines<br/>Liberty Mutual Insurance Company<br/>Mapfre Insurance<br/>Markel Specialty<br/>Multico Rating Systems<br/>Mutual of Enumclaw<br/>National General<br/>NIF Pacific<br/>NW Preferred Federal Credit Union<br/>Oregon Mutual Insurance Company<br/>Pacific Coast E&amp;S Insurance Services</p> | <p><b>Paul Davis Restoration</b><br/>PIA Western Alliance<br/>Pemco Mutual Insurance Company<br/>Prime Insurance Company<br/>Progressive Insurance<br/>Red Shield Insurance Company<br/>RIC General Insurance Agency<br/>Risk Placement Services<br/>Safeco Insurance Company<br/>Selective Flood Insurance<br/>Servpro of Central Seattle<br/>Stillwater Insurance<br/>Superior Underwriters<br/>Travelers<br/>Trustco<br/>UCA General Insurance Services<br/>Vertafore<br/>Washington Fair Plan<br/>Washington Surveying &amp; Rating Bureau<br/>Western Experts in Transportation<br/>Western National Insurance Group</p> |
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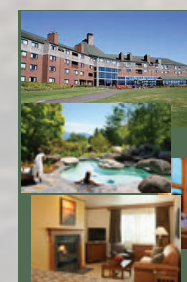
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## Thursday, October 2, 2014

- 8:00 am - 7:00 pm Registration Open
- 8:30 am - 1:30 pm Golf Tournament
- 8:30 am - 11:30 am Insurance Hot Topics Part 1, *Jerry Kennedy, CIC, Foisy & Kennedy, Inc.* 3 CE WA/OR
- 11:30 am - 12:30 pm Group Lunch
- 12:30 pm - 2:30 pm Insurance Hot Topics Part 2, *Jerry Kennedy, CIC, Foisy & Kennedy, Inc.* 2 CE WA/OR
- 2:45 pm - 3:30 pm IIABW Business Meeting
- 2:45 pm - 3:30 pm PIA Business Meeting
- 3:30 pm - 5:00 pm General Session  
IIABW & PIA Presidents Welcome Remarks  
Insurance Company Executive Panel
- 5:30 pm - 6:30 pm Reception
- 6:30 pm Awards Dinner
- 9:00 pm Hospitality Suite

## Friday, October 3, 2014

- 7:00 am - 5:30 pm Registration Open
- 9:00 am - 1:00 pm Trade Show / Brunch  
Concurrent Sessions A & B: *Choose from the following*
- 1:00 pm - 4:00 pm Session A - *"Do Today's Customers Find You Attractive?"*  
*Gabriel Gonzalez, Safeco Insurance No CE*
- 1:00 pm - 2:00 pm Session B - *"Financial Examinations by the Insurance Commissioner's Office"*  
*Mary Tunis, CPA, CFE, Office of Insurance Commissioner 1 CE WA*
- 2:00 pm - 4:00 pm Session B - *"E&O Trends for Insurance Agents - 2014 Update"*  
*Thomas Stratton, Esq., Rocky Stratton, 2 CE WA/OR*
- 5:30 pm - 8:00 pm Columbia River Gorge Sternwheeler Dinner Cruise
- 8:45 pm Hospitality Suite  
*Program may be subject to change.*



## Hotel Reservations

**Skamania Lodge** is nestled in the foothills of the Columbia River Gorge National Scenic Area and combines classic charm of a Cascadian vstyle lodge with the most modern technology, amenities and recreational choices.

**Reservations** can be made by calling 800-221-7117 and are not included in conference registration fees. Reference WA Joint Conference Group Discount Code 1XK6BF for discounted rates beginning at \$155 per night, plus applicable taxes and resort fees. Rooms are held until September 4, 2014 and subject to availability.

## Sternwheeler Columbia Gorge



Join us on Friday evening at Cascade Locks Marine Park in Cascade Locks Oregon - just 15 minutes from Skamania Lodge for dinner and cruising through the heart of the Columbia River Gorge.

Learn about the gorge formation, landmarks and natural wonders as we dine on sumptuous northwest cuisine. Cruise leaves promptly at 6PM.

Schedule of Events



## Thursday Sessions

**Jerry Kennedy, CIC** owns and manages Foisy & Kennedy, Inc. in Grand Coulee, Washington and currently serves as National Faculty for the Society of Certified Insurance Counselors and is CIC Education Consultant for the National Alliance for the state of Nevada.

**8:30 AM - 11:30 AM: Insurance Hot Topics - Part 1 - 3 CE WA/OR**

This program reviews coverages for: domestic partners, drop down auto liability limits, new liability exclusions for business use of autos, car electronics, custom equipment limitations, car rental coverage, ride sharing exclusions, coverage for neighborhood electric vehicles.

**12:30 PM - 2:30 PM: Insurance Hot Topics - Part 2 - 2 CE WA/OR**

This program reviews coverages for: social host and social media liability, coverage for vacation rental and AirBnB, Trust and LLC ownership coverage challenges, coverage reasons to sell an HO-5, liability gaps personal umbrellas can fill.

**3:30 PM - 5:00 PM: Insurance Company Executive Panel**

Get a pulse of what's happening in the industry and what companies are doing to better prepare themselves for the trends ahead.

**Guest Panelists:** Eric Nelson, President & CEO of Mutual of Enumclaw • Brian Steffel, President & CEO of Oregon Mutual Insurance • Becky Fann, CPCU, Vice President NW Region General Manger of Safeco Insurance • Carrie Cheshier, CPCU, CIC, ARM, Regional President of Travelers Northwest Region

## Friday Sessions (choose one)

**Workshop A: 1 PM - 4 PM: Do Today's Customers Find You Attractive?**



**Gabriel Gonzalez, CIC** is the Marketing Director Northwest Region for Safeco Insurance. With 16 years' experience at Safeco, he trains independent agents in the importance of marketing and the need to change to meet customer expectations.

This presentation explores how the "digital" world has influenced consumer purchasing habits and expectations for service. We will discuss the impact to the independent agent and steps to position your agency marketing to create loyal customers.

**Workshop B 1 PM - 2 PM: Financial Examinations by the Insurance Commissioner's Office - 1 CE WA**



**Mary Tunis, CPA, CFE** is a Financial Examiner at the Office of the Insurance Commissioner. She has been licensed as a CPA for over 30 years and as a certified fraud examiner for over 10 years.

This workshop will demystify the Office of the Insurance Commissioner's financial examination process and let agencies know what to expect when they are selected for a financial exam. Workshop topics include the examination process and outcomes, laws and issues of concern -common findings.

**Workshop B 2 PM - 4 PM: Emerging E&O Trends for Insurance Agents - 2014 Update 2 CE WA/OR**

**Tom Stratton, Esq.**, is a shareholder of Rockey Stratton, PS who focuses on the defense of claims against insurance agents in Washington, Alaska and Idaho, and emphasizes ways to avoid liability claims and reduce litigation risk in general.



This workshop will provide a synopsis of recent E & O claims against insurance agents and brokers and offers suggestions on how to avoid such claims in the future. The seminar also provides a basic outline of an agent's duties as well as an update of Washington court decisions involving agents.

For further information please visit [www.waconference.com](http://www.waconference.com)



Please complete a separate registration form for EACH additional person (except Spouse/Guest)  
You can also register online at [www.waconference.com](http://www.waconference.com)

## CONFERENCE REGISTRATION

I am:  Agent  Company Representative

Name & Designation(s): \_\_\_\_\_ Badge Name: \_\_\_\_\_

Spouse/Guest Name (if registering): \_\_\_\_\_ Badge Name: \_\_\_\_\_

Check if you need WA **or** OR CE and will be attending classes WA OIC# \_\_\_\_\_ OR IC# \_\_\_\_\_

Agency/Company: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

## Full Registration Packages

(Includes all conference sessions Thursday and Friday, all meal functions, Trade Show and dinner cruise) DOES NOT INCLUDE GOLF

IIABW or PIA Member	<input type="radio"/> \$325
Non-Member	<input type="radio"/> \$365
Additional Staff from same agency	<input type="radio"/> \$285
Young Agent/First Time Attendee (AGENTS ONLY)	<input type="radio"/> \$250
Spouse/Guest	<input type="radio"/> \$250

## Ala Carte Options

### Thursday

Entire Day (All Sessions, Lunch and Awards Dinner)	<input type="radio"/> \$199
AM CE Session	<input type="radio"/> \$ 39
Group Lunch	<input type="radio"/> \$ 45
PM CE Session	<input type="radio"/> \$ 29
General Session (Company Panel)	<input type="radio"/> <b>FREE</b>
Awards Dinner Only	<input type="radio"/> \$ 99

### Friday

Entire Day (All sessions, Trade Show and Dinner Cruise)	<input type="radio"/> \$150
Trade Show Only (Includes Brunch)	<input type="radio"/> \$ 50
PM Concurrent Session (attend only one)	<input type="radio"/> \$ 39
Friday Dinner Cruise Only	<input type="radio"/> \$ 70

## Golf Tournament

\$130

Golf registration is not included in any of the above conference packages. This year's event is held at the Skamania Lodge Golf Course and includes 18 holes of golf, power cart, one 3-ball sleeve logo balls, bottled water and 1 drink and hot dog ticket. Every accommodation will be made to pair you with foursome request and is subject to change as necessary to fulfill the appropriate foursome slots.

Foursome Request: \_\_\_\_\_

## Payment Information

Method of payment:  Check payable to PIA  VISA  MC  AMEX  Discover **Total Due:** \_\_\_\_\_

Name (as it appears on card): \_\_\_\_\_

CC #: \_\_\_\_\_ Exp: \_\_\_\_\_ Sec#: \_\_\_\_\_

Credit Card billing address: \_\_\_\_\_

Signature: \_\_\_\_\_

**Hotel Reservations:** Are not included in registration fees and may be made by calling Skamania Lodge Reservation Department directly at 800-221-7117. Reference WA Joint Conference Group Discount Code 1XK6BF for discounted rates beginning at \$155 per night, plus applicable taxes and resort fees. Rooms are held until September 4, 2014 and subject to availability.

**Cancellation Policy:** Cancellation requests for ALL PACKAGES (EXCEPT GOLF) received at PIA OR IIABW headquarters by 5:00 p.m. September 4, 2014 are fully refundable less a 15% service charge. Sorry no refunds after September 4, 2014. Golf registration fees are non-refundable once registered. Payment for all registrations are due at time of reservation.

IIABW 11911 NE 1st St., Ste B103 Bellevue, WA 98005 t. 425-649-0102 f. 425-649-8573 e. [sscott@wainsurance.org](mailto:sscott@wainsurance.org)  
PIA 3205 NE 78th Street, #104, Vancouver, WA 98665 t. 888-246-4466 f. 360-571-7600 e. [kimlegato@piawest.com](mailto:kimlegato@piawest.com)

[WWW.WACONFERENCE.COM](http://WWW.WACONFERENCE.COM)