

## **2016 Combined Claims Conference Program**

**March 8-9, 2016  
Hyatt Regency Orange County  
11999 Harbor Blvd.  
Garden Grove, CA 92840**

### **Program of Events:**

#### **Monday, March 7, 2016**

2:00 p.m. - 9:00 p.m.

##### ***CCC Exhibitor Setup***

Grand Ballroom

2:00 p.m. - 9:00 p.m.

##### ***Registration Desk Open***

Grand Ballroom Foyer

#### **Tuesday, March 8, 2016**

7:00 a.m. - 4:30 p.m.

##### ***Registration Desk Open***

Grand Ballroom Foyer

7:00 a.m. - 7:30 a.m.

##### ***Exhibitor Breakfast and Set-up***

Grand Ballroom

Exhibitors with Badges only allowed in the Exhibit Hall at this time

7:30 a.m. - 9:00 a.m.

##### ***Continental Breakfast in the Exhibit Hall for all Attendees***

Grand Ballroom

7:30 a.m. - 4:30 p.m.

##### ***Exhibit Hall Open to All Attendees***

Grand Ballroom

9:00 a.m. - 10:00 a.m.

##### ***Opening General Session***

##### ***Uber, Lyft, Airbnb, Home-Away; Insurance and the Sharing Economy***

Royal Ballroom

##### ***Session Description:***

The Opening General session will provide a forum for claims professionals to discuss the new laws and challenges of the ride sharing and home sharing claims. It will introduce adjusters to transportation and lodging networks and how they are innovating travel. The course will also review Public Utilities Code Sections 5430 – 5433 and other legislation which impacts the sharing economy and the claims that arise from the sharing networks. The attendees will gain a better understanding of California Assembly



Bill 2293, effective July 1, 2015, outlining the transportation network company requirements for coverage, their duty to defend and cooperate with personal auto insurers in coverage investigations.

**Speakers:**

Shawn-Ellen Reeves, Auto Club of Southern California  
Jim Abeltin, Attorney, Abeltin & Migoya

10:00 a.m. - 10:45 a.m.

**Morning Break in Exhibit Hall**

Grand Ballroom

**10:45 a.m. - 11:45 a.m.: BREAKOUT SESSIONS**

***Preserving the Evidence or Lose the Claim***

Royal Ballroom E - F

**Track:** Property

**Session Description:**

This session will provide the attendees with a better understanding of how to investigate and analyze Commercial and Personal Lines Property subrogation claims. It will teach how to effectively pursue negligent third parties to maximize their subrogation recovery. In addition, it will demonstrate how to protect the interests of their insureds during the claims handling process and through the subrogation process.

**Speakers:**

Hugh Black, Forensic Expert, Witness/Consultant  
Robert von Esch IV, Principal, Von Esch Law Group

***Major Claims and Recognizing Dangerous Conditions of Public Property***

Garden 1 - 3

**Track:** Liability

**Session Description:**

This session will discuss and analyze major claims from the perspective of an attorney and an adjuster with years of experience in handling major litigation matters, including, construction accidents, wrongful death, product liability and public entity claims. In addition attendees will gain a better understanding of what constitutes a dangerous condition of a public property as it relates to California Government Code Section 835.

**Speakers:**

Kristi Dean, Managing Partner, Stone Dean LLP  
Dwight Kunz, Assistant Vice President/Account Executive, Carl Warren & Company

***The Effects & Ethical Use of Social Media Content in Insurance Fraud Investigations***

Plaza Terrace

**Track:** SIU

**Session Description:**

The rise of social media and its ever-increasing usage has created a new source of information that is applicable across a number of different industries and business needs. With over one billion individuals using social media worldwide, the amount of content generated every minute on the internet is extraordinary. Whether it's identifying a fraudulent disability claim or recovering a stolen item, utilizing social media is imperative to ensure your claims case has the most up to date information available. To understand a subject's online foot print, you first must know the latest trends in the Social Media Revolution.

**Speakers:**

Robert Hughey, Assistant Vice President, Veracity Research Investigations  
Dave Stacey, Unit Manager, USAA

**Emerging Issues in Electronic Discovery**

Garden 4

**Track:** Workers' Compensation

**Session Description:**

What is new technology bringing to the workers' compensation discovery process? Learn the pros and cons of electronic services, new apps for research, how adjusters and attorneys work together for document production and how to work with copy services.

**Speakers:**

Gene Lee, Manning & Kass, Ellrod, Ramirez, Trester LLP  
Daniel Garoutte, Knox Services, Inc.

**11:45 a.m. - 12:45 p.m.: LUNCHEON AND KEYNOTE SPEAKER****Negotiation In Relationship Driven Business**

Royal Ballroom

**Track:** Luncheon Keynote Speaker

**Session Description:**

This presentation will discuss how to use negotiation skills to mediate disputes, diffuse challenging situations, and the importance of always remembering we work in a relationship business. Interesting and rare video clips will be shown to the audience.

**Speakers:**

Edward G. Hochuli, Jones, Skelton & Hochuli, P.L.C and National Football League Referee (#85)  
Don Myles, Jones, Skelton & Hochuli, P.L.C

12:45 p.m. - 1:45 p.m.

**Afternoon Dessert Break in Exhibit Hall**

Grand Ballroom

**1:45 p.m. - 2:45 p.m.: BREAKOUT SESSIONS****Navigating the Property Appraisal Minefield**

Royal Ballroom E - F

**Track:** Property

**Session Description:**

This program aims to educate on the practical and strategical nuances of the property appraisal process. The session will be a comprehensive discussion on the appraisal process, spanning from receipt of a demand for appraisal to post-appraisal matters with a focus on the scope of an appraiser's authority in light of recent case law. Through this session, attendees will learn about common mistakes made in the appraisal process which result in excessive awards and how to avoid them. They will also learn what steps to take to preserve the insurer's right to make post-appraisal adjustments while still participating in the appraisal process in good faith, thereby minimizing post-appraisal disputes. Attendees will leave with a solid understanding of the property appraisal process in California which is invaluable in the property claims industry.

**Speakers:**

Michelle Burton, Managing Partner, Shoecraft Burton, LLP

### ***Effective Negotiation Techniques: A Workshop on Using Interests to Maximize Results***

Garden 1 - 3

**Track:** Liability

#### ***Session Description:***

This is a fun and interactive program that incorporates video clips from movies and TV shows and gives some practical advice on negotiation techniques. This course will not only improve attendees' understanding of the negotiation process, it will also improve their ability to recognize that the needs of the opposing side in negotiations aren't always monetary. The course will lead to an improved ability to resolve claims quickly and efficiently.

#### ***Speakers:***

Alexander Polsky, Mediator & Arbitrator, JAMS - The Resolution Experts

Lisa Unger, Senior Claims Examiner, Markel

### ***Using Surveillance Effectively in the Claims Handling Process***

Plaza Terrace

**Track:** SIU

#### ***Session Description:***

The objective of this session is to arm the claims professional with a working knowledge of the steps one should take in setting up and preparing to conduct a surveillance investigation so as to obtain the most effective results possible. Learning the inter-workings of a surveillance case gives the claims professional a better understanding of how and when to utilize surveillance during the claims process, resulting in increased competence of the claims professional at his job.

#### ***Speakers:***

Paul Poulin, Vice President, David Morse & Associates

Brad Balentine, Investigations/SIU Director, David Morse and Associates

Teena Barton, Senior SIU Investigator, ICW Group Insurance Companies

Michael Bender, SIU Director, ICW Group Insurance Companies

### ***UR Best Practices and Effective Use of Adjuster Authorization***

Garden 4

**Track:** Workers' Compensation

#### ***Session Description:***

Adopting adjuster-level authorization for straight-forward treatment requests can significantly improve treatment outcomes and save money. Learn how to effectively use this powerful tool.

#### ***Speakers:***

Todd Andrew, Director of Clinical Operations, CID Management

### **3:15 p.m. - 4:15 p.m.: BREAKOUT SESSIONS**

#### ***Making the Most of Initial Contacts***

Royal Ballroom E - F

**Track:** Property

#### ***Session Description:***

The goal is for the attendees to gain knowledge so that after the first call on a property loss, they will be in a position to make proper decisions as to remediation needs, scope of repairs, and coverage determination. Once they have a better understanding of an effective initial contact with an insured or claimant they can move forward to identify the various issues that arise in property losses. This course will explore how the

interworking of the adjuster, expert and defense counsel come together to resolve the matter expeditiously.

**Speakers:**

Alan Dialon, Property Adjuster, Carl Warren & Company

David Martucci, Partner, Palumbo Bergstrom

DeShaune Williams, Marketing Manager, RIMKUS

***Emerging Automotive Technologies and Their Role in Vehicle Collisions: Look Mom No Hands***

Garden 1 - 3

**Track:** Liability

**Session Description:**

What happened in the crash? This presentation will help you determine if new car technology was a contributing factor. The session will cover awareness of new technologies, understanding of their basic functions and the ability to identify possible connections with crashes.

**Speakers:**

Dr. Russell Gish, Project Engineer, MEA Forensic Engineers and Scientists

Dr. Jason Droll, Senior Scientist, Human Factors, MEA Forensic Engineers and Scientists

***The Seven Deadly Sins of Adjuster Testimony***

Plaza Terrace

**Track:** SIU

**Session Description:**

This program addresses every insurance professional's nightmare: testifying in a deposition or at trial. Using actual testimony and video, the instructors explain the most common mistakes insurance claim professionals make when testifying, share common lawyer "tricks and traps" and offer "witness tools" to help the claim professional testify effectively.

**Speakers:**

Ulises Castellon, CPCU/Chief Operating Officer, Fire Cause Analysis

Doug Wood, Esq./Partner, Morris, Polich & Purdy LLP

Jim Smith, CPCU/Claim Team Manager SIU, State Farm Insurance

***Ethical and Good Faith Worker's Compensation Claims Handling***

Garden 4

**Track:** Workers' Compensation

**Session Description:**

An examination of the duties owed by insurers to their Employer-Policyholders and the duties they both owe to injured workers.

**Speakers:**

Heywood Friedman, Law Offices of Friedman & Bartoumian

**4:15 p.m. - 4:30 p.m.: GRAND PRIZE RAFFLE DRAWING**

Grand Ballroom

**5:00 p.m. - 7:00 p.m.: CASINO NIGHT FOR ALL ATTENDEES**

Royal Ballroom

## **Wednesday, March 9, 2016**

7:00 a.m. - 2:30 p.m.

### ***Registration Desk Open***

Grand Ballroom Foyer

7:00 a.m. - 7:30 a.m.

***Exhibitor Breakfast and Set-up:*** Exhibitors with Badges only allowed in the Exhibit Hall at this time

7:30 a.m. - 9:00 a.m.

### ***Continental Breakfast in the Exhibit Hall for all Attendees***

Grand Ballroom

7:30 a.m. - 2:00 p.m.

### ***Exhibit Hall Open to All Attendees***

Grand Ballroom

## **9:00 a.m. - 10:00 a.m.: BREAKOUT SESSIONS**

### ***The Key to a Proper and Thorough Leak Detection***

Royal Ballroom E - F

***Track:*** Property

#### ***Session Description:***

This course is targeted for Homeowners Insurance adjusters, Including Independent Adjusters or any person(s) involved in Residential claims. It will demonstrate the residential application of a thorough leak detection to rule out any leaks in a residential water system. The presentation will provide education on the actual equipment used, use slides showing their proper usage, and use displays to educate the adjuster on plumbing systems.

#### ***Speakers:***

Tony Falco, Accurate Leak Locators

### ***Trip, Fall & Fly Me to the Moon***

Garden 1 - 3

***Track:*** Liability

#### ***Session Description:***

This course presents a real time challenge to risk managers and stakeholders as they address a claim as it happens, focus on evidence retention, best claims practices and interdisciplinary approach to management to the tune of Frank Sinatra's "Fly Me to the Moon". Join your colleagues for an interactive event packed with some humor and a case study which will test your skills and broaden your views.

#### ***Speakers:***

Howard Franco, Jr., Partner, Collins, Collins, Muir & Stewart, LLP

Mark Bernstein, Vice President, Chief Claims Officer, Carl Warren & Company

### ***Surveillance Management and Criminal Case Packaging***

Plaza Terrace

***Track:*** SIU

#### ***Session Description:***

Most carriers spend millions a year on surveillance, but with limited effect on the claim file. This session will showcase proven techniques and technology that have

significantly improved outcomes. Learn from a seasoned SIU Director, a successful Self-Insured and an experienced local Prosecutor as they walk you through how to turn the surveillance footage into a new medical report from the treating doctor, and how that can result in a significant reduction in claim costs and a successful criminal prosecution. Examine best practices used to turn video into an overpayment of TTD benefits, lower PD and future medical, such that the claim can quickly be settled or dismissed, without the cost of continued litigation or even the QME process.

**Speakers:**

Bill Randall, Vice President, VRC Investigations

***Zombie Liens in the World After Senate Bill 863***

Garden 4

**Track:** Workers' Compensation

**Session Description:**

Three years after the landmark legislation of Senate Bill 863, liens are still with us. Learn what's happening with "zombie" liens, the financial impact of the statute of limitation on liens, and issues related to assignments of liens.

**Speakers:**

Michael Lents, Compliance and Technical Director, Lien on Me

Demetria Willis, City of Los Angeles

Tyrone Spears, City of Los Angeles

10:00 a.m. - 10:45 a.m.

***Morning Break in the Exhibit Hall***

Grand Ballroom

**10:45 a.m. - 11:45 a.m.: BREAKOUT SESSIONS**

***Building Code: What You Don't Know Can Hurt You***

Royal Ballroom E - F

**Track:** Property

**Session Description:**

This course will familiarize participants with an understanding of which code editions have been adopted statewide and/or locally as well as independent state and city codes. The session will provide an understanding of codes, standards and regulations and the ability to recognize nuances between different editions of the adopted codes, such as International Building Code (IBC) and the International Existing Building Code (IEBC), as they relate to the insurance claim handling process. The forensic engineer will discuss newer provisions that alter the repair approach depending on if the loss is related to wind or earthquake events or if the building is located within a flood hazard area.

**Speakers:**

David Van de Oostyne, Senior Structural Engineer, Madsen, Kneppers & Associates

Blake Lander, Madsen, Kneppers & Associates

***Emerging Liability and Body Worn Cameras***

Garden 1 - 3

**Track:** Liability

**Session Description:**

Attendees will learn about the emerging liability issues created by increased demand for and use of Body Worn Cameras by police and other security personnel. Learn how to best mitigate liability.

**Speakers:**

Eugene Ramirez, Founding Partner, Manning & Kass, Ellrod, Ramirez, Trester LLP  
Chief Ed Medrano, City of Gardena

***Deceit and Fraud Detection Strategies***

Plaza Terrace

**Track:** SIU

**Session Description:**

This session will cover a range of fraud tactics and deceit behaviors and will improve your ability to spot it. You will gain successful tools for leveraging your deceit detection skills with a focus on stopping unwarranted claim benefits, abuse and fraud.

**Speakers:**

Darlene Bartholomew, Vice President, Probe Information Services  
Bethe Barkley, Attorney at Law, Grancell, Stander, Reubens, Thomas and Kinsey  
Vic Pence, SIU Investigator, Mercury Insurance

***Case Law Update: The Good, The Bad & the Ugly***

Garden 4

**Track:** Workers' Compensation

**Session Description:**

Learn the details of the most significant workers' compensation decisions of the past year in this entertaining and fact-filled presentation.

**Speakers:**

Thomas L. Bolinger, Managing Attorney, San Diego , Law Offices of Parker & Irwin  
Scott M. Tilley, Managing Attorney, San Bernardino, Law Offices of Parker & Irwin  
Zareen Morrison, Director, Risk Management, H&S Ventures  
Greg Snodgrass, Supervisor, Athens Administrators

11:45 a.m. - 12:45 p.m.: ***Luncheon and Keynote Speaker***

Royal Ballroom

12:45 p.m. - 1:30 p.m.: ***Afternoon Dessert Break in Exhibit Hall***

Grand Ballroom

**1:30 p.m. - 2:30 p.m.: BREAKOUT SESSIONS**

***Mechanics of Estimate Presentation***

Royal Ballroom E - F

**Track:** Property

**Session Description:**

With so many carriers looking to write and settle claims on site, the class will provide the adjuster with skills to better organize their estimate in a way that is understood by the average consumer. This course will teach the attendees how to explain an estimate and the next steps in the claims process in role play situations. This will improve the number and quality of on-sight settlements.

**Speakers:**

Jeff Taxier, Education and Training Manager, American Technologies, Inc.  
Sylvester Black, Home Office Consultant, Allstate Insurance Company

***The Rise Of Unmanned Aircraft Systems (Or, How I Learned To Stop Worrying And Love The Drone, With Apologies To Dr. Strangelove)***

Garden 1 - 3

**Track:** Liability

**Session Description:**

This session will educate attendees about a rapidly changing area of the law that involves technology which is projected to generate sales of one billion dollars within the next two years, and which involves coverage and liability issues.

**Speakers:**

Kevin Hansen, Esq., Attorney, McCormick Barstow  
Peter Schiffrin, RPA, President, Schiffrin, Gagnon & Dickey

**Claims Handling, Forensic Services and Ethical Concerns**

Plaza Terrace

**Track:** SIU

**Session Description:**

This class is intended to bring awareness to the claims adjuster of situations where ethical and moral concerns arise when forensic services are used in the claims handling process. A number of situational dilemmas are presented to the attending claims adjusters and then a discussion is made of what transpired and the ethical considerations and potential consequences are discussed. The class also sensationalizes that forensic service experts are neutral parties and are not advocates for the position that best serves their clients and must always provide opinions that are supported by witness statements and evidence. The attendee is fully made aware of the potential harm and damages that can be sustained by the consumer by anything contrary.

**Speakers:**

Michael Reynolds, Assistant Vice President, Unified Investigations and Sciences  
Sam Massey, Special Investigator, The Hartford Insurance Group SIU

**Update from the Division of Workers' Compensation and the Latest Regulations**

Garden 4

**Track:** Workers' Compensation

**Session Description:**

The final regulations implementing Senate Bill 863 are in force. This session will cover the real-life application of the regulations as they apply to audits, medical treatment, and the new workers' compensation formulary.

**Speakers:**

Cora Lee, Manager, Division of Workers' Compensation  
Alex Rossi, County of Los Angeles

2:30 p.m. - 2:45 p.m.: **Coffee and Energy Break**

Royal Ballroom Foyer

**2:45 p.m. - 3:45 p.m.: CLOSING GENERAL SESSION**

**Facing Disaster with Calm, Confidence and Competence**

Royal Ballroom

**Session Description:**

This closing seminar will focus on how the insurance claims industry can prepare for and efficiently and effectively manage emergency response to disasters. Come prepared for the unknown. We will "experience" a disaster and you will have hands on interactive training on how to facilitate the claims handling process from initial reporting to file closure. This will be an interactive and instructive session with our professionals providing valuable insight into emergency response preparedness and how to deal with

the fallout. Be forewarned, the execution of a waiver and release may be necessary for your attendance at this closing session.

***Speakers:***

Caryn Siebert, Claims Professional and Risk Management Executive

Diana Rich, Workers' Compensation and Public Entity Risk Executive