

# 18TH Annual CLAIMS EDUCATION CONFERENCE

*Presented by*

American Educational Institute, International Insurance Institute  
and Society of Claim Law Associates



American  
Educational  
Institute



International  
Insurance  
Institute, Inc.



**MAY 2-5, 2023**  
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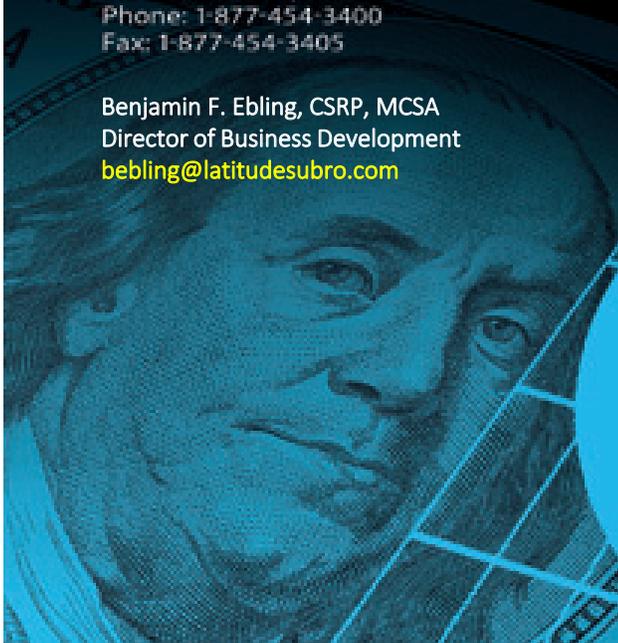
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# Welcome

Welcome...to the Claims Education Conference of the International Insurance Institute, Inc., American Educational Institute and The Society of Claim Law Associates.

We are looking forward to returning to New Orleans for our 18th Annual Claims Education Conference taking place May 2-5, 2023. New Orleans, pronounced “New Or-Lins” or “New Or-Lee-Yuns” (not “Naw-Lins” or “New Or-l-eens”) is famous for its unique culture, rich history and warm hospitality. Take a look through this brochure to learn more about our host hotel and the various activities that we have planned to make your “New Or-Lins” visit an unforgettable adventure.

We are proud that this is the conference where AEI designees are recognized for their achievements. Claims professionals who, between January 1, 2022 and April 8, 2023 earn a Claim Law Specialist Designation, a Claim Law Associate Designation, a Senior Claim Law Associate Designation (SCLA) – the ultimate in claims law professionalism – or a Silver or Gold Award, will be recognized at the Designation Conferment on Wednesday, May 3rd.

In addition, the conference will provide high-level training away from the office where claims professionals will be able to focus on high-quality performance, enabling them to work more efficiently and provide superior customer service.

Of course, we want everyone to experience New Orleans while at the conference, so we have built in some great recreational activities. Wednesday evening will feature our annual group dinner and this year we’re headed to Meril, Chef Emeril Lagasse’s latest concept and fourth restaurant in New Orleans. Thursday afternoon you can choose to sign up for a cooking class at the New Orleans School of Cooking, an airboat tour of Louisiana’s swamps, or hop on the Creole Queen for a jazzy river cruise on Thursday evening. You can also choose to venture out on your own and explore all that New Orleans has to offer: shopping on Royal Street, indulging in beignets at Café Du Monde, a guided bicycle tour of the city or diving in to history at the World War II Museum are just a few of the options in the Crescent City. On top of that, the world-famous New Orleans Jazz Fest takes place the weekends prior and post conference – visit [www.nojazzfest.com](http://www.nojazzfest.com) for more details.

Be sure to take advantage of the early bird rate and register by December 31st. We look forward to seeing you in May and, as we say in New Orleans, Laissez Les Bon Temps Rouler! (Let the Good Times Roll!)



**Carl Van, President and CEO**  
International Insurance Institute, Inc.



**Amy Koernig**  
President, American Educational Institute



**Laura Stengl**  
President, Society of Claim Law  
Associates

# Reasons to Attend the CEC

## Why should you attend the Claims Education Conference?

No company in the insurance industry has been more focused on improving the level of claims professionals through in-person training than **International Insurance Institute, Inc. (III)**.

Since its inception in April 1998, III has delivered more claims-specific training, to more companies, in more countries, than any claims training company in the world. In-person courses by III have been delivered in-person, on-site to over 265,000 claims professionals worldwide.

The conference will not only be informative and fun, but will allow you to get a glimpse of the many claims specific courses III has to offer.

**American Educational Institute (AEI) and The Society of Claim Law Associates (Society)**, your partners in claims law education, are committed to helping claims professionals increase their claims law knowledge and to stay current with the latest claims and legal issues. The conference also provides recognition for new AEI designees. Individuals are recognized for having achieved designations of Specialist, Associate and the “ultimate in claims law professionalism” – *Senior Claim Law Associate (SCLA)*. Silver and Gold award recipients are also recognized.

Attending the conference will allow you access to targeted sessions focusing on legal and coverage issues all presented by leading technical experts and nationally recognized insurance defense attorneys. Participation in the conference, however, is not limited to SCLA members or AEI designees. All insurance claims professionals are invited to attend.

We hope to see you there!

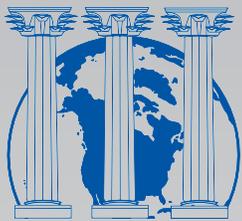


# About



## **American Educational Institute**

American Educational Institute (AEI), established in 1969, is the premier provider of self-study programs in insurance claims law. Courses are practical, flexible, and interactive. Programs in: Legal Principles, Liability, Property, Workers' Compensation, Fraud Investigation and Defense, and Automobile lead to industry-recognized designations including AEI's highest, the Senior Claim Law Associate (SCLA). Courses are approved for continuing education credit toward adjuster license renewal in many states and college credit by the National College Credit Recommendation Service.



## **International Insurance Institute, Inc.**

### **International Insurance Institute, Inc.**

International Insurance Institute, Inc. (III) provides claims training and a variety of other superior services dedicated to the enhancement of the insurance industry. Their goal is to assist the claims environment in its many highly technical and ever changing methods of operation via their analysis recommendation and educational processes.

III strives to deliver information and education that is enlightening and useful. They not only assist in identifying needs, but develop procedures and training to facilitate immediate and significant improvement. With a track record of in-depth claims experience, they are committed to servicing the needs of their customers from beginning to end as no other individual company can. From initial needs analysis to flowcharting procedures; from workflow documentation to improvement design; from program improvement development to implementation and monitoring; from training course development to facilitation, International Insurance Institute, Inc. will be there to fulfill their customer's needs and exceed expectations.



### **Society of Claim Law Associates (Society)**

The Society of Claim Law Associates (Society) is an organization of insurance claims professionals who have earned claims law designations from American Educational Institute (AEI). The mission of the Society of Claim Law Associates is to promote claims professionalism through education, improve the level of understanding, knowledge, and expertise of its members in the area of claims law and provide a forum for the exchange of information and ideas relating to claims law. The Society will help to establish, maintain, and promote a level of professionalism among its members through its activities and encourage and assist others to become the most proficient and knowledgeable claims professionals they can be.

# Conference Leadership



**Carl Van, ITP, President & CEO of International Insurance Institute, Inc.,** graduated from California State University, Sacramento where he received his bachelor's degree in Insurance. He has been in the insurance claims industry since 1980 and has held the positions of Claims Adjuster, Claims Supervisor, Claims Manager, Division Claims Manager and Regional Manager over Claims, Loss Control and Premium Audit.

Mr. Van has set up 5 in-house claims training programs for various insurance companies throughout the United States, and has written articles for *Claims magazine*, *Claims Education Magazine*, *Claims Advisor*, *Claims People magazine*, *The Subrogator*, *The National Underwriter*, *California Insurance Journal* and over 100 other national magazines. He is the author of over 75 technical and soft skill workshops being taught throughout the U.S., Canada and the U.K.

He has been a keynote speaker at claims conferences around the country, a trainer at an international U.S.-Japanese executive training program, a guest speaker at hundreds of claims association seminars, and selected as the opening presenter at some of the most prestigious claims conferences in the United States and Canada.

Mr. Van is the Dean of the School of Claims Performance, and has served as both board member and Regional Vice President of the Society of Insurance Trainers and Educators. He is owner and publisher of *Claims Education Magazine*, and board president of the *Claims Education Conference*.

He is creator, presenter and producer of all claims training videos at *Claims Education Online*, which include Time Management, Customer Service, Negotiations and Critical Thinking, all specific to claims professionals.

Mr. Van is owner and publisher of *Claims Professional Books Online*, and is the author of the highly acclaimed book *The 8 Characteristics of the Awesome Adjuster*, which has sold internationally throughout the United States, Canada, Guam, Singapore, France, Australia, England, Chile, Ireland, and 25 other countries. Other books by Carl Van include *Gaining Cooperation*, *Gaining Cooperation for the Workers' Comp. Professional*, *The Claims Cookbook*, *Attitude, Ability and the 80/20 Rule*, *The Eight Characteristics of the Awesome Employee*, *Negotiations Skills for the Claims Professional*, and *Awesome Claims Customer Service*.

Past credits include being an arbitrator, a licensed agent, a TASA certified expert witness for insurance Bad Faith suits, as well as a national auditor for a federal regulatory agency.

Just for fun he writes all lyrics to the songs performed by [Carl Van and the Awesome Adjuster Band](#), and he has produced a documentary entitled "Love Letters: Samantha Fish Live from New Orleans" that aired on PBS.

# Conference Leadership



**Jon Coscia, CSR, President of Latitude Subrogation Services**, holds an Associate Degree in Criminal Justice from Schoolcraft College, in Livonia, MI and a Certified Subrogation Recovery Professional designation from the National Association of Subrogation Professionals.

He currently oversees all areas of company operations including sales and marketing, strategic planning, accounting, business unit operations, claims, information technology, human resources, and employee development.

Mr. Coscia has held the positions of Claims Adjuster, Claims Supervisor, Claims Manager with a national insurance carrier, and brings with him over 25 years of subrogation, claims management and leadership experience.

He is the Associate Dean of the *School of Claims Performance* through the International Insurance Institute and has served as both board member and Vice President of the *Claims Education Conference* since 2014.

Mr. Coscia is Sr. Content Consultant to *Claims Professional Books Online* and is the author of the highly acclaimed book, *Awesome Claims Customer Service—Part 1* which was the #1 selling claims book for 2021, and has sold internationally throughout the United States, Canada, Australia, England, and 9 other countries.

He has been featured in numerous periodicals as well as the lead story entitled, “Living By Core Values” in the 2016 Winter issue of *Claims Education Magazine*.

Mr. Coscia is co-author of the *Employee Development* management course offered through III, and his article entitled, “Employee Education and Development” outlines many of his respected tips on tapping employee talent.

He is an active board member of National Association of Subrogation Professionals serving as Treasurer and is chair of the Technology committee. He is also a current member of PLRB and NAMIC.

[www.LatitudeSubro.com](http://www.LatitudeSubro.com)

[www.ClaimsEducationConference.net](http://www.ClaimsEducationConference.net)

[www.ClaimsProfessionalBooks.com](http://www.ClaimsProfessionalBooks.com)

[www.linkedin.com/in/joncoscia/](http://www.linkedin.com/in/joncoscia/)

[www.Subrogation.org](http://www.Subrogation.org)

# Conference Leadership



**Dave Vanderpan, Director of Claims Training, International Insurance Institute, Inc.**, graduated from the University of California at Davis with a Bachelor degree in both International Relations and Economics.

He has been in the insurance claims industry since 1986, and has held the positions of Claims Adjuster, Claims Supervisor, Claims Manager and Regional Claims Manager.

Mr. Vanderpan has been training claims professionals for over 25 years, and has developed and presented many in-house training sessions. He has conducted over 500 training classes in over 40 states throughout the U.S., and has been a featured speaker at conferences in Canada and England.

Mr. Vanderpan helped develop the material and presentation format of the most successful class offered by the International Insurance Institute, Inc., the popular Awesome Claims Customer Service which was featured in *Claims* magazine. He is the author of numerous successful workshops offered at the annual Claims Education Conference including the highly respected Litigation Management and the fun-packed Team Building Games for Claims.

Mr. Vanderpan has been the subject of many articles regarding exceptional claims performance and was featured in *Claims Education Magazine*. He is co-presenter of the *Negotiation Skills for Claims Professionals* online training course available at [ClaimsEducationOnline.com](http://ClaimsEducationOnline.com).



**Teresa Headrick, ITP, Director of Course Development, International Insurance Institute, Inc.** has been in the industry since 1977, leading to management and learning/development with a staff of training consultants, quality assurance specialists and business development managers.

Ms. Headrick earned her ITP (Insurance Training Professional) designation from the Society of Insurance Trainers and Educators (SITE) and her CPLP (Certified Professional in Learning and Performance) designation from the Association for Talent Development (ATD), specializing in Human Performance Improvement.

She has held several Board positions with SITE, including President July 2011 – June 2012. She also served three consecutive terms as President of her regional chapter of ATD.

She specializes in identifying and leveraging natural talents for any size organization or team using “StrengthsFinder 2.0 From Gallup – Discover Your CliftonStrengths.” She is widely considered the leading industry expert in guiding organizations on how to discover and apply strengths, putting them to work to strengthen individuals and teams.

Ms. Headrick’s corporate management experience, her senior leadership roles with national and local societies, and her commitment to the insurance industry, make her uniquely qualified to write and train on the subjects of leadership and employee development.

Other credits include being a licensed insurance broker, and co-authoring *Negotiation Skills for the Claims Professional*, offered at [ClaimsProfessionalBooks.com](http://ClaimsProfessionalBooks.com).

# Conference Leadership



**Ann Van, Conference Director**, graduated from Middle Tennessee State University with both a Bachelor of Science degree in Social Sciences and Math with an emphasis in secondary education, and a Master's degree in Education/School Counseling.

Ms. Van has 10 years of teaching experience and seven years of experience in school counseling, and has held the position of Conference Director for the Claims Education Conference since its inception. Ms. Van is responsible for choosing the hotel and city locations for the Claims Education Conference, overseeing all conference activities, as well as conference material design.



**Lisa Ferrier, Conference Manager**, graduated from the University of Minnesota with a Bachelor of Arts degree in English and French. She has been working in the conference and event planning business for over 15 years and her experience includes meeting, exhibit and seminar planning and promotion. Ms. Ferrier is responsible for all conference operations including registration, contract management, and marketing.



**Corinn McBride**, Director of Marketing at American Educational Institute (AEI) and Executive Director of the Society of Claim Law Associates (Society) Board of Trustees, graduated with Bachelor of Arts degree in Media Studies from Mount Saint Mary College and a Master of Arts degree in Corporate and Organizational Communication from Fairleigh Dickinson University. She has over twenty years of marketing, public relations and event planning experience. She is the conference contact for any current or prior AEI student that will be attending, as well as the organizer of the AEI Designation Conferment ceremony held during the conference.



**Laura Stengl, SCLA, President, The Society of Claim Law Associates** Laura has been a claims professional since 2003 and has a strong commitment to professional education achieving her SCLA designation in 2006 and SCLA Silver and Gold Awards in 2007. Laura has been involved in the Society of Claim Law Associates as a Board of Trustee for four terms and is currently serving as President since 2020.

# Conference Speakers

**David Alfini, Esq., Partner, Hinshaw & Culbertson, LLP**

**James T. Busenlener, Esq., Partner, Matthiesen, Wickert & Lehrer, S.C.**

**Jarred Dichek, Esq., Shareholder, Kubicki Draper**

**Emily Faith, Esq., Litigation Services Manager, DONAN**

**Duncan K. Fobes, Esq., Principal, Patterson, Buchanan, Fobes & Leitch**

**Matt Hawk, Director of Specialty Operations, InspectionConnection, LLC**

**Teresa Headrick, Director of Course Development, International Insurance Institute, Inc.**

**Lee Herman, President, InspectionConnection, LLC**

**Kenneth Oliver, Esq., Equity Partner, Kubicki Draper**

**Allan Rotlewicz, Esq., Partner, RumbergerKirk**

**Matthew Sekits, Esq. Shareholder-in-Charge, Bullivant, Houser Bailey, P.C.**

**Carl Van, President and CEO, International Insurance Institute, Inc.**

**Dave Vanderpan, Director of Claims Training, International Insurance Institute, Inc.**

*- Speakers subject to change -*

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# Conference Sessions

## Soft Skills Track

- Time Management: Dealing with Interruptions
- Negotiation Skills: Words to Avoid with Unrepresented Parties
- Interpersonal Skills: How to deal with the snide comment
- Negotiation Skills: Staying in Your Conversation
- Loss Prevention in the Restaurant Industry
- Time Management: Tips for Reducing Phone Calls
- File Documentation 1: Nine Most Common File Documentation Errors (combined with Management Track)
- File Documentation 2: Common Claims Standards to Improve File Documentations (combined with Management Track)

## Management Track

- CliftonStrengths Part 1
- CliftonStrengths Part 2
- The World of Specialty: How to Handle Unique Physical Damage Claims
- Critical Thinking Games: Learning to Think Things Through
- Driving Up Employee Performance
- File Documentation 1: Nine Most Common File Documentation Errors (combined with Soft Skills Track)
- File Documentation 2: Common Claims Standards to Improve File Documentations (combined with Soft Skills Track)

## Technical Track\*

*\*Technical Topics from last year included the following – New Sessions TBA*

- Breaking Down Bad Faith: Insurers' Good Faith Duties and Defusing Plaintiff Perceptions
- Ethics for Insurance Professionals
- Social Media in the Evaluation of Insurance Claims
- The Daubert Challenge: Lessons Learned from Fighting the Motion to Exclude
- Panning for Subrogation Gold: How to Recognize and Pursue Valuable Subrogation Claims
- Duty to Defend Broader than the Duty to Indemnify
- The Tender Trap: Tips and Strategies for Dealing with Tenders of Defense and Risk Transfer
- Tips for Success from Insurance Claims Industry Leaders – Roundtable Discussion

# Soft Skills Track

## Time Management: Dealing with Interruptions

Instructor: Carl Van, ITP

Do constant interruptions get in your way of getting things done? What if you knew everything that was going to happen to you at the beginning of the day? Imagine how wonderful it would be if you could put everything that would eventually happen during the day on your to-do list at the beginning of the day. Would that be a relief? Sure, because then you could prioritize everything you had and nothing would interrupt you.



In this session you will learn the right way to plan and prioritize your activities so you don't end the day feeling like you got nothing done.

### You will learn skills that will:

- Help you prioritize
- Gain a sense of satisfaction at the end of the day
- Allow you to forget work or tasks at night
- Focus you on next item and priorities
- Focus you on your workload and help you say “no” when appropriate
- Keep you in the “20% time 80% results area”

## Negotiation Skills – Words to Avoid with Unrepresented Parties

Instructor: Carl Van, ITP

When negotiating with unrepresented parties, it is especially important to demonstrate a level of concern for paying a fair amount along with outlining the efforts to make that happen.

Often claims professionals utilize words and phrases that can send the exact opposite message that they are trying to convey. In this session, attendees will learn some very common words and phrases that should be avoided when negotiating with unrepresented parties.



The impact of words and phrases such as offer, willing to, took a look at, came up with, about, only and many others will all be discussed. Attendees will learn the right way to say things in order to take the credit for the hard work they do.

## **Interpersonal Skills: How to deal with the snide comment**

Instructor: Dave Vanderpan

Claims professionals sometimes place barriers (or fail to remove obstacles) to settlement simply because they do not recognize when a customer is asking for help. Most of us in claims will not recognize that when a customer makes a snide comment, such as, “Thanks for calling...finally,” the customer is actually asking for something. We take it as an attack, and generally it is not! It is a request.

For example, some people make snide comments when they are irritated. For those people, it is important to recognize what they want when they make the snide comment. They don't want you to admit a mistake. They don't want you to say you are not worthy of them. They do not want you to admit you are a horrible person. What do they want? You'll be surprised. Come learn how to deal with this issue, and make your job much easier.



## **Negotiation Skills – Staying in Your Conversation**

Instructor: Dave Vanderpan

Many claims professionals think it is a good idea to attack the strengths of the other party's demands, or deny the weaknesses of their own position. The truly skilled negotiator knows this is a recipe for disaster, as it serves to increase the chances of emotional manipulation, decreases trust and wastes valuable time.



In this session, you will learn how to stay in your conversation making points that: actually convince the other party they should consider what you say; let them know that you are knowledgeable and can't be tricked; help you avoid getting caught in emotional traps.

## **Loss Prevention in the Restaurant Industry**

Instructor: Teresa Headrick, ITP

Beignets were first introduced to the city of New Orleans by the French - Creole colonists in the 18th century. The concept is simple – dough is fried then covered with mounds of powdered sugar – but the result is extraordinary. When served hot, they are absolute perfection.

In this session, we will learn how to make beignets, watch firsthand and maybe even help as a Hilton New Orleans chef makes beignets and, best of all, we will gobble them up after the demonstration!

But, in our profession, we know that there is a risk management side to this type of activity. What do restaurants need to keep in mind as they drop gooey balls of dough into burning hot oil? Come to this session and find out!



## **Time Management: Tips for Reducing Phone Calls**

Instructor: Dave Vanderpan

How often have you taken the time to explain the claims process in detail to a customer, only to have them call you back 15 minutes later with a question? Not a new question, but a question about something you just told them. It happens all the time. What we don't realize is that we create most of the problem ourselves. We complain about too many phone calls or too many voice mails but often, we are the cause of those very same unnecessary calls. We do things that actually encourage people to call us, instead of taking steps to make sure they don't have to call us.

In this session you will learn five tips to help you reduce the number of calls you receive, and the number of calls you have to return. When practiced and used these five tips will save time, reduce extra work and make the job less stressful.



# **Management Track**

## **CliftonStrengths Part 1\***

Instructor: Teresa Headrick, ITP

One of the key responsibilities of any leader is to identify and utilize your own natural talents and talents on your team. You don't have to waste time guessing because Gallup, a global research firm, has a tool to help!

For 30 years, Gallup studied human talents and strengths, and interviewed two million people asking, "At work, do you have the opportunity to do what you do best every day?" Gallup's studies and the survey results built StrengthsFinder 2.0.

This session introduces 'StrengthsFinder 2.0 From Gallup – Discover Your CliftonStrengths' and uses your online Gallup Assessment results to link behaviors to your successes and challenges at work and at home. This insight can improve your communication, build mutual respect and enhance your productivity.

\*Pre-work is required for this session.



Visit [claimseducationconference.net](http://claimseducationconference.net) for details on the pre-work.

## CliftonStrengths Part 2\*

Instructor: Teresa Headrick, ITP

\*You must attend part 1 in order to participate in this session.

The goal of this workshop is to provide attendees guidance to utilize CliftonStrengths 2.0 to discover, develop and maximize your and your team members' natural talents.

By the end of the workshop, you will be able to:

- Utilize your Gallup assessment results to understand what you do best
- Identify how your strengths link to behaviors – both productive behaviors and derailing
- Discover the diversity in natural talents of others

## The World of Specialty: How to Handle Unique Physical Damage Claims

Instructors: Matt Hawk and Lee Herman

In this session, we explore and discuss the “World of Specialty” with the team from InspectionConnection. Auto claims have evolved precise and consistent ways to handle. Heavy equipment, farm machinery, commercial trucks and powersports offer challenges that auto professionals sometimes fail to recognize. We will discuss the appraisal, evaluation, salvage, and unique characteristics of these very specialized claims.



## Critical Thinking Games: Learning to Think Things Through

Instructor: Carl Van, ITP

Effective leadership decision making is not about always being right. It is about thinking things through. It is about testing assumptions. It is about considering the relevant information, avoiding the pitfalls, and making the best decision possible.

Topics Include:

- Critical thinking skills for leaders
- Learning how to think things through
- Opposite Blindness – Mistakenly thinking two things are opposite when they are not (quality vs. customer service)
- Avoiding the pitfalls of poor decision making

In this session, you will be tested to develop and implement leadership decisions to solve common workplace problems. You might make mistakes (actually, you probably will) but that is okay.



## Driving up Employee Performance

Instructor: Carl Van, ITP

Managers spend a tremendous amount of time trying to improve employee performance by focusing on their ability. Yet most experts would say that people's performance is driven more by their attitude than their ability.

The very top performers come to the job with the attitude that it's their job to improve themselves, but most employees do not. The managers who are best at driving employee performance focus on inspiring employees to improve themselves. Once you have inspired people to want to improve, they will do most of the work in driving up their performance. It is your job to get them to want to improve.



## Soft Skills and Management Track combined

### File Documentation Part 1: Nine Most Common File Documentation Errors

Instructor: Carl Van, ITP

While adjusters can do many things to enhance the culture and commitment of the service they are trying to provide, probably the most important is file documentation.

There is very little that will determine the direction a claim takes more than file documentation. The issue isn't just "is there documentation in the file?" but "is the documentation an accurate reflection of the claim?" The answer depends heavily on the file's documentation quality and timeliness.



Good file documentation can help resolve issues that may arise when there is a misunderstanding between the customer and the adjuster.

In this session, we will review tips to make sure claims professionals avoid file notes that are:

- Vague and ambiguous
- Incomplete
- Incorrect
- Wordy and without purpose
- Unprofessional
- Judgmental
- Rude
- Condescending
- Self-inflicting

## File Documentation Part 2: Common Claims Standards to Improve File Documentations

Instructor: Carl Van, ITP

Professionalism is a key factor. A file that is professional in nature can positively reflect on the adjuster's knowledge, experience and desire to do the right thing for the customer. It is important to project a high level of professionalism in order to gain the confidence of those individuals outside of the company who may review the file notes.

In this session, we will cover these topics:

- Files notes that are accurate
- Being thorough
- Importance of timely documentation
- Make sure notes are clear
- Being honest
- Professionalism in the claims file

## Technical Track

*(Below are the technical track sessions that were offered in 2022. For the most current list of technical breakout session topics, visit [claimseducationconference.net](http://claimseducationconference.net))*

- Breaking Down Bad Faith: Insurers' Good Faith Duties and Defusing Plaintiff Perceptions
- Ethics for Insurance Professionals
- Social Media in the Evaluation of Insurance Claims
- The Daubert Challenge: Lessons Learned from Fighting the Motion to Exclude
- Panning for Subrogation Gold: How to Recognize and Pursue Valuable Subrogation Claims
- Duty to Defend Broader than the Duty to Indemnify
- The Tender Trap: Tips and Strategies for Dealing with Tenders of Defense and Risk Transfer
- Tips for Success from Insurance Claims Industry Leaders – Roundtable Discussion



## AEI Designation Conferment

**Wednesday, May 3rd 4:15 p.m. – 5:45 p.m.**

This is the conference where new AEI designees are recognized for their achievements. You've done the work, successfully completed the examinations, earned the designation or award – now it's time to be recognized for your achievement at the AEI Designation Conferment. AEI designees and award recipients to be recognized include those registrants who earned a designation or a Silver or Gold Award between January 1, 2022 and April 8, 2023. Cocktails and hors d'oeuvres will be available for the designees and their paid guests.



## Annual Group Dinner at Meril's

**Wednesday, May 3rd**

**Seating times at 6:00 pm, 6:15 pm, 6:30 pm, 6:45 pm and 7:00 pm.**

New Restaurant for 2023!

Join us for a group dinner at Meril, Chef Emeril Lagasse's latest concept and fourth restaurant in New Orleans. Named after his daughter and located in the Warehouse District, Meril showcases some of Lagasse's favorite dishes like Gulf Fish Tacos and Korean Chicken Wings. Participants will order off the menu and pay for their own meal. Sign up times will be available at the conference registration desk, but please indicate on your conference registration form if you plan to participate so that we reserve the appropriate amount of seating.

Meril's Restaurant is within walking distance of the Hilton New Orleans Riverside. Join us to walk over as a group or you may also arrange your own transportation via taxi or a rideshare service such as Uber or Lyft. Transportation will not be provided.



# Optional Activities

## Optional Activities

These activities take place on the afternoon of Thursday, May 4th.

### Airboat Adventures Swamp Tour

**12:45 p.m. – 4:30 p.m.**

Join us for a high-speed Airboat Ride and Louisiana Swamp Tour. You'll be touring 20,000 acres of tidewater cypress swamp. It's a dynamic ecosystem supporting many types of aquatic and moist-soil vegetation, as well as a diverse wildlife population. You will be immersed in some of the most beautiful scenery in the world as you go through the swamp and into the bayous lined with moss-draped cypress and tupelo-gum trees. During your tour, you'll have opportunities to see alligators, snakes, turtles, egrets, herons and ibis, and sometimes hawks, owls and bald eagles. \$90 per person.



### New Orleans School of Cooking

**12:45 p.m. – 4:00 p.m.**

Since 1980, the New Orleans School of Cooking has introduced countless visitors from around the world to the wonderful food and rich culture of New Orleans and Louisiana as a whole. You will learn the basics of Louisiana Cooking in a way you'll never forget. Fun is the primary ingredient! In this highly interactive class, you will actually cut, season and sauté a complete meal with one of the expert chefs. Afterwards, you will be able to sit down and enjoy the meal you have just created. Past menu items have included BBQ Shrimp, Bananas Foster, Seafood Gumbo, Jambalaya and many other classic dishes. This class is not limited to gourmet cooks – all skill levels are welcome to join in on the fun! \$165 per person.



### Dinner Jazz Cruise on the Creole Queen Riverboat

**6:30 p.m. – 9:00 p.m.**

Step back into the glamour and romance of the riverboat era with a jazzy cruise. Experience the lively sounds of the amazing live jazz band while enjoying a classic New Orleans cocktail. Take in the sweet Mississippi River breezes on the promenade deck as the city skyline slips by under a canopy of stars. This cruise is pure New Orleans! You can choose to register for the cruise only, or the cruise and lavish Creole buffet dinner held in the elegantly appointed dining room. \$90 per person, includes Creole buffet dinner. \$50 per person cruise only - no dinner. Cash bar available.



# New Orleans Jazz and Heritage Festival



Come for the conference, stay for the New Orleans Jazz and Heritage Festival on May 5th, 6th and 7th. Extended discounted conference hotel pricing available Friday, May 5th through Sunday, May 7th.

Performers in 2022 included Stevie Nicks, Red Hot Chili Peppers, The Who, Jimmy Buffett, Lionel Richie, Norah Jones, Ziggy Marley, Melissa Etheridge, The Black Crowes, Boz Scaggs, Randy Newman, Chris Isaak, Samantha Fish and 140 more musical acts. The 2023 schedule for Jazz Fest will be released in early 2023.

The conference ends at 11:30 a.m. on Friday, May 5th, 2023, so plenty of time to get to the festival and enjoy Friday's events. Visit [nojazzfest.com](http://nojazzfest.com) for more information and to purchase tickets.



# Hotel Information

**Hilton New Orleans Riverside**  
**Two Poydras Street**  
**New Orleans, LA 70130**

Explore the best of New Orleans from the Hilton New Orleans Riverside hotel in the heart of downtown. Unwind in a comfortable guest room that offers WiFi, a 37-inch flat-screen TV, mini-refrigerator, and work desk. Upgrade to a View room for amazing views of the Mississippi River or French Quarter.

Located across the street from Harrah’s Casino, attached to the Outlet Collection at the Riverwalk and just a few blocks from the French Quarter, Audubon Aquarium, and countless restaurants, art galleries, and more, the Hilton New Orleans Riverside offers great space to relax and unwind after your time in the Big Easy.

**Conference Room Rates and Reservations**

\$249 Single/Double

16.2% sales tax and \$3 per night occupancy tax

Self-Parking is \$44 per 24-hour period; Valet-Parking is \$49 per 24-hour period

Health Club Access - \$12 per day (multi-day pass available for \$10 per day. Health Club complimentary for Hilton Honors Silver, Gold or Diamond members).

To make reservations, call the Hilton In-House Reservations Office @ 504-561-0500, ext. 3959 or go to the website specifically prepared for the Claims Education Conference. Go to [www.claimseducationconference.net](http://www.claimseducationconference.net), then go to “Hotel Information” under the “Venue and Travel” tab.

Featuring views of the city, river or numerous courtyards, the standard rooms at the Hilton New Orleans Riverside are spacious and welcoming. The rooms have one king or two queen beds, a work desk, and a 37-inch LCD TV. Complimentary guestroom internet is available to attendees of the Claims Education Conference.

Discounted room rates will be available three days prior and three days post-conference dates based on hotel availability. To take advantage of an extended stay beyond the dates of the conference, please call the Hilton In-House Reservations Office @ 504-561-0500, ext. 3959. The conference room rate of \$249 will be available until April 8, 2023 or until the room block is filled, whichever comes first.

All reservations will require a one (1) night deposit which is refundable if cancellation notice is received at least 72 hours prior to arrival.



# Hotel Information

## Hotel Dining Options

### **Drago's Seafood**

Drago's, a New Orleans dining institution since 1969, offers an extensive seafood menu, including their legendary Charbroiled Oysters. It all started back in 1993, when Tommy Cvitanovich, the second generation restaurant manager, decided to experiment with a sauce of garlic, butter and herbs. He brushed it on a fresh batch of oysters, then dusted them with a blend of Parmesan and Romano cheese and cooked them in their shell on a hot grill. The results were incredibly delicious—and a legend was born!



### **Spirits**

New Orleans is a mecca for the senses. Taste, hear, see, feel the rhythm by embarking on your journey from the awe inspiring surroundings of SPIRITS. Excite your palate with mouth-watering New Orleans style samplings, or simply enjoy the “Delta Breeze” and the wide assortment of cocktails, wine, and beer Spirits has to offer.



### **River Blends Café**

Enjoy a quick breakfast, a cup of coffee, espresso, or latte or a deli sandwich in River Blends Café, the on-site coffee house proudly serving Starbucks Coffee, conveniently located on the second floor adjacent to the main lobby. Free wireless internet is available.



# Hotel Information

## Hotel Dining Options

### **Public Belt**

Where a speakeasy meets a piano bar, the Public Belt was born out of the long slow sound of the nightly train. The Hilton Riverside celebrates all that the rail brought to our city at the turn of the 20th century; just as the Belt connected places, guests can connect to an era of candle-lit rooms, the sound of hot jazz and the romance of a stolen moment. Enjoy classic hand-crafted cocktails like the Sazerac or Hurricane, or live on the edge and go with the “Dealer’s Choice” and allow the bartender to create a cocktail specifically for you.



### **Le Croissant**

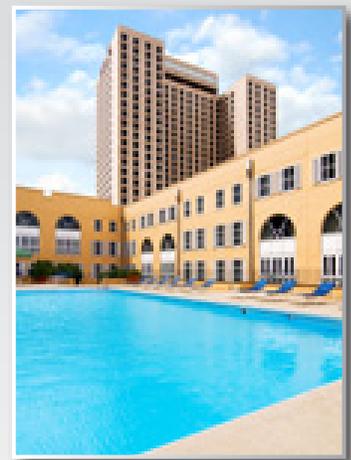
Start your day off at Le Croissant, located on the street level of the Hilton New Orleans Riverside and featuring the “Hilton Breakfast” buffet. Everyone’s idea of the perfect breakfast is different! No matter what you like to eat, you’re sure to find your favorites on this buffet, or cooked to order. The buffet includes a made to order omelet and egg station, hot coffee, fresh fruit, pastries and many other delectable options. You can also choose to order a la carte.



## **Stay Fit**

### **Fitness Facilities**

This downtown New Orleans hotel offers 90,000 square feet of full-service health and fitness facilities. The Health Club by Hilton features a fitness center, exercise classes, and indoor tennis, squash, and racquetball courts. Refresh after a workout by plunging into one of two outdoor swimming pools or spend time relaxing poolside. Health club access is \$12 per day, or \$10 per day by arranging a multiple day pass. Health Club is complimentary for Hilton Honors Silver, Gold or Diamond members.



# Things To Do

Stay at Hilton New Orleans Riverside and be in the center of it all. This downtown New Orleans hotel location offers stunning views of the Mississippi River and the city. Enjoy easy access to historic New Orleans streetcar lines, top attractions and restaurants. Hilton New Orleans Riverside is next door to the Riverwalk, New Orleans Cruise Port and Harrah's Casino. The hotel is also conveniently located to the following attractions:

- Aquarium of the Americas (3 blocks)
- Arts & Warehouse District (3 blocks)
- Audubon Zoo (4 miles)
- Canal Street Shopping (4 blocks)
- French Quarter (4 blocks)
- Harrah's Casino (1 block)
- Hop-On Hop-Off New Orleans (1 block)
- Jackson Square (5 blocks)
- Jax Brewery (8 blocks)
- IMAX Theatre (.4 miles)
- Mardi Gras Museum (1 mile)
- Mercedes Benz Superdome (1 mile)
- National WWII Museum (8 blocks)
- New Orleans Museum of Art (NOMA) (5 miles, accessible via streetcar)
- New Orleans Riverfront Streetcar (1 block)
- Ogden Museum of Southern Art (8 blocks)
- St. Louis Cathedral (5 blocks)
- TPC Golf Club (13 miles)
- The Outlet Collection at Riverwalk (on site)
- Woldenberg Riverfront Park (on site)



# Transportation

## **Airport**

The Louis Armstrong New Orleans International Airport opened a new 972,000 square-foot facility in 2019. This new, world-class terminal complex replaces the old facility and brings with it a ton of local food, beverage, news, gift and specialty retail options to bring more of New Orleans into the airport for visitors and locals alike to enjoy. The Hilton New Orleans Riverside is approximately 15 miles from the airport.

## **Ground Transportation**

*Please visit [claimseducationconference.net](http://claimseducationconference.net) for the most up to date information and rates*

## **Airport Shuttle**

We have partnered with Airport Shuttle to provide a discount to attendees of the Claims Education Conference. The website link to make reservations for either round-trip from the airport to the Hilton New Orleans Riverside (\$40) or one-way (\$20), is available on our website. In order to receive the discount, reservations must be made using the link on our website. Go to [claimseducationconference.net](http://claimseducationconference.net), click on “Venue and Travel” and choose “Transportation Information” to access the link.

## **Taxi**

A taxi ride costs approximately \$36.00 from the airport to the Hilton New Orleans Riverside for one or two persons and \$15.00 (per passenger) for three or more passengers. Pick-up is outside of Level 1 Baggage Claim Door 7. There may be an additional charge for extra baggage. Taxis are required to offer a credit card payment option.

## **Uber and Lyft**

Uber and Lyft are both available at the new airport. Lyft picks up outside of doors 7-9 and Uber picks up outside of doors 9-11. For more information visit [flymsy.com](http://flymsy.com).

## **Rental Cars**

Alamo, Avis, Budget, Dollar, Enterprise, Hertz, National, Payless and Thrifty are all represented at the New Orleans International Airport.



# Registration

## Conference Registration Fee:

On or before December 31, 2022: \$1,195

On or before March 31, 2023: \$1,295

After March 31, 2023: \$1,495

## \*Conference Guest Pass:

\$175 includes breakfasts, lunch, opening reception and the AEI Designation Conferment (if attending conference with a designee).

Guests can sign up for the activities below separately and do not need to register as a conference guest to do so.

\*The guest pass is intended for non-industry guests only.

## Conference Guest Pass for AEI Designation Conferment Only:

\$50 (includes AEI Designation Conferment Reception and Ceremony on Wednesday, May 3rd).



**Group Dinner:** Each participant is responsible for the payment of their meal and gratuity.

**Airboat Adventures Tour:** \$90 per person, includes transport from the hotel.

**New Orleans Cooking Experience:** \$165 per person includes personalized instruction, Authentic New Orleans meal, recipe cards, a New Orleans School of Cooking apron, and house wine or a local brewed beer. The school is located less than a mile from the hotel and is about a 15-minute walk.

**Dinner Jazz Cruise on the Creole Queen Riverboat:** \$90 including buffet dinner, \$50 for cruise only

## How to Register

Visit our website at [claimseducationconference.net](http://claimseducationconference.net) and click on the Register button or call Lisa at 612-868-3650 or email her at [lisa@insuranceinstitute.com](mailto:lisa@insuranceinstitute.com).

# Why Sponsor and Exhibit at the Claims Education Conference?

We know that there are many conferences and organizations in the insurance and claims industry competing for your time and money; so why should you sponsor or exhibit at our conference?

- Our conference delivers decision-makers. At our conference, nearly 40% of the conference attendees are at the management level.
- We take care of our sponsors and exhibitors. Is there someone on the roster you want to meet? No problem – just let one of our staff know, and we'll do everything we can to arrange an introduction.
- The majority of our social and networking events take place in the exhibit hall giving you ample time to mix, mingle and create new business relationships.
- The Claims Education Conference is fun! We serve daiquiris and hold a prize drawing in the exhibit hall – our attendees want to be there.
- Nearly 80% of our exhibitors and sponsors return year after year – those numbers speak volumes!

Whether you are new to the Claims Education Conference, or one of our old friends, we hope you will consider joining us in New Orleans May 2-5, 2023!





# Inspection Connection



Our team is comprised of experts on personal passenger auto, business auto, commercial vehicles, heavy trucks and equipment, agricultural and forestry equipment, recreational vehicles, motorcycles, and other "toys".

## SERVICE OFFERINGS:

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# Exhibit And Sponsorship Opportunities

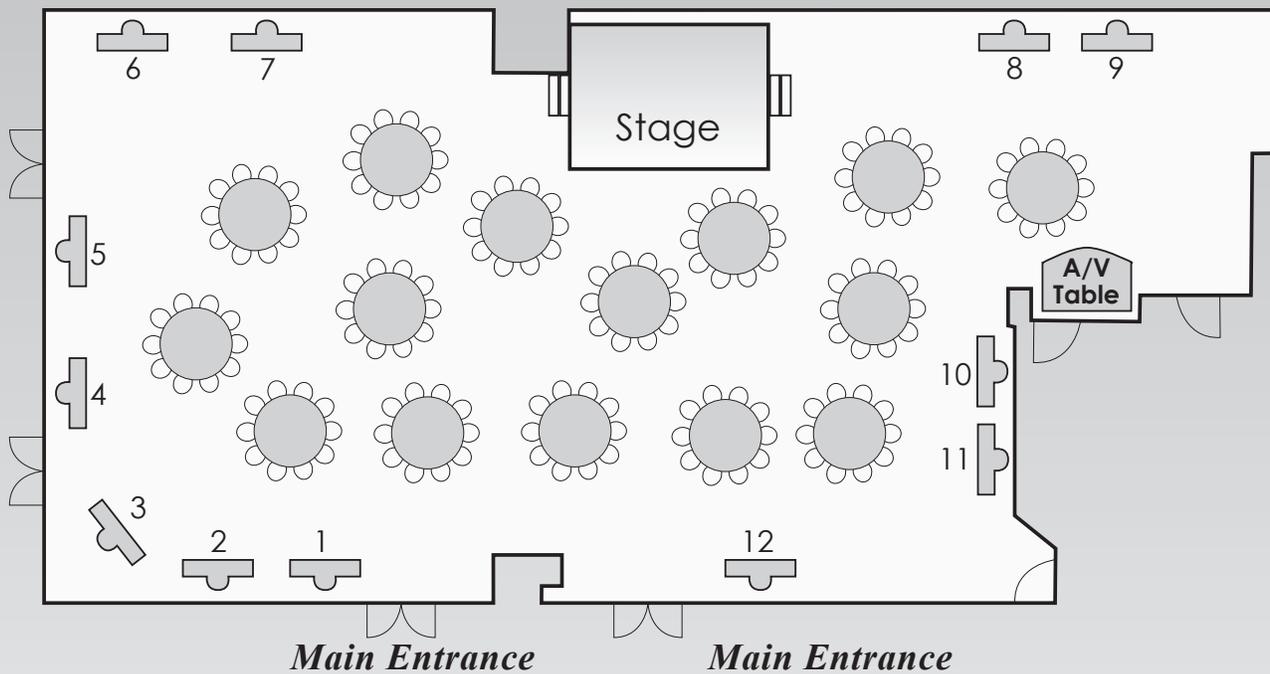
## Exhibit Opportunities

Get your products and services in front of key industry professionals by reserving an exhibit space. All conference meals will take place in the exhibit hall as well as the popular opening reception allowing for plenty of time to promote your business and network with attendees.

**\*SAVE \$100 OFF EXHIBIT FEES IF YOU SIGN UP BY MARCH 31st!**

**EXHIBIT SPACE - \$1,795\*** includes one exhibit space with a 6-foot draped table, one conference registration (1 person from the exhibiting company allowed in the exhibit hall and can attend sessions), up to one additional representative for \$250, and post-conference attendee list. Additional personnel must register separately and pay full registration fee. (Note: Exhibit space is limited and subject to availability).

### *Views of the Mississippi River*



# Exhibit Hall Activities



## Tuesday, May 2, 2023

2:00 p.m. – 6:00 p.m. – Exhibit Hall Set-Up

6:00 p.m. – 7:00 p.m. – Opening Reception



## Wednesday, May 3, 2023

7:30 a.m. – 8:30 a.m. – Breakfast

8:30 a.m. – 9:00 a.m. – Opening Comments

10:15 a.m. – 10:45 a.m. – AM Break

12:00 p.m. – 1:15 p.m. – Lunch and Presentation

2:30 p.m. – 3:00 p.m. – PM Break



## Thursday, May 4, 2023

7:30 a.m. – 8:30 a.m. – Breakfast

9:45 a.m. – 10:15 a.m. – AM Break

10:15 a.m. – Prize Drawing

10:30 a.m. – Exhibitor Tear Down



# SPONSORSHIP OPPORTUNITIES

## Diamond Sponsorship \$50,000

Your company name listed as Diamond Sponsor on all pre-conference marketing materials including:

- All e-blasts about the conference to III's subscription list of 24,000 (sent once per month)
- Front page of conference brochure
- All ads in Claims Education Magazine (quarterly)
- All ads about the conference placed in other magazines and periodicals
- All single page flyers handed out at all III training classes (4,500 students per year)
- All single page flyers handed out at public speaking events at other claims conferences (7,500 attendees per year)
- All single page flyers sent to III customers when ordering catalogs
- All single page flyers sent to III customers purchasing any books from [www.ClaimsProfessionalBooks.com](http://www.ClaimsProfessionalBooks.com)
- All single page flyers sent to III customers purchasing any videos from [www.ClaimsEducationOnLine.com](http://www.ClaimsEducationOnLine.com)



# SPONSORSHIP OPPORTUNITIES

## *Diamond Sponsorship Continued*

Your company name listed as Diamond Sponsor on various pages of the official website [www.ClaimsEducationConference.net](http://www.ClaimsEducationConference.net) including:

- Main Home page
- Both the Sponsors and Exhibitors sections with extended company description
- All registration pages
- All seminar descriptions
- All activities descriptions
- All agenda descriptions
- All suggested restaurants descriptions
- Inclusion in the “Why CEC?” page
- Inclusion in the “About Conference” page

Your company name listed as Diamond Sponsor on all on-site conference materials including:

- Front and back cover pages of conference program
- Conference bag
- Conference binders
- All conference session handouts
- All signage throughout entire conference

Your Diamond sponsorship also includes:

- Full page ad in Claims Education Magazine for four issues
- Full page ad in conference program
- Three complimentary registrations for your company personnel
- Five VIP passes for free registration to give to your top customers
- VIP registration code that you can give to all your customers for 20% off of registration fees – just for being your customer
- Verbal recognition during opening comments of the conference
- 20 complimentary drink tickets for your staff or customers at the opening reception
- Four CEC polo shirts for your company attendees
- 10 assorted sizes of CEC polo shirts to give to your customers
- 6-foot table top exhibit space



# SPONSORSHIP OPPORTUNITIES

## Gold Sponsorship \$25,000

Your company name listed as Gold Sponsor on some pre-conference marketing materials including:

- Inside page of conference brochure
- All e-blasts about the conference to III's subscription list of 24,000 (sent once per month)

Your company name listed as Gold Sponsor on various pages of the official website [www.ClaimsEducationConference.net](http://www.ClaimsEducationConference.net) including:

- Both the Sponsors and Exhibitors sections with extended company description

Your company name listed as Gold Sponsor on some on-site conference materials including:

- Inside page of conference program
- Various signage throughout entire conference

Your Gold Sponsorship also includes:

- ½ page ad in conference program
- ½ page ad in Claims Education Magazine for four issues
- Two complimentary registrations for your company personnel
- Two VIP passes for free registration to give to your top customers
- VIP registration code that you can give to all your customers for 10% off of registration fees – just for being your customer
- Two CEC polo shirts for your company attendees
- Five assorted sizes of CEC polo shirts to give to your customers
- Verbal recognition during opening comments of the conference
- Ten complimentary drink tickets for your staff or customers at the opening reception
- 6-foot table top exhibit space



# SPONSORSHIP OPPORTUNITIES

## Silver Sponsorship \$5,000

Your company name listed as Silver Sponsor on some pre-conference marketing materials including:

- Inside page of conference brochure
- All e-blasts about the conference to III's subscription list of 24,000 (sent once per month)

Your company name listed as Silver Sponsor on various pages of the official website [www.ClaimsEducationConference.net](http://www.ClaimsEducationConference.net) including:

- Both the Sponsors and Exhibitors sections with extended company description

Your company name listed as Silver Sponsor on some on-site conference materials including:

- Inside page of conference program

Your Silver Sponsorship also includes:

- ¼ page ad in Claims Education Magazine for four issues
- ¼ page ad in conference program
- One complimentary registration for your company personnel
- One VIP pass for free registration to give to your top customer
- VIP registration code that you can give to all your customers for 5% off of registration fees – just for being your customer
- One CEC polo shirt for your company attendee
- Two assorted sizes of CEC polo shirts to give to your customers
- Verbal recognition during opening comments of the conference
- Five complimentary drink tickets for the welcome reception
- 6-foot table top exhibit space



# SPONSORSHIP OPPORTUNITIES

## EVENT SPONSORSHIPS

All Sponsorships below include one complimentary registration to the conference and a 6 foot table top exhibit space.

**WEDNESDAY LUNCH: \$2,000**

Sponsor will be recognized with signage.

**OPENING RECEPTION SPONSOR: \$2,500**

Sponsor will be recognized with signage and on drink ticket that will be given to all attendees.

**WEDNESDAY, THURSDAY OR FRIDAY BREAKFAST: \$2,000**

What better way to start the day than with a wholesome breakfast!

Sponsor will be recognized with signage.

## ADVERTISING OPPORTUNITIES

Get noticed at the 2023 Claims Education Conference by advertising in our onsite program. This includes your ad in the next four issues of Claims Education Magazine ([www.ClaimsEducationMagazine.com](http://www.ClaimsEducationMagazine.com)) with a 24,000 subscription base.

Full color – ¼ page ad: \$1,250

Full color – half page ad: \$2,000

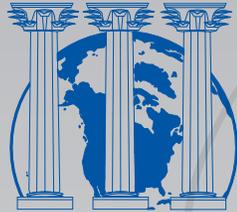
Full color – full page ad: \$3,000



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