AGENDA

Legend: White (All Attendees) Tan (Property & Casualty) Blue (Life & Health)

7:30 – 9:00 a.m.	**Registration** **Breakfast Buffet**	*Lobby* *Room 108*
9:00 – 9:15 a.m.	**General Session – Introduction and Welcome** *Rebecca Matthews, Chief of Staff* *Kevin M. McCarty, Insurance Commissioner*	*Room 108* *Webcast*
9:15 – 9:45 a.m.	**Trade Secret Presentation** *Virginia Christy, Chief Assistant General Counsel* Learn how to identify and protect trade secret material submitted to the Office. This presentation offers an overview of the responsibilities of both the Office and the industry regarding proprietary, confidential and trade secret material.	*Room 108* *Webcast*
9:45 – 9:55 a.m.	**Break (beverages available)**	*Second Floor*
9:55 – 10:40 a.m.	**Company Admissions (i-Apply)** *Robert Ridenour, Area Financial Manager,* *Business Development & Applications Coordination* Learn about new features available within the Office's iApply system, an electronic application program for new and existing insurers. More specifically, find out more information about reporting divestitures, rebutting a presumption of control and the new threshold for reporting an acquisition, etc.	*Room 114* *Webcast*

9:55 – 10:40 a.m.	**Rate & Form Filing Statistics/Legislative Changes** *Sandra Starnes, Director of Property & Casualty Product Review* An informative session designed to give attendees a better understanding of the process for reviewing rate & form filings along with a discussion of pertinent legislation.	*Room 103* *Webcast*
	Rate Filing Reviews *Linda Ziegler, Actuary, Rates* *Dalora Schafer, Financial Administrator, Rates* Acquire greater knowledge of the procedure for completing a Rate Filing, including components of an Actuarial Memorandum, the different rate review considerations for a low frequency vs. a high frequency product, common problems that can be avoided in rate submissions, and standard exhibits needed to review a rate filing.	*Room 214* *Webcast*
	Form Filing Reviews *Teresa Howell, Health Forms Analyst Supervisor* *James Dunn, Government Analyst II, Health Forms* *Tiffany Nelsen, Government Analyst II, Health Forms* *Jim Walker, Life Forms Analyst Supervisor* Avoiding common filing errors/issues prior to submission encourages a positive review process for both the Office and industry. Highlights include: required filing content, what is expected in a cover letter, the importance of selecting the correct line of business, and other mistakes that can easily by avoided.	*Room 205* *Webcast*
10:30 - 11:00 a.m.	**Financial Oversight Meet and Greet** *David Altmaier, Director of Property & Casualty Financial Oversight and Staff* *Carolyn Morgan, Director of Life & Health Financial Oversight and Staff* Take advantage of this opportunity to meet members of the Financial Oversight team.	*Room 101*
10:40 – 10:50 a.m.	**Break (beverages available)**	*Second Floor*

10:50 – 11:20 a.m.

Commercial Rate Filings & Rate Collection System/ Commercial Property & Medical Malpractice — *Room 114, Webcast*

Joe Boor, Actuary
Peggy Cheng, Actuary

A specialized review of the rate filing procedures from the perspective of both commercial residential property & medical malpractice lines of insurance. A brief summary of the problems encountered most often in House Bill 99 lines passed during the 2011 legislative session and other information only lines will be included. Attend this presentation to learn how this affects your company.

Homeowners & Dwelling/Fire Rate Filings & Rate Collection System — *Room 103, Webcast*

Bob Lee, Actuary
Kayne Smith, Actuary

Navigate the rate filing and rate collection system like a pro while avoiding common errors that can lead to time-consuming delays or disapproval.

Private Passenger Auto Rate Filings & Rate Collection System — *Room 205, Webcast*

Howard Eagelfeld, Actuary
Casey Tozzi, Actuary

Learn the basic concepts of how to use the Office's rate collection system along with ways to ensure your submission includes the necessary documentation to support the filing.

Name Changes/Mergers/Assumptions, etc. — *Room 214, Webcast*

Betty Jo Pate, Deputy Director of Health Forms
Paul Johns, Deputy Director of Life & Health Financial Oversight

Discuss the information needed when filing name changes, mergers, and assumptions and when discontinuing a specific form(s) or line of business.

11:20 – 11:30 a.m. **Break (beverages available)** — *Second Floor*

11:30 a.m. - Noon

Forms Presentation *Room 103*
Richard Koon, Deputy Commissioner, Property & Casualty *Webcast*

Gain insight about how to effectively communicate with regulators during the entire life cycle of a filing, including advice on how to improve speed, efficiency, and reduce workload for industry representatives making the filing.

I-File Overview — Property & Casualty Room 114
Jennifer Schul, Deputy Director of Property & Casualty Product Review *Webcast*
Michelle Brewer, Deputy Director of Property & Casualty Product Review

During this session, Office experts will walk you through a technical demonstration of I-File and highlight common errors that create submission filing problems.

I-File Overview — Life & Health *Room 205*
Austin Noll, Systems Project Administrator *Webcast*
Dalora Schafer, Financial Administrator, Rates
Betty Jo Pate, Deputy Director of Health Forms

During this session, Office experts will walk you through a technical demonstration of I-File and highlight common errors that create submission filing problems.

Senate Bill 1308 — Insurer Solvency *Room 214*
David Altmaier, Director of Property & Casualty Financial Oversight *Webcast*
Eric Johnson, Deputy Director of Life & Health Actuarial

A discussion on changes to the Holding Company annual filing and Risk Based Capital requirements. It will also include a status update on Principle Based Reserving which will include a brief discussion of Florida's new supplemental captive filings.

12:00 – 1:30 p.m.	**Lunch** *Keynote Speaker – George Dale, former Mississippi Insurance Commissioner and current Senior Public Policy Advisor at Baker Donelson*	*Room 208* *Webcast*

1:45 – 2:30 p.m.

Property & Casualty Rates — Roundtable Q&A

Have questions regarding the property and casualty rate filing process and want to ask the experts? Get your questions answered during these interactive forums between the Office's Property & Casualty staff members and attendees.

Commercial Property & Medical Malpractice *Joe Boor, Actuary* *Peggy Cheng, Actuary*	*Room 114* *Webcast*
Homeowners & Dwelling/Fire *Bob Lee, Actuary* *Kayne Smith, Actuary*	*Room 103* *Webcast*
Automobile *Howard Eagelfeld, Actuary* *Casey Tozzi, Actuary*	*Room 101* *Webcast*

Senior Issues (Medicare Supplement/Long Term Care) *Debbie Williams, Government Analyst II, Health Forms* *Linda Ziegler, Actuary, Rates* *Eric Johnson, Deputy Director of Life & Health Actuarial* *Chris Struk, Deputy Director of Life & Specialty Forms*	*Room 205* *Webcast*

This will include a discussion of filing preparation issues unique to Medicare Supplement, including the Medicare Supplement Rate Collection System, Medicare Supplement Refund/Credit Calculation reports, advertisements, and form requirements. The goal of this presentation is to share common obstacles that will prevent filings from being successfully reviewed and provide key examples that will increase speed to market.

1:45 – 2:30 p.m.

Life & Annuities — *Room 214* — *Webcast*

Jim Walker, Life Forms Analyst Supervisor
Dalora Schafer, Financial Administrator, Rates

This session will allow participants to acquire greater knowledge concerning specific areas of concern for life and annuity form filings and include an overview of recent legislative changes, viatical and Stranger-Originated Life Insurance (STOLI) filings and the Multi-State Review Program (MSRP).

2:30 – 2:45 p.m. **Break (snacks and beverages available)** — *Second Floor*

2:45 – 4:00 p.m.

Property & Casualty Forms - Roundtable Q&A — *Room 108* — *Webcast*

Richard Koon, Deputy Commissioner, Property & Casualty
Anne Ivory, Forms Supervisor
Veronica Myles, Commercial Forms Supervisor
George Feijoo, Private Passenger Auto Supervisor

Have questions regarding the property and casualty form filing process and want to ask the experts? Get your questions answered during this interactive forum between the Office's Property & Casualty staff members and attendees.

ACA Update/Life & Health Product Review Roundtable Q&A — *Room 103* — *Webcast*

Richard Robleto, Deputy Commissioner, Life & Health
Jack McDermott, Director of Life & Health Product Review
Eric Johnson, Deputy Director of Life & Health Actuarial
Linda Ziegler, Actuary, Rates
Dalora Schafer, Financial Administrator, Rates
Benjamin Ben, Senior Actuarial Analyst, Rates
Betty Jo Pate, Deputy Director of Health Forms
Chris Struk, Deputy Director of Life & Specialty Forms

A brief update on the status of the ACA (Affordable Care Act) marketplace and changes expected for 2015. This will also be an opportunity for discussion of other life and health issues not covered elsewhere in the conference, including time for questions and answers.

Conference Concludes