



Ole Miss Insurance Symposium 2010 Program

Wednesday, March 24

All Educational Sessions at The Inn at Ole Miss

1:30-4:15 p.m. Early Bird Continuing Education Sessions (3 hours credit)

1:30-2:45 p.m. Section A: Property-Casualty Agency Issues

Introduction: Charlene Smith, Marketing Representative, Union Standard Insurance Group, Meridian, Mississippi

Selling and the Shift to Risk Management—Part I

Thomas G. Quaka, CPCU, Senior Vice President
FCCI Insurance Group
Jackson, Mississippi

Gertrude Ford Ballroom

Section B: Life-Health Planning Issues

Introduction: Ike Trotter, CLU, ChFC, President, Ike Trotter Agency, LLC, Greenville, Mississippi

Legacy Planning and Defined Benefit Plans

Ronald Kyzar, Registered Representative
Ameritas Investment Corporation
Clinton, Mississippi

McMillan Board Room

2:45-3:00 Refreshment Break

3:00-4:15 p.m. Section A: Property-Casualty Agency Issues

Selling and the Shift to Risk Management—Part II

Thomas G. Quaka, CPCU, Senior Vice President
FCCI Group
Jackson, Mississippi

Gertrude Ford Ballroom

Wednesday, March 24 (cont'd)

3:00-4:15 p.m. Section B: Life-Health Planning Issues

Introduction: Ike Trotter, CLU, ChFC, President, Ike Trotter Agency, LLC, Greenville, Mississippi

The Facts Will Set You Free
Common Sense Is the Name of the Game

Michael M. Anderson, CLU, Principal
Anderson Insurance
Indianola, Mississippi
McMillan Board Room

6:30 p.m. Ole Miss Baseball vs. Saint Louis University

Oxford University Stadium – Bullpen Club Tent

7:00-10:00 p.m. Opening Reception

Oxford-University Club
265 North Lamar Boulevard (just north of the Courthouse Square)
Sponsored by Webb, Sanders, & Williams, P.L.L.C.

Thursday, March 25

All Sessions at The Inn at Ole Miss

7:30-8:10 a.m. Registration & Continental Breakfast

8:10-8:30 a.m. Welcome Session

Dr. Ken Cyree, Dean, School of Business Administration, The University of Mississippi, University, Mississippi

Hon. Mike Chaney, Commissioner, Mississippi Insurance Department, Jackson, Mississippi

Gertrude Ford Ballroom

8:30-9:20 a.m. Trends in Agency and Brokerage Operation (1 hour credit)

Introduction: Kent Edgecombe, Area President, Arthur J. Gallagher Risk Management Services, Inc., Ridgeland, Mississippi

J. Patrick Gallagher, Jr., Chairman, President, and CEO
Arthur J. Gallagher & Company
Itasca, Illinois

Gertrude Ford Ballroom

9:20-9:30 a.m. Refreshment Break

Thursday, March 25 (cont'd)

9:30-10:20 a.m. Insurance Markets: An Industry in Transition (1 hour credit)

Introduction: Ronald P. Tubertini, CIC, President and CEO, SouthGroup Insurance and Financial Services, Inc., Jackson, Mississippi

Robert P. Restrepo, Jr., Chairman, President, and CEO
The State Auto Insurance Group
Columbus, Ohio

Gertrude Ford Ballroom

10:20-10:30 a.m. Refreshment Break

10:30-11:20 a.m. Developments in the E&S and Specialty Lines Industry (1 hour credit)

Introduction: Preston H. Gough, Jr., President, Southern Cross Underwriters, Inc., Jackson, Mississippi

Michael D. Miller, President and COO
Scottsdale Insurance Group
Scottsdale, Arizona

Gertrude Ford Ballroom

10:30-11:20 a.m. Retirement Cash Flow Planning and Investment Selection Strategies (1 hour credit)

Introduction: Aaron Jussely, Ole Miss Student

Dudley M. Barnes, CFP, Principal
Barnes-Petty Financial Advisors
Clarksdale, Mississippi

McMillan Board Room

11:20-11:30 a.m. Refreshment Break

11:30 a.m.-12:20 p.m. Insurance Markets: A Regional View (1 hour credit)

Introduction: Mike Breedlove, President and COO, W.S. Pharr & Co., Atlanta, Georgia

Michael J. Plavnicky, President and CEO
Montgomery Mutual Insurance Company
Charlotte, North Carolina

Gertrude Ford Ballroom

11:30 a.m.-12:20 p.m. Planning for Long-Term Care (1 hour credit)

Introduction: Jacque Chamblee, Ole Miss Student

Richard G. Barnes, Jr., CLU, ChFC, CFP, Registered Principal
LPL Financial
Ridgeland, Mississippi

McMillan Board Room

Thursday, March 25 (cont'd)

12:20-1:50 p.m. Luncheon with Special Guest Speaker

Recognitions and Awards
Special Guest Speaker: Houston D. Nutt, Head Football Coach
The University of Mississippi

Gertrude Ford Ballroom

1:50-2:40 p.m. Worker's Compensation in a Challenging Economy (1 hour credit)

Introduction: John P. Wells, Rating Director, Mississippi Insurance Department, Jackson,
Mississippi

Stephen J. Klingel, CPCU, President & CEO
NCCI Holdings, Inc.
Boca Raton, Florida

Gertrude Ford Ballroom

1:50-2:40 p.m. Helping Agents and Advisors Educate Consumers about the Need for Life Insurance as Part of a Sound Financial Plan (1 hour credit)

Introduction: Cade Clanton, Ole Miss Student

Jack Dewald, CLU, RHU, Chairman
LIFE Foundation
Arlington, Virginia

McMillan Board Room

2:40-2:50 p.m. Refreshment Break

2:50-3:40 p.m. National Political and Legal Developments Affecting the Insurance Industry (1 hour credit)

Introduction: Chris Boone, Chairman, Independent Insurance Agents of Mississippi,
Flowood, Mississippi

J. David Daniel, Chairman
Independent Insurance Agents and Brokers of America
Alexandria, Virginia

3:40 p.m. Concluding Remarks and Door Prizes