

# OIAA 2016 Professional Development & Claims Conference Seminars

## ADJUSTER EDUCATION IS OUR PRIORITY

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### SEMINAR

# A

## ***Accident Benefits: Just when you think you've got it...***

**Presented by Kadey BJ Schultz, LL.B., LL.M., Partner, Schultz Frost LLP**

Join us for a lively seminar focusing on the regulatory and dispute resolution process changes, important case law and strategic tips to weather the changes ahead.



### **Kadey B.J. Schultz, LL.B., LL.M.**

*Kadey is a partner at Schultz Frost LLP and is a recognized expert in the field of motor vehicle litigation in Ontario. While most known for her Statutory Accident Benefits practice, including first party disputes, priority and loss transfer arbitrations, and conflicts arising from the interaction between the SABS and WSIB, she also defends complex liability cases. Kadey is actively involved in teaching, publishing and litigation.*

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### SEMINAR

# B

## ***Business Interruption from the Adjuster's Perspective***

**Presented by Drew Bailey, ACILA, CIP, FIFAA, B.Comm., Claimspro Adjusters**

This presentation is intended to introduce and familiarize adjusters with the investigation and assessment of commercial business interruption losses within the scope of an adjuster's role and perspective. The presentation will assist adjusters in analyzing the information presented in accountant's reports in order to facilitate the negotiation of settlement. In addition, we will encourage and educate adjusters to undertake their own business interruption assessment of non-complex small to mid-sized losses.



### **Drew Bailey, ACILA, CIP, FIFAA, B.Comm**

*Drew Bailey currently is employed with Claimspro Adjusters in London Ontario as a Chartered Loss Adjuster in the Special Risk Division. Drew has a Bachelor of Commerce (Honours) Degree from the University of Manitoba majoring in Actuarial Mathematics. He has been adjusting claims for over 25 years and is considered an industry expert in complex commercial losses with a specialty in business interruption claims. He has handled losses Alberta, British Columbia, Saskatchewan, Manitoba, and Ontario.*

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### SEMINAR

# C

## ***Leveraging Social Media to Enhance your Professional Brand***

**Presented by Amanda Bortolus, Hons. B.A. CRM, Crawford and Company**

With the ever-increasing popularity of social media networks and online communities, the modern professional's online presence acts as an integral part of their overall professional reputation. In this seminar, the claims professional will learn to develop a professional brand and brand mantra, review the use and function of social media platforms such as LinkedIn and Twitter, and gain insight to solidify their professional online presence.



### **Amanda Bortolus, Hons. B.A. CRM**

*Amanda has more than 7 years of experience that extends from program management, claims handling to the marketing of professional insurance services. She is currently employed by at Crawford & Company (Canada) Inc. in the role of Marketing Director, overseeing the marketing and communication functions in the organization. Amanda acts as a social media coach to various insurance professionals and c-suite executives.*

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### SEMINAR

# D

## **Ethics: As adjusters what, if anything, do we owe and to whom?**

**Presented by Keith Edwards FCILA, CLA, FUEDI-ELAE, Senior Vice President, Training and Development, SCM Insurance Services**

So what is an adjuster to do? What moral or ethical obligation is owed? How does this vary from the legal obligation owed? How should we deal with conflicting and contradictory expectations? In this presentation, claims professionals will hear helpful tips on how to balance the increased demands of customer service with the inherent need to uphold the integrity of the policy, defend our actions and determinations and avoid bad faith claims, claims against the Unfair or Deceptive Acts or Practices, and what current case law has to say about it all.



### **Keith Edwards, FCILA, CLA, FUEDI-ELAE**

*Keith Edwards is Senior Vice President and Privacy Officer at SCM Insurance Services. A Fellow of the Chartered Institute of Loss Adjusters he has been adjusting claims for 45 years. He is past president of the Canadian Independent Adjusters Association, a private pilot and a part time travel writer for Homefront Magazine. He is also a Board Member of Canada Cares and the Canada Abilities Foundation. He has a particular interest in promoting high standards in the profession.*

### SEMINAR

# E

## **Statutory Conditions & Property Loss Adjustments: What the Claims Professional Needs to Know**

**Presented by Geoff Sullivan, CIP, CFEI, CFE, CCFI-C, Michael Jobson, CIP, and Philippe Pagé, L.L.L, CIP, Cunningham Lindsay**

This seminar will assist as a refresher or educate the claims professional on the limitations, conditions and requirements of both parties as laid out and agreed to in the contract of insurance. This seminar is a back to basics which will appear to all levels of experience.



### **Geoff Sullivan, CIP, CFEI, CFE, CCFI-C**

*Geoff has over 26 years of adjusting experience and he has handled large major losses for a many industry sectors including Industrial Property, Agriculture and Food, Building and Construction, Mining, and Marine and Transportation. His expertise lies in handling lumber, forestry, equipment and processing, course of construction/builders' risk, boiler and machinery, pulp and paper, business interruption, environmental pollution, and liability claims.*



### **Michael Jobson, CIP**

*Michael currently works for Cunningham Lindsey, and has been an independent insurance adjuster since 1991. His experience includes 5 years as a Branch Manager and years handling a wide variety of losses including commercial property, liability, business interruption, heavy equipment, boiler machinery, wrap up liability, course of construction, marine and cargo claims. Michael has been called on by a number of insurers to assist on large commercial losses, and also specializes in contentious and difficult claims adjustments.*



### **Philippe Pagé, L.L.L, CIP**

*Mtre Philippe Pagé began his career as an insurance and civil trial lawyer in 1980 and obtained the CIP certification in 1987. He was issued his AMF Claims adjusting certificate in 2009. He joined the Cunningham Lindsey team in April 2012 and has since worked as a claims adjuster. Phillippe's specialities include General Liability, product liability, construction liability, professional liability, E&O and D&O Liability and Bond, fidelity and dishonesty claims.*

## SEMINAR

# F

### **Casualty Update: A Year in Review**

Presented by **Ian Gold, LL.B. and Adam Bucci, B.A. (Hons), J.D., Thomas Gold Pettingill LLP**

Ontario courts have rendered a number of important decisions over the past year on a variety of casualty-related issues. Regardless of your background in the insurance industry, we trust that you will find our review of the most important decisions of 2015 to be informative and helpful.



#### **Ian Gold, LL.B.**

*Ian Gold is a founding partner in Thomas Gold Pettingill LLP. He is a skillful civil and commercial litigator having extensive trial experience with judges and juries. His practice spans all fields but emphasizes complex insurance litigation. Ian has handled all matters of insurance and insurance coverage cases on behalf of policyholders and insurers including professional malpractice, property and casualty claims, class actions, and environmental litigation.*



#### **Adam Bucci, B.A. (Hons), J.D.**

*Adam is an associated at Thomas Gold Pettingill, LLP. He joined the firm in 2013 and works primarily in the insurance defence group working on motor vehicle, property, casualty and liability claims. Adam attended Osgoode Hall Law School, where he obtained his J.D. in 2011. He was called to the Ontario bar in 2012.*

## SEMINAR

# G

### **The Advantage of Mentoring**

Presented by **Margaret Parent, Director, Professionals' Division, Insurance Institute of Canada**

Mentoring helps to build skills and accelerate learning, transfer knowledge, enhance professional ethics, broaden scope and awareness of issues and implications, and guide critical thinking and decision-making. In this presentation, Margaret will talk about the benefits of forming effective mentoring relationships, what it means to be a successful mentor and mentee, the importance of setting SMART goals for mentoring relationships, and the tools and resources for mentors, mentees and organizations that are available.



#### **Margaret Parent**

*Margaret has more than 25 years of experience as a Communications professional working predominantly within professional associations/membership organizations. Margaret joined the Institute in 2005 as Director of the Professionals' Division with responsibilities for the CIP Society, Career Connections, and the Institute's Research division. Margaret is pleased to present on the importance of mentoring in addressing the industry's retention issues.*

## SEMINAR

# H

### **Desk top Investigations: How to get the most out of internet searches.**

Presented by **Anthony Kunkle of Mitchell Partners Investigations**

A multimedia presentation providing practical, useable methods and tactics for finding information on the internet quickly and efficiently, including useful free sources of information and shortcuts for the searches we do every day.



#### **Anthony Kunkle**

*Anthony Kunkel is General Manager and co-founder of Mitchell Partners Investigation Services. A graduate of Sheridan College in 1986, Anthony began his investigations career working undercover in industrial settings and conducting surveillance for corporate, WSIB and insurance clients. In 1989 Anthony joined Mitchell & Associates as an investigator and manager, and in 1995 was offered a partnership, when Mitchell Partners was formed. In the 20 years since, Mitchell Partners has grown to become one of Ontario's premier investigation agencies.*

## SEMINAR

# I

### **Fatal Damage Assessments**

Presented by **James E. Dunn, LL.B., Partner, Blouin Dunn LLP**

This presentation will take adjusters through the process of assessing the quantum of fatality claims and preparing reserve worksheets. The adjuster will learn about recent case law and awards as well as what defines an eligible claimant, pecuniary and non-pecuniary assessments, contingencies, possible deductions, and damages under the Trustee Act and negotiating tactics.



#### **James E. Dunn, LL.B.**

*James E. Dunn received his undergraduate degree at the University of Western Ontario and the University of Windsor. He obtained a Bachelor of Arts degree in Philosophy in 1973 and then attended the University of Windsor Law School where he obtained his LLB in 1976. He specializes in jury trial work in the Ontario Superior Court of Justice, as well as tort/BI work, rail-related claims, product liability, coverage dispute litigation and CGL cases. He has also appeared as counsel in the Ontario Court of Appeal and before various administrative tribunals, including FSCO.*