



# IIABNY's Capital Event<sup>'09</sup>

Grow. Connect. Influence.

**Dear IIABNY Member,**

Over the past few years, many members have voiced their desire for a formal gathering of agents and brokers for networking opportunities as well as professional development. However, at the same time, they expressed concern for time spent out of the office.

In an effort to make the most effective use of our members' time while also offering exceptional workshops and networking opportunities, we decided to build on the interest and the success of our annual Legislative Day (also known as L Day) which is the largest gathering of our members in the state and created **IIABNY's Capital Event**.

This expanded event will offer independent agents and brokers an experience they cannot obtain anywhere else in the state. Those who attend this conference will gain knowledge, insight, and networking opportunities that will have an immediate and positive impact on themselves and their agency.

Cutting edge workshops from leading speakers provide critical information and valuable insights that will help you grow your business and be more successful personally. They are for motivated agents looking to excel within their field, who will be able to take what they learn on Monday and turn it into sales opportunities on Wednesday. Although both workshops offer CE credit as an added benefit, the knowledge that you will walk away with is the primary advantage.

In addition to the workshops, attendees will have the opportunity to connect with individuals actively involved in the insurance industry. This networking is centered on a cocktail reception hosted by key Support New York insurance carriers and vendors which is followed by dinner, prestigious awards, and concludes with entertainment provided by Johnny Lampert, a nationally known comedian.

Capital Event attendees will also have the opportunity to lobby at the state capital and influence future legislation at L Day. This is your opportunity to meet directly with the legislators and discuss the association's legislative position. **YOUR VOICE COUNTS**. This past year, our lobbying efforts helped make NYPIUA permanent, reinstate flex rating, and changed the law to require carriers to show prejudice before denying a claim for late reporting.

We hope to see you in Albany, **February 2 -3, 2009** to experience the inaugural Capital Event. The rich traditions from the past have been woven into this new experience, so that IIABNY members and non-members alike can experience the best of the old and new. It will be new and exciting and a must-attend for the professional agent and broker who wants to be a leader in our industry.

See you in Albany!

Richard A. Poppa  
IIABNY President & CEO

Monday, February 2

Crowne Plaza

- 8:00 a.m. - 12:00 p.m. IABNY's Quarterly Board of Directors Meeting
- 1:00 p.m. - 7:00 p.m. Registration Open
- 2:00 p.m. - 5:00 p.m. "Agency Value: Hanging by a Thread" (2 CE Credits; All licenses; NYCR-216724)  
Patrick T. Linnert, Executive Vice President, Corporate Development, MarshBerry  
*or*  
"Get the Green Edge: How to Underwrite and Insure 'Green' Exposures & Grow Your Book" (3 CE Credits; PC, BR, C3, PA; NYCR-216725)  
Eileen Clinton, Risk Management Services, Brown & Brown Empire State  
*or*  
Company Forum (Company representatives only)
- 6:00 p.m. - 7:00 p.m. Reception \* Support New York Meet & Greet
- 7:00 p.m. - 10:00 p.m. Dinner  
Awards  
Entertainment provided by comedian Johnny Lampert

Tuesday, February 3

Convention Center, Empire State Plaza

- 8:30 a.m. - 9:30 a.m. L Day (Legislative Day) Registration
- 9:30 a.m. - 10:15 a.m. Briefing with Michael Barrett, IABNY's Legislative Representative
- 10:30 a.m. - 11:30 a.m. Individual member and local association visits to Legislators' offices
- 12:00 p.m. - 2:00 p.m. Luncheon (continuous buffet)

IABNY's  
Capital Event '09  
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Schedule of Events



# IIABNY's Capital Event '09

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Workshops

Monday, February 2<sup>nd</sup>

## “Agency Value – Hanging by a Thread”

2 CE Credits (All licenses); NYCRR-216724

### Who Should Attend:

Agency owners, principals and managers

### About the Program:

Designed for agency and brokerage principals and CEOs, this workshop will demonstrate how to create double digit organic growth and strengthen and grow your agency's value.

In this soft market, this is not an easy feat. Agencies that remain independent during the next four years must orchestrate organic growth in the high single digits with controlled investment to preserve current value on an after-tax basis. To strengthen after-tax value, organic growth must be near double digits!

Now is the time to make a commitment. Patrick Linnert, an expert from MarshBerry, will provide invaluable information and tools to grow organically despite current market conditions.

### Instructor:



**Patrick T. Linnert, Executive Vice President, Corporate Development, MarshBerry**

MarshBerry is a preeminent specialized consulting firm offering services exclusively in the insurance agency and brokerage field. Patrick Linnert joined MarshBerry in 2000 as a consultant responsible for the execution of valuations, succession plans, mergers & acquisitions and other equity enhancing projects.

In 2004 he spearheaded the development of MarshBerry's Corporate Development department. Patrick provides vision for MarshBerry's corporate direction and initiatives while continuing to execute consulting engagements with the nation's leading independent agencies, public brokers, banks, carriers, associations and vendors. He is a frequent speaker at insurance conferences and carrier, state and trade association functions. He has authored several articles for such publications as Rough Notes and Insurance Journal.

## “Get the Green Edge: How to Underwrite and Insure ‘Green’ Exposures & Grow Your Book”

3 CE Credits (PC, BR, C3, PA); NYCRR-216725

### Who Should Attend:

Producers, Account Executives

### About the Program

This unique workshop is not just for “tree huggers,” but is designed for producers of both commercial and personal insurance interested in capitalizing on the ‘green’ movement and growing their book of business in this softening market. As our mainstream society becomes more aware of the value of ‘green’ construction, it will become a common insurance need.

Attendees will learn the insurance exposures of ‘green’ construction, what LEED is and what it takes to be LEED certified, as well as how to insure everything from ‘green’ homes and cars to multi-million dollar ‘green’ projects.

This will give producers the knowledge and expertise to provide a unique service to their clients as well as discuss risks and competitive pricing strategies with insurance company underwriters.

### Instructor:



**Eileen Clinton, Vice President Risk Management Services, Brown & Brown Empire State**

This workshop will be taught by a team of leading experts in the field. Eileen Clinton, Vice President of Risk Management Services for Brown & Brown is a presenter of ‘green’ risk management seminars with the U.S. Green Building Council New York Upstate Chapter. She will be joined by Tracie Hall, Executive Director of the Upstate Chapter of the US Green Building Council and Kenneth Alweis of the law firm Goldberg Segalla LLP that specializes in handling contracts and claims involving ‘green’ exposures and LEED certification.

Eileen is accredited as a Chartered Property Casualty Underwriter, Advisor in Insurance, Associate in Claims, Certified Environmental Auditor, and Associate in Loss Control Management. Eileen is also a Registered Environmental Property Assessor as well as a Certified Workers' Compensation Safety and Loss Prevention Consultant.

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Evening Events

Monday, February 2<sup>nd</sup>

## Reception

Open bar ~ Hors d'oeuvres

*Support New York Meet & Greet:* An opportunity to meet and socialize with representatives from insurance companies, wholesalers, and other industry-related businesses.

## Dinner

Open bar ~ Dinner ~ Dessert

Host: IIABNY Chair of the Board Neal L. Sullivan, CPA

## Awards

- ✧ Outstanding Company Partners:  
National | Super Regional | Regional  
Based on results of the 2008 IIABNY Carrier Index Surveys.
- ✧ ACSR of the Year  
Acknowledges the crucial value that customer service representatives bring to the independent agency system and the millions of customers they serve.
- ✧ Joel S. Pollack Young Agent of the Year  
Presented to an agent under age forty who has displayed an outstanding commitment to their clients, their agency, and their industry.
- ✧ Trusted Choice® Agency of the Year  
Awarded to the agency or brokerage that embodies the Trusted Choice® brand and best exemplifies the Pledge of Performance.
- ✧ 1882 Fellow  
Recognizes the individual member who has most significantly contributed to IIABNY and their community. Selected by the IIABNY Executive Committee.

## Entertainment



### Comedian Johnny Lampert

Johnny Lampert is considered one of the premier comedians in the country. He is a regular at New York and LAs' best comedy clubs including The Comic Strip, Caroline's Comedy Club, and The Improv.

Johnny has also made numerous television appearances on MTV, A&E's Caroline's Comedy Hour, Comedy Central, NBC's Friday Night, and HBO Comedy Showcase.



# IIABNY's Capital Event '09

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Tuesday, February 3<sup>rd</sup>

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**Join hundreds of IIABNY members from throughout New York State as we impress upon our legislators the issues that are important to us as independent insurance agents and brokers as well as small business owners.**

## **What is "L" Day?**

IIABNY's annual "L" Day (Legislative Day) is your opportunity to discuss the association's legislative position with your legislators. Hundreds of independent insurance agents as well as company representatives gather at the state capital in Albany to lobby for the issues that are critical to the independent agency system.

## **Why Should I Get Involved?**

The legislative process works when you get involved. At "L" Day, you have a unique opportunity to meet directly with the legislators. Imagine the impact that will be made on the legislators when hundreds of independent agents and people involved in the industry visit them and educate them about the insurance industry and issues facing it. YOUR VOICE COUNTS and your presence at this important function has a tremendous impact on IIABNY's lobbying efforts throughout the year.

## **Is Anyone Coming From My Area?**

More than likely, yes! It is very important that the legislators see a turnout from every part of the state, especially yours!

## **What happens at "L" Day?**

The day begins with a briefing by Michael Barrett, IIABNY's Legislative Representative, on current legislative issues and distribution of materials that will assist in your discussions with legislators.

Then members go out in groups to visit the offices of their legislative representatives. Some groups choose the office visits to lobby their legislators, but most encourage their legislators to join them at the luncheon. The briefing and legislative position paper will enable you to speak with authority on the issues important to independent agents throughout New York State.

The real impact of "L" Day is the luncheon. Set up as a continuous buffet, it is an opportunity to talk with your legislators one on one, with no formal speeches or presentations planned. All members and their legislators are invited to be guests of IIABNY.

**REGISTRANT INFORMATION**

1. \_\_\_\_\_  
 Last Name                      First Name                      Designation(s)                      Nickname (for badge)

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\_\_\_\_\_

NYS License Number(s)                      Last 4 digits of Social Security #

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\_\_\_\_\_

Agency/Company Name                      Spouse/Guest Name

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\_\_\_\_\_

Street/Mailing Address                      (Area Code) Telephone No.

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\_\_\_\_\_

City/State/Zip                      E-mail Address

**REGISTRATION**

2. **Please select one of the following registration options:**

**Full Registration** includes a workshop of your choice, reception, dinner and L Day\*  
 Member: \$175 | Non-Member: \$250  
*Groups of 12 or more: \$150 per person for the full registration. Contact Monica Rayder to register as a group.*

Choose one:  
 "Agency Value: Hanging by a Thread"  
 "Get the Green Edge: How to Underwrite and Insure 'Green' Exposures & Grow Your Book"

Yes! I will attend L Day     Sorry, I will not attend L Day

**Workshop & L Day Only** includes a workshop of your choice and L Day\*  
 Member: \$90 | Non-Member: \$125

Choose one:  
 "Agency Value: Hanging by a Thread"  
 "Get the Green Edge: How to Underwrite and Insure 'Green' Exposures & Grow Your Book"

Yes! I will attend L Day     Sorry, I will not attend L Day

**Reception/Dinner & L Day Only** includes reception, dinner and L Day\*  
 Member: \$99 | Non-Member: \$145

Yes! I will attend L Day     Sorry, I will not attend L Day

**L Day Only**  
 \*L Day continues to be a complimentary event for IIABNY members and IIABNY supporters.

Please indicate any dietary restrictions \_\_\_\_\_

3. **Are you interested in group transportation (if available)?** \_\_\_\_\_  
 If so, what is your Local Association Affiliation \_\_\_\_\_

**PAYMENT METHOD**

4.  Check (made payable to IIABNY, Inc.)  
 American Express                       Master Card                       Visa  
 (check one)                       This is a business card                       This is a personal card

Amount of check \$ \_\_\_\_\_ Amount of Charge \$ \_\_\_\_\_ Card # \_\_\_\_\_

Expiration Date \_\_\_\_\_ Name on Card \_\_\_\_\_

Authorized Signature \_\_\_\_\_

**HOTEL**

A separate hotel room reservation form is enclosed, and it is your responsibility to make reservations d. Please note: there are only a limited number of rooms available. \*\*After 1/12, rooms are subject to availability \*\*

**CANCELLATION POLICY**

Cancellations must be in writing and received by IIABNY no later than 72 hours prior to the start of the conference to receive a full refund. Requests received with less than 72 hours notice will receive a 50% refund. No refund will be granted as of the date of the conference.

Please complete this registration form and return with full registration fee by January 26, 2009 to:  
 IIABNY, Inc., Attention Monica Rayder, 5784 Widewaters Pkwy, Dewitt, NY 13214  
 or fax it to 888-432-0510



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Hotel Reservation

**Crowne Plaza**

State & Lodge Streets, Albany, NY

Arrival: 02/02/09 | Departure: 02/03/09

Check-in: 4:00 p.m. | Check-out: 11:00 a.m.

Rate: \$139, plus tax per night | Hotel parking an additional \$8.00

**FAX THIS FORM DIRECTLY TO THE HOTEL - 518-462-8192**

There are a limited number of rooms reserved. Room reservations are on a first come, first serve basis.

Absolute deadline for reservations is January 12, 2009

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Full Name Company

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Street/Mailing Address

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Telephone No. Fax E-mail address

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Number of People in Room Roommate name (if sharing)

**All Major Credit Cards Accepted**

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Cardholder Name Type of Card

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Credit Card Number Expiration Date

Please check your preferred accommodations (preferences are subject to availability)

- King  Queen  2 Double Beds  
 Smoking  Non-smoking

If you wish to cancel, please do so by 6pm the day of arrival to avoid cancellation penalties. In accordance with the Americans with Disability Act, we invite you to notify us if you require any special assistance.

*Reservations are subject to availability. Any reservations received after January 12, 2009 will be handled on a space-availability basis only. All rates are quoted in U.S. dollars and do not include state and local taxes.*

