



Draft Agenda

Note: Conference Attendees Would qualify for 6 hours of Continuing Education

Friday – September 25th Helena Great Northern Hotel

8:00 - 8:30	Registration and Networking Breakfast
8:30 - 8:35	Welcome Jesse Laslovich – Chief Legal Counsel
8:35 – 9:00	The State of the State’s Insurance Industry Monica J. Lindeen – Montana Insurance Commissioner
9:00 – 9:25	The NAIC: Key Initiatives -- Now and in the Years to Come Monica J. Lindeen – Montana Insurance Commissioner
9:25 - 9:35	Session Break
9:35 – 10:00	Understanding Today’s Insurance Consumer – Market Trends and Analysis Speaker to be determined...
10:00 – 10:30	Topic to be determined...
10:30 - 11:00	“The Connector” Networking Break – Coffee and Conversation
11:00 – 11:30	The Affordable Care Act – Updates and Issues Christina Goe – CSI General Counsel
11:30 – 12:00	Emerging Insurance Issues – What Lies Ahead... Greg Dahl – Deputy Insurance Commissioner
12:00 – 12:25	Networking Lunch
12:25 – 12:50	The NAIC and State Regulatory Issues – Ongoing Efforts, Potential Problems and Upcoming Opportunities Ethan Sonnichsen -- NAIC Government Relations Director
12:50 – 1:20	Keynote Address – Topic to be Determined U.S. Senator Jon Tester Introduction by Monica J. Lindeen

1:20 – 1:30

Session Break

Set-up for breakout sessions

Producer Breakout Session No. 1

1:30 - 2:30

Ethics and the Montana Insurance Producer – Essential Information that You Need to Know

Jeannie Keller -- CSI Licensing Bureau Chief
Key Producer Representatives?

Producer Breakout Session No. 2

1:30 - 2:00

2015 Legislative Session Overview – Changes, Challenges and Concerns – Part 2

Jesse Laslovich – Chief Legal Counsel
Nick Manzanec – CSI Legal Counsel
Barbara van der Mars – CSI Policyholder Services Bureau Chief

2:00 - 2:30

The Gateway to Successful Insurance Filings

Rosann Grandy – CSI Forms Bureau Chief
Mari Kindberg – CSI Chief Actuary
Steve Hess – CSI Life and Disability Actuary

Financial Breakout Session

1:30 – 2:00

Montana is “Captives Country” – The Fascinating Role of Captives in Managing Risk

Steve Matthews – CSI Examinations Bureau Chief and Chief Financial Examiner

2:00 – 2:30

Emerging Issues in Financial Regulation

Tal Redpath – CSI Financial Examiner

Note -- All Attendees Reconvene in Main Conference Ballroom

2:30 - 3:00

“The Connector” Networking Break – Coffee and Conversation

3:00 – 3:30

CSI Resources – We’re Here to Help!

Jennifer McKee – CSI Communications and Policy Director

Laura Parvey-Connors – CSI Digital Communications Manager

3:30 – 4:00

Protecting Montana Consumers -- the Essential Role of CSI

Jesse Laslovich – Chief Legal Counsel

4:00 – 4:15

Closing Remarks

Monica J. Lindeen – Montana Insurance Commissioner