Contact Diahann Doyen
Telephone (972) 934-4264
Email ddoyen@marketscout.com
Website Marketscout.com

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CIPC Announces Agenda for the Third Annual CIPC Conference

High-Net-Worth Industry Experts Tackle Complexities of Insuring Private Clients

DALLAS, February 17, 2015 – The Council for Insuring Private Clients (CIPC) today announced the agenda for the third annual 2015 CIPC Conference, taking place on April 22 and 23 at The Magnolia Hotel in Dallas, Texas.

Over 250 wealth managers, estate planners, insurers, intermediaries, and specialty insurance agents will enjoy networking and educational opportunities at the CIPC Conference. Charles Williamson, Executive Vice President of Crystal & Company, will present at the conference along with other nationally recognized industry veterans including Dr. William T. Hold, President and Co-Founder of The National Alliance for Insurance Education & Research. Dr. Hold will provide an update on the Certified Personal Risk Manager (CPRM) Program.

In 2014, the CIPC collaborated with The National Alliance to develop the CPRM™ designation to provide the insurance and risk management communities with the tools and education to better serve the complex needs of high-net-worth clients. The National Alliance will be administering the second Pilot CPRM™ course entitled, "Understanding Coverage Differences: The Affluent and High-Net-Worth Client", on April 20 – 22, 2015.

"The CIPC welcomes anyone interested in networking, education, or advocacy related to insuring high-net-worth individuals and families. The agents, companies, vendors, and intermediaries who are CIPC members are clearly the leaders of the private client space," said Richard Kerr, CEO of MarketScout.

Registration is now open and includes access to all presentations, breakout sessions, networking breaks, and a themed cocktail reception. The agenda is as follows:

Wednesday, April 22, 2015

6:30 PM **Great Gatsby Swingin' Soiree**

Thursday, April 23, 2015

8:00 AM **Networking Breakfast**

8:30 AM **Welcome**
Richard Kerr, CEO, MarketScout

8:40 AM **Certified Personal Risk Management (CPRM) Designation**
Dr. William T. Hold, President and Co-Founder, The National Alliance

9:00 AM **Keynote: Top Ten Differences in an Underwriting vs Brokerage Executive**

Charles Williamson, Executive Vice President, Crystal & Co.

9:45 AM **How to Develop & Retain Your Private Clients**
How to Attract Millennials to Baby boomers
Laura Sherman, Founding Partner, Baldwin Krystyn Sherman

10:45 AM **Networking Break**

11:15 AM **Panel Discussion: Risks of Failed Contractor Relationships in the Private Household – When and What You Should Worry About: Workers Compensation, Overtime, Tax, Immigration and More**
Brian Dixon, Shareholder and Co-chair of Wage and Hour Practice, Littler
Erika Leventis, Workers Compensation Claims Manager, AIG
Peter Mahler, Founder and President, Mahler Private Staffing
Moderator: Kathryn Norris, National Family Manager, Fireman's Fund

12:15 PM **Lunch**

1:30 PM **Meet the Underwriters Breakout Sessions**
Session I: Recent Trends in Fine Art
Session II: Pitfalls of Builders' Risks & Not All Forms Are Equal

2:30 PM **Locational Data Impacting Acceptability & Pricing of Risks**
Howard A. Kunst, FCAS MAAA, Chief Actuary, Corelogic

3:30 PM **Networking Break**

4:00 PM **Cyber Risks**
Eduard Goodman, Chief Privacy Officer, IDT911

5:00 PM **Closing Remarks**
*agenda subject to change

For more conference information and to register, visit www.privateclientcouncil.com.

About CIPC

MarketScout founded the Council for Insuring Private Clients (CIPC) in 2012. Insurers AIG and Fireman's Fund are strategic partners and support the CIPC in its efforts to provide best practices, advocacy and education to insurers, agents and others involved in the business of protecting the assets of the wealthy. CIPC focuses on implementing best practices and risk management techniques for insuring the personal assets of private clients. The CIPC has partnered with The National Alliance for Insurance Education & Research to offer CPRM™, a five-course education program. Any agent or insurer with a focus on insuring high-net-worth individuals may join the CIPC. For more information, please visit privateclientcouncil.com or email cipc@marketscout.com.

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