



**Definitive Disability  
Conference 3**

October 12–13, 2017

Marriott Long Wharf | Boston, MA

The **DDC** is a two-day conference focusing on issues relating to the evaluation and litigation of disability claims, both with respect to disability income and long-term disability policies.

*18 Sessions!*

*"Possibly the best industry conference I have ever attended! Terrific from start to finish. Great session selection, content, speakers and networking opportunities."*

DDC Attendee

*"This conference was a refreshing change from other conferences and was a good balance between claim adjudication and legal topics. Also, a great opportunity to network."*

DDC 2 Attendee

**Which industry companies attended the DDC 2?**

Advocator Group, Ameritas, Cigna, Custom Disability Solutions, Disability Management Services, Disability RMS, Farm Family Life Insurance, Gen Re Life, Guardian Life, Hartford Life, HCC Specialty Underwriters, Liberty Life Assurance, MassMutual, Met Life, Munich Re, Mutual of Omaha, Northwestern Mutual, Ohio National, Professional Disability Associates, Prudential, Smith Group, Standard, Sun Life, Symetra, Trustmark, UnitedHealth Group, Universal American, University Disability Consortium, Unum.

*Presented by:*

**HINSHAW**

& CULBERTSON LLP

# PROGRAM & SPEAKERS

Thursday, October 12, 2017

7:45 a.m.

Registration & Continental Breakfast

8:30 a.m.

Welcome & Opening Remarks

8:45 a.m. -

Keynote Address

9:45 a.m.

Why I Threw Away My Ivy League Degree to Do Magic Tricks

Matt Marcy

Master Magician

## Track A

## Track B

10:00 a.m. -  
10:50 a.m.

**Putting It All Together: Improving Your Chances of Success in Disability Litigation With a Team Approach**

J. Christopher Collins  
*Of Counsel*  
Mirick, O'Connell, DeMallie & Lougee, LLP

11:00 a.m. -  
11:50 a.m.

**Claims Toolkit: The Effective Use of Legal, SIU and Other Resources in Claim Handling**

Sheila Farrar  
*Claims Consultant*  
MassMutual

Robin M. Fasoli  
*Paralegal*  
MassMutual

Julie Tendlak  
*Cert. Fraud Examiner & Cert. Info. Systems Auditor*  
MassMutual

**Explaining and Distinguishing SSDI Awards in the Context of Denying LTD Claims**

Bryan Bolton  
*Founding Member*  
Funk & Bolton, P.A.

**Co-Fiduciary Liability, Church Plans and Other Issues That Impact ERISA Disability Claims**

Mark E. Schmidtke  
*Shareholder*  
Ogletree, Deakins, Nash, Smoak & Stewart, P.C.

12:00 p.m.

Networking Luncheon

1:30 p.m. -  
2:20 p.m.

**DI Case Law Update**

Adam Formus  
*Assistant Vice President and Senior Counsel*  
Guardian Life Insurance Company

2:30 p.m. -  
3:20 p.m.

**Psychological Drivers of Extended Claim Duration in Comorbid Claims**

Michelle D. Schwab  
*Independent Disability Consultant*

3:30 p.m. -  
4:20 p.m.

**Oh, No You Don't! The Challenges of Rescinding a Disability Policy**

Jennifer Price  
*Assistant General Counsel / Litigation Section*  
Metropolitan Life Insurance Company

**Timing Is Everything: "Timing" Defenses to ERISA Claims**

David A. Barron  
*Associate General Counsel*  
Mutual of Omaha Insurance Company

**ERISA Disability Case Law Update**

Daniel K. Ryan  
*Partner*  
Hinshaw & Culbertson LLP

**The New ERISA Claim Regulations: What Is Clear, What Is Not, and What to Do**

James A. Keller  
*Partner*  
Saul Ewing LLP

4:30 p.m. -  
6:00 p.m.

Networking Reception

# PROGRAM & SPEAKERS

Friday, October 13, 2017

7:45 a.m.

## Continental Breakfast

### Track A

### Track B

8:30 a.m. -  
9:15 a.m.

#### Individual Disability Income: A Historical Market Perspective

Stephen Miller  
*Executive Vice President & COO*  
Disability Management Services, Inc.

#### Pre-Litigation Settlement of Denied Disability Claims

Ann M. Courtney  
*Assistant Vice President and Senior Counsel*  
Unum Group

9:25 a.m. -  
10:10 a.m.

#### Managing the Claims of Doctors, Lawyers and Other Professionals

Ernest P. Smith  
*Senior Partner*  
Nawrocki Smith, LLP

#### Discovery in ERISA Litigation

Jenny H. Wang  
*Partner*  
Hinshaw & Culbertson LLP

10:20 a.m. -  
11:05 a.m.

#### Making Mediation Work in Disability Disputes

Jeff Jury  
*Partner*  
Burns Anderson Jury & Brenner, L.L.P.

#### A Little Privacy, Please! A Discussion of Employee Personnel Files, HIPPA, and an Insured's Behavioral Health Records

Dennis M. Lynch  
*Partner*  
Figari + Davenport

11:15 a.m. -  
12:00 p.m.

#### Individual Disability Claims Issues – What's Keeping Us up at Night?

Elizabeth (Lisa) J. Bondurant  
*Partner*  
Womble Carlyle Sandridge & Rice, LLP

#### LTD Overpayment Claims After *Montanile*: Are They Still Viable?

Peter E. Pederson  
*Partner*  
Hinshaw & Culbertson LLP

Conference adjourns at 12:00 p.m. *Topics, speakers and times subject to change.*

**REGISTRATION:** The DDC 3 is an insurance industry-exclusive event. As such, the conference is only open to in-house counsel, management, claims and other industry-related personnel, including outside defense counsel. No plaintiffs' counsel and no bad faith expert witnesses may attend. The DDC 3 organizers and Hinshaw & Culbertson LLP reserve the right to decline registrations.

**SPONSORSHIP OPPORTUNITIES:** There are sponsorship opportunities available for the DDC 3. If you would like to join us in sponsoring the conference, please contact Cheryl Winkowski at 312-704-3132 or [CWinkowski@hinshawlaw.com](mailto:CWinkowski@hinshawlaw.com), or visit [www.DefinitiveDisabilityConference.com](http://www.DefinitiveDisabilityConference.com).

**HOTEL ACCOMMODATIONS:** A limited number of discounted hotel rooms have been made available at the Boston Marriott Long Wharf, 296 State Street, Boston, MA, 02109-2607. For reservations, please contact the hotel directly at 1-617-227-0800. Please mention Hinshaw's Definitive Disability Conference to take advantage of the group rate of \$349 Single/Double. The hotel block is limited and rooms and rates are available on a first-come, first-served basis. You must make reservations by September 30, 2017, or until the room block is filled, to be eligible for the group rate. Requests for reservations are then subject to room and rate availability.

**CLE CREDIT:** The educational portions of this conference will be submitted for approval of continuing legal education credits. All CLE credits are pending and hours may vary by state.

**REFUND POLICY:** The registration fee is fully refundable for cancellations received on or before September 14, 2017. Cancellations received from September 15, 2017 through September 28, 2017, will receive a refund, less a \$50 processing fee. Cancellations received after September 28, 2017, will not receive a refund. All cancellations and requests for refunds must be made in writing by e-mail to Cheryl Winkowski at [CWinkowski@hinshawlaw.com](mailto:CWinkowski@hinshawlaw.com). All refunds will be mailed within four weeks after the final date of the conference. Substitutions may be made at any time without charge, but must be submitted in writing to Cheryl Winkowski.

**THE SMALL PRINT: No collusion:** It is great for all of us to get together to learn, to network and to share ideas. But we must not collude. Not only is collusion ethically wrong, but it is illegal. So enjoy the company, knowledge, thoughts and good times of and with your fellow industry colleagues. But do not encourage or participate in any efforts to collude with others, whether within sessions or otherwise.

**NO LEGAL ADVICE:** Not only is discussion of legal issues inevitable, it is encouraged at the DDC 3. However, just as a discussion of a specific medical condition generally is no substitute for seeking personal medical advice when diagnosed with that medical condition, acting on generalized statements concerning the law is ill-advised if one is faced with a particular legal problem. The statements, views and opinions expressed by any speaker at the DDC 3 should not be considered legal advice. If you have a legal issue, do not rely on what is said at this conference for your particular situation. Please consult with a lawyer.

**WHO IS SPEAKING ON BEHALF OF WHOM?** We are trying to do a good thing here, bringing folks in our industry together to learn, share information and network. However, we do not "vet" the statements made by the speakers. Their statements reflect their views, opinions and beliefs, not those of either Hinshaw & Culbertson LLP or the DDC 3 chairs, Martin E. Rosen and Robert E. Hess.



# Definitive Disability Conference

# REGISTRATION & FEES

Full Name: \_\_\_\_\_

Job Title: \_\_\_\_\_

Company/Organization: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

First Name for Badge \_\_\_\_\_

Telephone: \_\_\_\_\_

\*E-mail: \_\_\_\_\_

(\*E-mail addresses are required to process registration but will remain private and will not be shared with others.)

For each time slot, please select your program preferences:  
(Attendees may switch back and forth between tracks)

## REGISTRATION FEES

### Track A

### Track B

	<b>Early Bird Registration</b> (on or before June 29, 2017)	<b>Regular Registration</b> (on or after June 30, 2017)
<b>In-House Legal Counsel</b> (at insurance companies and TPAs)	<b>\$100</b>	<b>\$125</b>
<b>Insurance Company</b> (other)	<b>\$375</b>	<b>\$425</b>
<b>All Other Delegates</b> (including outside defense counsel)	<b>\$725</b>	<b>\$775</b>

- Putting It All Together: Improving Your Chances of Success in Disability Litigation With a Team Approach
- Claims Toolkit: The Effective Use of Legal, SIU and Other Resources in Claim Handling
- DI Case Law Update
- Psychological Drivers of Extended Claim Duration in Comorbid Claims
- Oh, No You Don't! The Challenges of Rescinding a Disability Policy
- Individual Disability Income: A Historical Market Perspective
- Managing the Claims of Doctors, Lawyers and Other Professionals
- Making Mediation Work in Disability Disputes
- Individual Disability Claims Issues – What's Keeping Us up at Night?

- Explaining and Distinguishing SSDI Awards in the Context of Denying LTD Claims
- Co-Fiduciary Liability, Church Plans and Other Issues That Impact ERISA Disability Claims
- Timing Is Everything: "Timing" Defenses to ERISA Claims
- ERISA Disability Case Law Update
- The New ERISA Claim Regulations: What Is Clear, What Is Not, and What to Do
- Pre-Litigation Settlement of Denied Disability Claims
- Discovery in ERISA Litigation
- A Little Privacy, Please! A Discussion of Employee Personnel Files, HIPPA, and an Insured's Behavioral Health Records
- LTD Overpayment Claims After *Montanile*: Are They Still Viable?

**Please complete registration form and mail to:**

Serena Vitellaro  
Hinshaw & Culbertson LLP  
222 North LaSalle Street  
Suite 300  
Chicago, IL 60601

Checks made payable to:  
**Hinshaw & Culbertson LLP**

**Taxpayer ID: 362128133**

**Questions?** Please contact Cheryl Winkowski at 312-704-3132 or CWinkowski@hinshawlaw.com

[www.DefinitiveDisabilityConference.com](http://www.DefinitiveDisabilityConference.com)