

# 2026 Professional Liability ROUNDTABLE



**MAY 14**  
**THE GLEACHER CENTER**  
**UNIVERSITY OF CHICAGO**  
**BOOTH SCHOOL OF BUSINESS**  
**CHICAGO, ILLINOIS USA**

# PROFESSIONAL LIABILITY ROUNDTABLE

Sponsored by the IADC Professional Liability Committee, Medical Defense and Health Law Committee, and Insurance and Reinsurance Committee, the Professional Liability Roundtable (PLR) is a one-day CLE program. Through a series of interactive panel discussions, PLR creates a forum for in-house counsel, outside counsel, and insurance claims representatives to learn together and discuss new developments in the professional liability arena. Beyond the educational opportunity, PLR participants are able to network with lawyers and industry professionals from multiple jurisdictions both during the program and at a concluding reception.

## **Programming Content**

PLR includes afternoon tracks for professional liability and medical liability, as well as morning insurance programs, making this a full-day, multi-specialty roundtable. All attendees participate in the final closing panel and concluding reception.

## Registration and Fees

### **REGISTRATION**

To register for the Professional Liability Roundtable on the IADC website:

[www.iadclaw.org/events/2026-professional-liability-roundtable](http://www.iadclaw.org/events/2026-professional-liability-roundtable)

### **FEES**

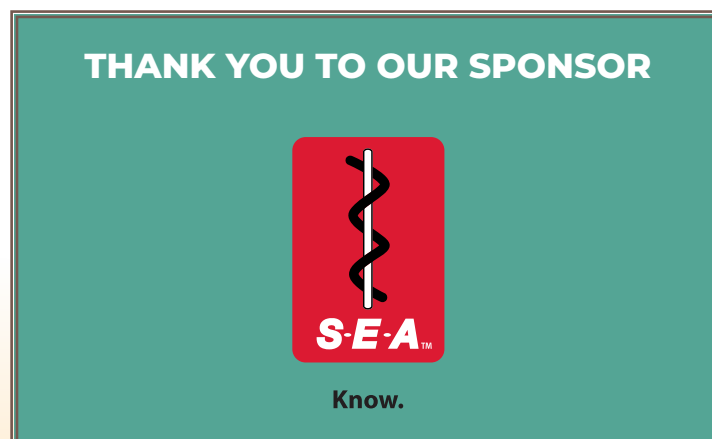
Outside Counsel: \$645 (Member/Non-Member)

Insurance Executives/Corporate Counsel: Complimentary

These registration fees are the same whether you choose to attend the entire day of programming, or if you choose to only attend either the morning or afternoon sessions. If you will be attending the afternoon sessions, please select a program track when registering.

### **QUESTIONS?**

For questions on registration, email Leeza Abramovich at [labramovich@iadclaw.org](mailto:labramovich@iadclaw.org) (Meetings Coordinator). For other meeting questions, email Jennifer Aron at [jaron@iadclaw.org](mailto:jaron@iadclaw.org) (Professional Development Manager).



## Schedule at a Glance

|                               |                                                                                                    |
|-------------------------------|----------------------------------------------------------------------------------------------------|
| 8:00 a.m. - 8:30 a.m.         | REGISTRATION                                                                                       |
| <b><u>INSURANCE TRACK</u></b> |                                                                                                    |
| 8:30 a.m. - 8:45 a.m.         | WELCOME AND INTRODUCTIONS                                                                          |
| 8:45 a.m. - 9:45 a.m.         | WHAT IS OLD IS NEW – THE GROWTH OF PEER2PEER RISK POOLS AS AN ALTERNATIVE TO TRADITIONAL INSURANCE |
| 9:45 a.m. - 10:00 a.m.        | NETWORKING BREAK                                                                                   |
| 10:00 a.m. - 11:00 a.m.       | NEW DAY, SAME OLD HEADACHES                                                                        |
| 11:00 a.m. - 11:30 a.m.       | LUNCH BREAK                                                                                        |
| 11:30 a.m. - 12:30 p.m.       | CHICAGO'S MOVERS AND SHAKERS: LEARNING FROM THE LEADERSHIP STYLES OF CHICAGO'S MAYORS              |
| 12:30 p.m. - 12:45 p.m.       | REGISTRATION                                                                                       |

### **PROFESSIONAL LIABILITY TRACK**

|                         |                                                                                                       |
|-------------------------|-------------------------------------------------------------------------------------------------------|
| 12:45 p.m. - 12:50 p.m. | WELCOME                                                                                               |
| 12:50 p.m. - 1:50 p.m.  | YOUR CLIENT IS NOT THE CEO: ETHICAL PITFALLS WHEN REPRESENTING ORGANIZATIONS                          |
| 1:50 p.m. - 2:05 p.m.   | NETWORKING BREAK                                                                                      |
| 2:05 p.m. - 3:05 p.m.   | BEYOND THE OFFICE AND LIBRARY: UNDERSTANDING THE STANDARD OF CARE IN AN AI-ADOPTING REMOTE WORK WORLD |

### **MEDICAL LIABILITY TRACK**

|                         |                                                                                  |
|-------------------------|----------------------------------------------------------------------------------|
| 12:45 p.m. - 12:50 p.m. | WELCOME                                                                          |
| 12:50 p.m. - 1:50 p.m.  | <i>BERK V. CHOY</i> AND THE END OF PRE-SUIT EXPERT REQUIREMENTS IN FEDERAL COURT |
| 1:50 p.m. - 2:05 p.m.   | NETWORKING BREAK                                                                 |
| 2:05 p.m. - 3:05 p.m.   | HOW THE BIG BEAUTIFUL BILL RESHAPES LONG-TERM CARE OPERATIONS                    |

### **CONCLUDING AFTERNOON SCHEDULE**

|                       |                                                                      |
|-----------------------|----------------------------------------------------------------------|
| 3:05 p.m. - 3:20 p.m. | NETWORKING BREAK                                                     |
| 3:20 p.m. - 3:30 p.m. | COMMENTS FROM IADC PRESIDENT                                         |
| 3:30 p.m. - 4:30 p.m. | ONE BATTLE AFTER ANOTHER: THE RISING TRENDS IN OCCUPATIONAL VIOLENCE |
| 4:30 p.m. - 4:40 p.m. | CLOSING REMARKS                                                      |
| 4:40 p.m. - 5:40 p.m. | NETWORKING RECEPTION                                                 |

# Insurance Track Schedule

8:00 a.m. - 8:30 a.m.

## Registration

8:30 a.m. - 8:45 a.m.

## Welcome and Introductions

**J. Dominic Campodonico**, *IADC President, Gordon Rees Scully Mansukhani, LLP, San Francisco, CA USA*

**Steven E. Peiper**, *Insurance Program Chair, Hurwitz & Fine, P.C., Buffalo, NY USA*

8:45 a.m. - 9:45 a.m.

## What is Old is New – The Growth of Peer2Peer Risk Pools as an Alternative to Traditional Insurance

For centuries, communities have pooled resources for the greater protection of the group. As we roll headlong in to the AI revolution, insurance consumers are provided with a growing list of alternatives to the traditional means of securing coverage. This presentation will explore the steadily expanding trend of Peer2Peer insurance groups, including a discussion of how online risk pools are formed through social networks and online marketing. The discussion will also address the impact of artificial intelligence as a mechanism to broaden pools and define risk through the potential member's social media footprint. The program will explore regulatory challenges of Peer2Peer insurance sharing relationships in highly regulated personal lines coverage, and whether risk sharing can provide an alternative to excess and surplus lines coverage.

Speaker: **Lee S. Siegel**, *Hurwitz Fine P.C., Hartford, CT USA*

9:45 a.m. - 10:00 a.m.

## Networking Break

10:00 a.m. - 11:00 a.m.

## New Day, Same Old Headaches

Professional lines coverage is often made up of a myriad of self-insured risks, defined Risk Retention Groups, and excess and surplus coverages aimed at limiting overall exposure. This presentation will explore risk allocation among and between all forms of coverage for potential exposure and the impact of self-insurance retentions on primacy of coverage obligations. The program will also address ethical challenges which can also arise where the exposure stretches over several years and multiple policy terms, including the impact of a shared duty to defend. Finally, the program will address the challenges in reconciling coverage obligations in a professional liability policy with the often-blurred lines between professional liability and general negligence risks.

Speaker: **Courtney Britt**, *Teague Campbell Dennis & Gorham, LLP, Raleigh, NC USA*

11:00 a.m. - 11:30 a.m.

## Lunch Break

11:30 a.m. - 12:30 p.m.

## **Chicago's Movers and Shakers: Learning from the Leadership Styles of Chicago's Mayors**

Join as we discuss the different leadership styles of recent Chicago mayors, including Harold Washington, Richard M. Daley, and Rahm Emanuel, and other prominent civic leaders. We'll compare and contrast their approaches to building coalitions, motivating staff, and engaging with the public. Each offer lessons for public, private, and nonprofit leaders. The presentation includes visuals and practical examples.

Speaker: **Professor Joseph P. Schwieterman, PhD**, *Sustainable Urban Development Program Director, DePaul University, Chicago, IL USA*

12:30 p.m. - 12:45 p.m.

## **Registration**

# **Professional Liability Track Schedule**

12:45 p.m. - 12:50 p.m.

## **Welcome**

**Timothy F. Sullivan**, *Professional Liability Program Chair, Recreation Risk Retention Group, Noblesville, IN USA*

12:50 p.m. - 1:50 p.m.

## **Your Client is Not the CEO: Ethical Pitfalls When Representing Organizations**

When lawyers advise organizations, they often communicate through employees, officers, and board members – each with their own interests and perspectives. But who is the actual client? This deceptively simple question lies at the heart of many malpractice lawsuits and disciplinary complaints. This program explores the ethical challenges that arise when representing organizational clients, including conflicts, misunderstandings about representation, and the risks of inadvertently forming attorney-client relationships with constituents. Through a review of the rules governing organizational representation, practical examples, and risk-management tips, presenters will offer guidance on how to identify the client, communicate clearly, and avoid common traps that can lead to disciplinary complaints or malpractice exposure.

Speakers: **Melissa Dorman Matthews**, *Steptoe & Johnson PLLC, Plano, TX USA*; **Michael J. Rossi**, *Conn Kavanaugh Rosenthal Peisch & Ford, LLP, Boston, MA USA*

1:50 p.m. - 2:05 p.m.

## **Networking Break**

2:05 p.m. - 3:05 p.m.

### **Beyond the Office and Library: Understanding the Standard of Care in an AI-Adopting Remote Work World**

There is no doubt the mechanics of the practice of law, as well as insurance claims handling, have changed significantly since March 2020. Lawyers and claims handlers frequently are now home-based, with all the possible distractions of that environment. Coupled with that significant change is the change being wrought by the availability and adoption of AI-driven litigation and claim handling software. This panel will discuss some of those changes, and offer opinions on how, if at all, the standard of care for insurance claims handlers and lawyers have changed in the past six years.

Speakers: **James J. Hunter**, *Collins Einhorn Farrell, P.C., Southfield, MI USA*; **Kim Noble**, *Applied Financial Lines, Chicago, IL USA*; **Kathryn Whitlock**, *McAngus Goudelock & Courie, Atlanta, GA USA*

## Medical Liability Track Schedule

12:45 p.m. - 12:50 p.m.

### **Welcome**

**Constance A. Endelicato**, *Medical Liability Program Chair, Theodora Oringher PC, Los Angeles, CA USA*

12:50 p.m. - 1:50 p.m.

### **Berk v. Choy and the End of Pre-Suit Expert Requirements in Federal Court**

This program will address the recent United States Supreme Court decision of *Berk v. Choy* and the impact on medical malpractice and other professional liability cases filed in federal court. With this decision, plaintiffs in federal court will no longer be required to follow state laws for confirmation of pre-suit expert support, removing a significant hurdle to filing. The panel will discuss various state court laws and the potential for biased panel decisions, as well as prejudicial practices that impact the defense. The panelists will lead discussion on the history and purpose of pre-suit safeguards, and the effects they have had on professional negligence litigation. The program will conclude with strategic practices for defense counsel, clients, institutions, and insurance professionals going forward.

Speakers: **Tiffany R. Brown**, *Senior Claims Examiner, Pennsylvania Insurance Department, Harrisburg, PA USA*; **Paula A. Koczan**, *Weber Gallagher Simpson Stapleton Fires & Newby, LLP, Pittsburgh, PA USA*; **Ryan McBride**, *Weber Gallagher Simpson Stapleton Fires & Newby, LLP, Scranton, PA USA*

1:50 p.m. - 2:05 p.m.

### **Networking Break**

2:05 p.m. - 3:05 p.m.

### How the Big Beautiful Bill Reshapes Long-Term Care Operations

This presentation examines the operational and litigation implications of the so-called “Big Beautiful Bill” for long-term care providers, with a particular focus on emerging legal risks and defense strategies. As sweeping legislative changes reshape funding mechanisms, regulatory oversight, staffing requirements, and compliance obligations, long-term care operators face heightened exposure to civil litigation and regulatory enforcement actions. This presentation will focus on how the impact of the “Big Beautiful Bill” reaches well beyond day-to-day operations and directly influences the types, frequency, and severity of legal claims providers – and their counsel – are likely to face.

Speakers: **Kenneth Kim**, *Berkshire Hathaway Specialty Insurance, New York, NY USA*; **Heidi L. Mandt**, *Williams Kastner, Portland, OR USA*

## Concluding Afternoon Schedule

3:05 p.m. - 3:20 p.m.

### Networking Break

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

### Comments From IADC President

**J. Dominic Campodonico**, *IADC President, Gordon Rees Scully Mansukhani, LLP, San Francisco, CA USA*

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

### One Battle After Another: The Rising Trends in Occupational Violence

This discussion will explore various targeted violence affecting professionals across the three industries that make up this conference. We will be discussing real-world examples such as the Brian Thompson murder, as well as violence against health care providers, judges, and attorneys.

Speakers: **Michael LeCrone**, *Zurich North America, Head of Corporate Investigations and Security Services, Schaumburg, IL USA*; **G. Michael Verden**, *Founder and Security & Safety Consultant, The Lake Forest Group, Lake Forest, IL USA*; **Supervisory Special Agent**, *FBI, Chicago, IL USA*

4:30 p.m. - 4:40 p.m.

### Closing Remarks

**Timothy F. Sullivan**, *PLR Program Chair, Recreation Risk Retention Group, Noblesville, IN USA*

**Constance A. Endelicato**, *MLR Program Chair, Theodora Oringer PC, Los Angeles, CA USA*

**Steven E. Peiper**, *Insurance Program Chair, Hurwitz & Fine, P.C., Buffalo, NY USA*

4:40 p.m. - 5:40 p.m.

### Networking Reception

# General Information

## LOCATION AND DIRECTIONS

University of Chicago, Gleacher Center  
450 North Cityfront Plaza Drive  
Chicago, Illinois 60611

The University of Chicago's Gleacher Center is located in the heart of Chicago's downtown just off the Magnificent Mile. It's close to the Loop, shopping, and hotels. The building features stunning views of Chicago's skyline and waterways. Please view the following link for information on directions and parking; maps, and transportation for the Gleacher Center:

[www.chicagobooth.edu/about/locations/gleacher](http://www.chicagobooth.edu/about/locations/gleacher)

## ACCOMMODATIONS AND TRANSPORTATION

If you require lodging while attending the conference, please plan to make reservations at your preferred hotel as soon as possible. Hotels in downtown Chicago are often near occupancy capacity in May. O'Hare and Midway Airports serve Chicago. Cab fare from O'Hare is approximately \$45 and you should allow an hour to an hour and a half for travel. Cab fare from Midway is approximately \$40 and you should allow 30-45 minutes for travel. During rush hour times, you may consider taking the Blue Line train (O'Hare) to the Clark and Lake stop or the Orange Line train (Midway) to the Lake and State stop and taking a short cab ride or walking from there.

## CLIMATE AND DRESS

When packing for your trip, please note that average temperatures in Chicago this time of year range from a high of 70 degrees Fahrenheit to a low of 60 degrees Fahrenheit. Business and business casual attire are appropriate for the conference.

## CLE CREDITS

Approximately 6.0 hours of general CLE credit in 60-minute states and 7.2 hours of general CLE credit in 50-minute states will be requested for accreditation from all mandatory continuing legal education jurisdictions where registered attendees are licensed.

## CPD CREDIT (CANADA)

The IADC is a Pre-Approved Provider of CPD Credit with the Law Society of British Columbia. The Quebec CPD Committee recognizes courses approved by other Canadian bars as approved in Quebec. For those in attendance at the Professional Liability Roundtable, 6 CPD credits are available.

## SPECIAL NEEDS

If you have any special needs during the meeting (i.e. diet or accessibility), please email Jennifer Aron at [jaron@iadclaw.org](mailto:jaron@iadclaw.org) (Professional Development Manager).

## DATA PRIVACY AND COLLECTION

Data is collected on attendees through registration for the purposes of executing the meeting and communicating with attendees about the meeting. Meeting sponsors have access to the registration list provided to all attendees.

If any attendee has questions on data use and privacy, please contact Mary Beth Kurzak, Executive Director and CEO, at [mkurzak@iadclaw.org](mailto:mkurzak@iadclaw.org).

## CANCELLATION POLICY

A CASH REFUND, less a \$150 processing fee, will be made if a written notice of cancellation is received by the IADC office more than thirty (30) days prior to the first day of the meeting. No reason for the cancellation need be provided for a timely notice of cancellation.

NO CASH REFUND will be made if notice of cancellation is received by the IADC office thirty (30) days or less prior to the first day of the meeting. However, if special circumstances arise before the meeting which prevent attendance, a member may request a future meeting credit. The request needs to be in writing and submitted to the IADC office. It should be directed to the Finance Committee's attention and note the special circumstances which caused cancellation. The credit request can only apply to meeting registration fees (not air, hotel, activity, tour, or special event fees) and, if approved, will be valid for use toward any IADC meeting for one (1) year from the date of the meeting for which credit is requested. A \$150 processing fee will be deducted from the total future meeting credit.

All future meeting credit requests will be considered by the Finance Committee and the decision of that Committee will be final.

# PROFESSIONAL LIABILITY ROUNDTABLE | MAY 14

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## **THANK YOU**

Thank you to the members of the Professional Liability Roundtable Planning Committee, the Medical Liability Track Planning Team, and Insurance Programming Planning Team for their work to make this meeting possible.

### **PROFESSIONAL LIABILITY ROUNDTABLE PLANNING COMMITTEE**

**Timothy F. Sullivan**, *Chair, Recreation Risk Retention Group, Noblesville, IN USA*

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