

# 2026 Professional Liability Roundtable

**THURSDAY, MAY 14**

## 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.      (60 General CLE Minutes)

### 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.      (60 General CLE Minutes)

### 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*

## 2026 Professional Liability Roundtable

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

### Lunch Break

11:30 a.m. - 12:30 p.m. (60 General OR Professionalism CLE Minutes)

### 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. (60 Ethics/Professional Responsibility CLE Minutes)

### 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

## 2026 Professional Liability Roundtable

2:05 p.m. - 3:05 p.m.      (60 Ethics/Professional Responsibility OR Technology CLE Minutes)

### **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 Oringer PC, Los Angeles, CA USA*

12:50 p.m. - 1:50 p.m.      (60 General CLE Minutes)

### **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**

## 2026 Professional Liability Roundtable

2:05 p.m. - 3:05 p.m. **(60 General CLE Minutes)**

### 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. - 3:25 p.m.

### Networking Break

3:25 p.m. - 4:25 p.m. **(60 General CLE Minutes)**

### 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*

4:25 p.m. - 4:35 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*

4:35 p.m. - 5:35 p.m.

### Cocktail Reception