

**SATURDAY, JUNE 27**

2:30 PM – 7:00 PM

**Optional Activity: Sunset Ranch – Mount Hollywood Trail Horseback Tour**

Saddle up for an unforgettable two-hour horseback adventure through the scenic trails of Griffith Park. Led by an expert guide, this leisurely ride winds through more than 5,000 acres of breathtaking landscape in the heart of Los Angeles. Along the way, you will take in iconic views of the Hollywood Sign, the Griffith Observatory, and sweeping views of downtown skyline.

*The cost of this activity is \$400 and includes round-trip transportation. Participants must be 8 years old or older, and the maximum rider weight is 240 pounds. Long pants and closed-toe shoes are required.*

**SUNDAY, JUNE 28**

11:00 AM – 5:00 PM

**Board Meeting**

11:00 AM – 6:30 PM

**Registration and Event Information Desk**

The Registration and Event Information Desk is the main hub for conference information and badge pickup. NAMIC staff will be on hand to welcome you and answer any questions you have throughout the conference.

6:00 PM – 8:00 PM

**Welcome Festivities**

You won't want to miss this opportunity to relax and connect with fellow attendees and guests. The Welcome Festivities will feature delectable food stations and interactive entertainment. Children are welcome to participate in these festivities. Ages, dietary restrictions, and allergies will be collected pre-event, but please confirm restrictions and allergies with the staff upon drop-off.

*An open bar will be available and resort attire is appropriate. Skirts, dresses, slacks, and knit tops are appropriate for women. Collared shirts, dress slacks, or dress denim are appropriate for men.*

**MONDAY, JUNE 29**

6:00 AM – 8:00 AM

**Attendee Breakfast**

6:00 AM – 12:15 PM

**Registration and Event Information Desk**

The Registration and Event Information Desk is the main hub for conference information and badge pickup. NAMIC staff will be on hand to welcome you and answer any questions you have throughout the conference.

6:00 AM – 12:15 PM

**Sponsor Showcase**

7:30 AM – 9:30 AM

**Guest Breakfast**

8:00 AM – 8:15 AM

**NAMIC Welcome and Conference Kickoff**

**Neil Aildredge**  
 President & Chief Executive Officer  
 NAMIC

8:15 AM – 9:15 AM

**Opening Power Session: Economic Update**

During this session, Elliot Eisenberg, Ph.D., will provide an overview and outlook for the economic environment in which insurance operates. He will share his thoughts on how all four parts of the gross domestic product will perform, what changes are in store for the softening labor market, the path of inflation, the thinking of the Federal Reserve, the most likely route of interest rates, and the likelihood of a near-term recession. Elliot will also delve into new and existing car sales and prices, auto and credit card default rates, the shape of the yield curve, and much more.

**Elliot Eisenberg**  
 Chief Executive Officer & Chief Economist  
 GraphsandLaughs, LLC

9:15 AM – 9:30 AM

**Networking Break**

**MONDAY, JUNE 29 (CONTINUED)**

9:30 AM – 10:30 AM

**Emerging Issues Power Session: Tipping Point Risks – How Climate, Space Weather, and Electric Grid Vulnerabilities Intersect**

This session will explore climate and human-induced tipping points—critical thresholds causing significant, often irreversible environmental changes like Arctic warming, polar ice loss, and Gulf Stream slowdown. It will also discuss space weather risks, such as solar storms impacting power grids and communications. The presentation highlights rising energy demands from data centers and challenges in renewable energy adoption, emphasizing the need for reliable energy infrastructure. Overall, it provides a comprehensive view of risks from climate change, energy, and technological vulnerabilities affecting industries and society. The session will be followed by facilitated Q&A and audience polling.

**Joshua Darr**  
Global Head of Peril Advisory  
Guy Carpenter

10:30 AM – 10:45 AM

**Networking Break**

10:45 AM – 11:45 AM

**Industry Trends Power Session: Agent Consolidation – A Catalyst for Distribution Model Change**

We will analyze how mutual carriers can strategically and operationally adapt to thrive against large, financially focused conglomerates. The discussion will cover maintaining competitive advantage by evolving traditional strengths, like superior customer service and accessible leadership, and taking proactive steps beyond relationships to differentiate offerings. It will also cover adaptation & action through specific, actionable steps to reinvent operating structures and effectively engage with consolidated agencies. Additionally, it will address value creation by creating enhanced value for policyholders and the broader independent agency system, balancing traditional strengths with the market's new realities. Finally, it will cover agency management by learning from other carriers that successfully adapted their distribution models to work with large, private-equity-backed partners.

**Andrew Katz**  
Senior Vice President, Business Strategy & Growth  
MarshBerry

**Keith Captain**  
President  
FirstChoice

11:45 AM – 12:15 PM

**Ted Talk Presentations**

**Lindsey DiGangi**  
Vice President, Business Development & Marketing  
Pennsylvania Lumbermens Mutual Insurance Company

**Brandon Keller**  
President & Chief Executive Officer  
Germania Mutual Insurance Company

12:15 PM – 6:00 PM

**Optional Activity: Pedal or Not – LA Electric Bike Tour**

Your adventure begins in the heart of Santa Monica, where you'll cruise along the coast aboard a comfortable electric beach cruiser through some of Los Angeles' most iconic seaside neighborhoods. Designed for a smooth and effortless ride, the e-bikes feature cushioned seats and give you the freedom to pedal using seven gears, engage the electric motor with a simple twist of the wrist, or combine both for the perfect ride experience.

*The cost of this activity is \$200 and includes round-trip transportation and a guided tour. Riders should be comfortable riding a bicycle. Participants must be 13 years old or older, and the maximum rider weight is 250 pounds. Lunch is not included in this activity, so please plan accordingly.*

12:30 PM – 1:30 PM

**CFO Roundtables Lunch**

12:30 PM – 1:30 PM

**Executive Operations Roundtables Lunch**

12:30 PM – 3:00 PM

**NAMIC PAC Activity: South Coast Botanic Garden**

Join NAMIC PAC for a relaxing afternoon at the beautiful South Coast Botanic Garden in sunny California on Monday, June 29, from 12:30–3:00 p.m. PST. Enjoy a scenic experience on the stunning Palos Verdes Peninsula, surrounded by lush gardens, tranquil walking paths, and vibrant seasonal blooms. Guests will have the opportunity to explore the grounds while indulging in a curated wine and cheese tasting experience designed to delight every palate. This is the perfect opportunity to unwind, connect with fellow attendees, and experience one of Southern California's most picturesque destinations. Transportation to and from the event will be provided.

**MONDAY, JUNE 29 (CONTINUED)**

1:30 PM – 5:00 PM	<p><b>CFO Roundtables Small Group Discussions</b></p> <p>CFO Roundtables is designed as small group discussions to share strategic insights and foster connections with peers. This is a great opportunity to connect with like-minded peers on subjects important to you.</p>
1:30 PM – 5:00 PM	<p><b>Executive Operations Roundtables Small Group Discussions</b></p> <p>Executive Operations Roundtables is designed as small group discussions to share strategic insights and foster connections with peers. This is a great opportunity to connect with like-minded peers on subjects important to you.</p>
4:30 PM – 5:30 PM	<p><b>Happy Hour</b></p> <p>All attendees are invited to join Xceedance for a Happy Hour</p>

**TUESDAY, JUNE 30**

6:00 AM – 8:00 AM	<p><b>Attendee Breakfast</b></p>				
6:00 AM – 11:20 AM	<p><b>Registration and Event Information Desk</b></p> <p>The Registration and Event Information Desk is the main hub for conference information and badge pickup. NAMIC staff will be on hand to welcome you and answer any questions you have throughout the conference.</p>				
6:00 AM – 11:20 AM	<p><b>Sponsor Showcase</b></p>				
7:30 AM – 9:30 AM	<p><b>Guest Breakfast</b></p>				
8:00 AM – 9:05 AM	<p><b>Industry Trends Power Session: Insurance in the Crosshairs</b></p> <p>The property/casualty insurance industry is under pressure. In congressional hearings, state capitals, and in the media, concerns are raised regarding availability and affordability of insurance, especially personal lines products. Extreme voices ask if the future is “insurable.” This panel will address the concerns with a three-fold discussion on first-party insurance trends, developments in long-tailed insurance lines, and a peek at public policy issues impacting insurance buyers, providers and the broader economy.</p> <table border="0"> <tr> <td> <p><b>Erin Collins</b>                      Senior Vice President, State &amp; Policy Affairs                      NAMIC</p> </td> <td> <p><b>James Grande</b>                      Senior Vice President, Federal &amp; Political Affairs                      NAMIC</p> </td> </tr> <tr> <td colspan="2"> <p><b>Jerry Theodorou</b>                      Director, Finance, Insurance &amp; Trade Program                      R Street Institute</p> </td> </tr> </table>	<p><b>Erin Collins</b>                      Senior Vice President, State &amp; Policy Affairs                      NAMIC</p>	<p><b>James Grande</b>                      Senior Vice President, Federal &amp; Political Affairs                      NAMIC</p>	<p><b>Jerry Theodorou</b>                      Director, Finance, Insurance &amp; Trade Program                      R Street Institute</p>	
<p><b>Erin Collins</b>                      Senior Vice President, State &amp; Policy Affairs                      NAMIC</p>	<p><b>James Grande</b>                      Senior Vice President, Federal &amp; Political Affairs                      NAMIC</p>				
<p><b>Jerry Theodorou</b>                      Director, Finance, Insurance &amp; Trade Program                      R Street Institute</p>					
9:05 AM – 9:50 AM	<p><b>Industry Trends Power Session: The Mutual Advantage – A Strategic Capital and Structure Playbook for Mutual Leaders</b></p> <p>In an environment of rising volatility, regulatory scrutiny, and evolving stakeholder expectations, mutual company executives are being forced to rethink how they define and manage financial strength. This session will take a strategic look at how mutual holding company structures, captives, and broader capital structure decisions can support long term independence, growth, and resilience. With a specific focus on maintaining and enhancing AM Best financial strength ratings, the discussion will explore how CEO’s and boards can align capital strategy with corporate goals.</p> <table border="0"> <tr> <td> <p><b>Matthew Stern</b>                      Partner                      Willkie Farr &amp; Gallagher LLP</p> </td> <td> <p><b>Kathleen Monaghan</b>                      Head of Corporate Finance, Aon Capital Advisory                      Aon</p> </td> </tr> </table>	<p><b>Matthew Stern</b>                      Partner                      Willkie Farr &amp; Gallagher LLP</p>	<p><b>Kathleen Monaghan</b>                      Head of Corporate Finance, Aon Capital Advisory                      Aon</p>		
<p><b>Matthew Stern</b>                      Partner                      Willkie Farr &amp; Gallagher LLP</p>	<p><b>Kathleen Monaghan</b>                      Head of Corporate Finance, Aon Capital Advisory                      Aon</p>				
9:50 AM – 10:10 AM	<p><b>Ted Talk Presentations</b></p> <p><b>Elisabeth Sandersfeld</b>                      Chief Financial Officer &amp; Chief Risk Officer                      Merchants Bonding Company</p>				
10:10 AM – 10:20 AM	<p><b>Networking Break</b></p>				

**TUESDAY, JUNE 30 (CONTINUED)**

10:20 AM – 11:20 AM

**A. Long-Term CEO Succession Planning: Improving the Way the World is Led**

This session explores the board’s critical role in CEO succession, emphasizing the importance of disciplined, proactive planning - even when transitions are not imminent. Attendees will learn how to establish an evergreen succession pathway, define a future-focused CEO success profile, and assess internal candidates through structured, evidence-based approaches that reduce bias and build credibility. The discussion will also address translating assessments into observable readiness, leveraging external perspectives to preserve optionality, and making informed decisions at key inflection points.

**Heather Blonkenfeld**  
Leadership and Succession Consultant  
Russell Reynolds

**David Seeley**  
Managing Director, Financial Services  
Russell Reynolds

10:20 AM – 11:20 AM

**B. Profitable Growth**

This session explores how carriers can drive profitable growth by aligning product strategy, market insight, and agent support. Attendees will examine emerging product opportunities for today and the future, gain insight into how small to mid-sized businesses are reshaping their approach to insurance, and understand the evolving needs of the SME market. The discussion will also highlight how mutual and regional insurers can better equip and support their agents to compete effectively, deepen client relationships, and capture sustainable growth.

**Trindl Reeves**  
Chief Revenue Officer  
Marsh & McLennan

10:30 AM – 4:00 PM

**Optional Activity: Sidewalk Food Tour of Venice Beach**

Discover the best of Venice Beach on a one-of-a-kind sidewalk food tour through one of Los Angeles’ most iconic coastal neighborhoods. Your experience includes five unique tasting stops featuring standout local favorites and the diverse flavors that make Venice Beach such a celebrated food destination. Led by expert guides who have spent years uncovering the neighborhood’s most delicious hidden gems, this tour blends incredible bites with the history, culture, and stories that give Venice Beach its unmistakable character.

*The cost of this activity is \$300 and includes round-trip transportation. Participants should come ready to walk and explore the neighborhood at a relaxed pace.*

11:30 AM – 12:30 PM

**NAMIC PAC Golf Outing Check-In & Lunch**

12:30 PM – 5:00 PM

**NAMIC PAC Golf Outing**

5:30 PM – 6:30 PM

**Happy Hour**

All attendees are invited to join ZestyAI and Epoq for a Happy Hour

**WEDNESDAY, JULY 1**

6:00 AM – 8:00 AM

**Attendee Breakfast**

6:00 AM – 11:00 AM

**Registration and Event Information Desk**

The Registration and Event Information Desk is the main hub for conference information and badge pickup. NAMIC staff will be on hand to welcome you and answer any questions you have throughout the conference.

6:00 AM – 11:00 AM

**Sponsor Showcase**

7:30 AM – 9:30 AM

**Guest Breakfast**

8:00 AM – 9:00 AM

**Emerging Issues Power Session: From Theory to Practice – Practical Use Cases of Artificial Intelligence**

Join this session as we move past the "AI honeymoon phase" to explore the grit and strategy required for measurable execution. During this engaging discussion, we'll dive into the reality of the productivity lag and the complex hurdles of change management, shifting the focus from speculative potential to proven organizational impact.

**Scott Klososky**  
Partner  
Future Point of View

**WEDNESDAY, JULY 1 (CONTINUED)**

9:00 AM – 9:10 AM

**Networking Break**

9:10 AM - 9:25 AM

**Award in Innovation Presentation**

NAMIC has been proudly presenting the Award in Innovation since 2014. The award was created to recognize mutual companies who exemplify the vision and entrepreneurialism it takes to stay relevant in changing times. Whether the ideas are big, small, or internal- or external-facing, each innovation is crucial to keeping our mutual community strong and stable for the future. Join us to learn more about the innovative ideas that were submitted and to celebrate the top submission as the 2026 winner is announced.

Learn more about Award in Innovation by visiting <https://www.namic.org/award/award-in-innovation/>.

**Ridge Muhly**

Managing Director & Leader, Regional/Mutual Segment  
 Guy Carpenter

9:25 AM – 10:00 AM

**Award in Innovation Panel Discussion**

Hear directly from Award in Innovation winners as they share how they are driving meaningful change within their organizations. This peer-led discussion will explore the strategic decisions, leadership approaches, and organizational enablers behind their success—along with key lessons learned and implications for executives looking to accelerate innovation at scale.

10:00 AM – 11:00 AM

**Closing Power Session: Becoming an Idea Factory - How to Turn Your Organization Into an Innovation Machine**

If there's one belief that is holding you back from getting the most out of your team, it's this one: some people are creative, and some people aren't. That belief is based on outdated ideas about what creativity means, where it comes from, and who gets to harness it. The truth is, creativity is a skill like any other: it can be learned. In the same way that we teach employees how to track expenses, process invoices, and jiggle the lock just right to get into the supply closet, we can teach them how to be more creative, how to have better ideas, and how to build a culture where innovation is a natural byproduct. In this talk, Kyle will inspire audience members to harness their own capacity for creativity and innovation and create a culture of innovation in their organization.

**Kyle Scheele**

Author & Keynote Speaker  
 Speaker