

AGENDA

MONDAY, SEPTEMBER 11

5:30PM – 7:30PM **Welcome Reception - Hosted by PwC Bermuda**
Flagpole at the Marina



TUESDAY, SEPTEMBER 12

7:30 AM **Registration Desk Opens**

7:30 AM – 9:30 AM **Breakfast with Exhibitors**
Princess Rooms

8:45AM – 9:30AM **Captive Ownership in the Age of Emerging Risks**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

David Maslo, Head of Business Development, ARC

Tanja Korff, Senior Vice President - Client Services Leader,
Marsh Management Services

Pierrick Livet, Senior Manager Advisory, KPMG in Bermuda

Richard Cutcher, Editor & Founder, Captive Intelligence

9:30AM – 9:35AM **Refreshment Break**
Harbourview Ballroom

9:35AM – 10:20AM **Powered by AI: Exploring the Future of Artificial Intelligence in Insurance**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

Richard Prior, SVP, Digital Transformation, RenaissanceRe

Duncan Card, Partner, Appleby

Justin Willmott, Vice President, SiriusPoint

Michael Branco, Founder & Chairman, Celeste Ventures

10:20AM – 10:45AM **Networking Break - Sponsored by Grant Thornton**
Princess Rooms



10:45AM – 11:30AM **Banking on the Future: Navigating Macro Issues in the Captive Arena**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

Anthony T. Riker, Head of the Captive and Insurance Banking Team, HSBC

Jody Feldman, Senior Vice President, Head of Corporate Banking, Butterfield

Shivani Seth, Business Podcaster, The Royal Gazette

11:30AM – 11:35AM **Refreshment Break**
Harbourview Ballroom

11:35AM – 12:20PM **Bermuda - A Catalyst for Innovation and Change in Life (Re)Insurance**
Harbourview Ballroom

Speakers

Christine Patton, Executive Director, BILTIR

James Claxton, Partner, EY

Jonathan Young, CEO, Boston Re

Rachel Derry, Executive Vice President, Liberty Mutual Management

12:20PM – 1:45PM **Networking Lunch - Sponsored by Brown & Brown**
Princess Rooms



1:45PM – 2:30PM **Exploring Excess: Trends and Opportunities for Global Reinsurers**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

Ann Kolman, SVP, Head of North America Casualty, Sampo

Michael Woodroffe, President, Kirkway International

Rick Hartmann, Senior Vice President, Guy Carpenter

2:30PM – 2:35PM **Refreshment Break**
Harbourview Ballroom

2:35PM – 3:20PM **Strengthening Your Captive: Exploring Legacy Solutions for Profitable Insurance Programmes**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

Dan Linden, Head of Mergers and Acquisition, Fleming Re
Charlie Thresh, Head of Financial Advisory, Teneo Bermuda
Alex O'Shea, Vice President, Mergers & Acquisition, Enstar Group
John West, Senior Vice President, Legacy Solutions and Captive Segment, Guy Carpenter

3:20PM – 3:45PM **Networking Break - Sponsored by Grant Thornton**
Princess Rooms



3:45PM – 4:45PM **Managing Risk and Returns: Navigating Market Volatility in Uncertain Times**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

Hugh Barit, Chairman & CEO, Performa
Peter B. Princi, CIMA®, Managing Director, Institutional Consulting Director, Graystone Consulting from Morgan Stanley
Graham Lamb, Assistant Director, Supervision (Insurance), Bermuda Monetary Authority
Mike Meehan, Principal, Milliman

4:45PM – 4:50PM **Refreshment Break**
Harbourview Ballroom

4:50PM – 5:35PM **Global Minimum Tax - An Easy Fix?**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

Mikhail Raybshteyn, Partner - Global Insurance Tax, EY
Scott Slater, Partner - Tax Services Leader, PwC Bermuda
Andy DeGregorio, Partner - Tax, Deloitte

5:35PM – 7:30PM **Cocktail Reception - Hosted by Aon**
Regency Terrace



WEDNESDAY, SEPTEMBER 13

7:30 AM **Registration Desk Opens**

7:30 AM – 9:30 AM **Breakfast with Exhibitors**
Princess Rooms

8:45AM – 9:45AM **Keynote Speaker: Carla Harris**
Harbourview Ballroom

Keynote

Carla Harris, Senior Client Advisor, Morgan Stanley

Introducer

Jeremy France, Head of Graystone and Institutional Consulting, Morgan Stanley

9:45AM – 9:50AM **Refreshment Break**
Harbourview Ballroom

9:50AM – 10:35AM **'CSI Captive': Uncovering Fraud with Forensic Claims Analysis**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

Janis Hagenbucher, Managing Director, Crawford Forensic Accounting Services

Gerry Bouwman, Global Strategy & Development Partner, MDD Forensic Accountants

Kyle Masters, Partner, Carey Olsen

Christopher Wilkie, International Executive General Adjuster (IEGA) & Cyber Incident Manager, Crawford Global Technical Services

10:35AM – 11:00AM **Networking Break**
Princess Rooms

11:00AM – 11:45AM **Head-to-Head: ISACs vs. SACs - Which Packs a Bigger Punch?**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

Oceana Yates, Senior Vice President - Captives, Davies Captive Management

Marthinus Dreyer, Senior Manager - Financial Advisory, Restructuring and Insolvency, Deloitte

Michael Kenny, Head of Client Services, Willis Towers Watson Management

Kim Willey, Senior Counsel, ASW Law

11:45AM – 11:50AM **Refreshment Break**
Harbourview Ballroom

11:50AM – 12:35PM **Fronting Challenges and Global Trends - Including Latam**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

Jorge Tabares, CFO, Grupo Energia Bogota

Adriana Scherzinger, Head of Alternative Risk Solutions,
US Commercial Insurance, Zurich North America

Gemma Grainger, Head of Customer Solutions, Insurance Services, Davies Group

Luis Delgado, Regional Director - Latam, Strategic Risk Solutions

12:35PM – 2:00PM **Networking Lunch - Sponsored by Truist**
Princess Rooms



2:00PM – 3:00PM **Regulatory Roadmap: Navigating Bermuda's Captive Regulator Landscape**
Harbourview Ballroom

Speakers

Timae Flood, Assistant Director – Supervision (Insurance), Bermuda Monetary Authority

Moses Muoki, Deputy Director – Supervision (Insurance), Bermuda Monetary Authority

Afnik Williams-Hyde, Assistant Director – Supervision (Anti-Money Laundering/Anti-Terrorist Financing), Bermuda Monetary Authority

Michael Fahy, Counsel - Regional Legal and Compliance Leader, SVP, Marsh McLennan

3:00PM – 3:05PM **Refreshment Break**
Harbourview Ballroom

3:05PM – 4:05PM **Expanding Employee Benefits through Captive Insurance**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

Sven Roelandt, Global Head of EB Financing Strategies,
Aon Health Solutions for Multinationals

Guy Worsey, Director - Customer & Distribution Management, Americas,
Zurich Global Employee Benefits Solutions

Hugh O'Neill, Executive Vice President, Global Insurance and Risk Management,
DHL Group

Grainne Richmond, Executive Vice President, Aon

4:05PM – 4:30PM **Networking Break**
Princess Rooms

4:30PM – 5:30PM **The Importance of Governance**
Harbourview Ballroom

This session is eligible for ICCIE credits

Speakers

Moses Muoki, Deputy Director – Supervision (Insurance), Bermuda Monetary Authority

Nick Miles, Partner, Kennedys

Paul Bailie, Managing Director, Willis Towers Watson Management

Rochelle Simons, Independent Non-Executive Director

Sherman Taylor, Head of Capital Markets (Bermuda), Ocorian

5:30PM – 7:00PM **Pre-party Networking Reception -**
Sponsored by Ocorian and Charles Taylor
Regency Terrace



7:00PM – 10:30PM **Wrap Party**
Harbourview Ballroom

Who **MAKES**
MY CAPTIVE *successful?*

- CAPTIVE MANAGER
- ACTUARY
- DOMICILE
- FRONTING CARRIER
- CUSTODIAN
- BANKER
- INVESTMENT MANAGER**

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* Assets under management as of 6/30/2023. Yousif Capital Management, LLC ("YCM") is an SEC registered investment adviser based in Bloomfield Hills, MI. Registration does not imply a certain level of skill or training. A more detailed description of YCM, its management team and practices can be found in the firm's Form ADV Part 2A which can be requested by contacting the company or at the company's website at yousifcapital.com or <https://adviserinfo.sec.gov>.