

**Contractor
Licensing**

REQUEST FOR EDUCATION ACCREDITATION

Application for Non-Code Credit Course

CLASS INFORMATION

Class Title: Surety Bonds vs Insurance

Non-Code classes must meet all Committee Defined Criteria and must fall under at least one Construction Science or Core Criteria as specified in the current "Non-code Education Guidelines" document.

Construction Science or Core Criteria #2 Construction Estimating, #4 Construction Accounting, #8 Construction Related Economics and Project Development

Instructor: Lindsay Wing

Attach instructor's detailed resume or complete pages 2 and 3.

Sponsoring Group: Kan-Struct 2019

Contact Person: Julie Sanders

Mailing Address: PO Box 86

City/State/Zip: Topeka, KS 66601

Phone (785) 266-4015 Fax No: (785) 266-2561

Location of Class: Wichita, KS On-site Instructed

Number of Hours of Classroom Instruction 1

Class Start Date: January 31, 2019

Class Completion Date: January 31, 2019

APPLICANT:

Name: _____ License #: _____

Company Name: Associated General Contractors of Kansas, Inc.

Address: PO Box 86

City/State/Zip: Topeka, KS 66601 E-Mail : jsanders@agcks.org

Phone: (785) 266-4015 Fax No: (785) 266-2561

The Education Committee meets the second Wednesday of each month, except during seminar months. Complete application packages must be received not later than the last business day of the month in order to be placed on the following month's meeting agenda. A completed application package includes the application, instructor's biography, course description, and sample attendance certificate. Applications may be mailed to Amber Clark c/o Contractor Licensing, 111 S. Cherry Ste. 1000, Olathe, KS 66061, or e-mailed to Amber.Clark@jocogov.org.

If you have questions, please call the Contractor Licensing office, 913-715-2233.

TO BE COMPLETED BY STAFF		
Date: <u>FEB 1 2019</u>	Hours <u>1</u> <u>NON-CODE</u>	
Approved <input checked="" type="checkbox"/> _____ Denied <input type="checkbox"/> _____	Comments: _____	
Approver <u>[Signature]</u>		
Course Identification # <u>19-018</u>	Course VB # _____	
SS: _____	Scanned: _____	Letter: _____

**Contractor
Licensing**

Instructor Information

Contact Information

Name Lindsay Wing Date 01/07/2019
Address 9393 W 110th Street, #600
City Overland Park State KS Zip 66210
Phone _____ Mobile Phone _____
Fax _____ E-mail lwing@hanover.com

Business Information

Company Name Surety Association of Kansas City
Address 9393 W 110th Street, #600
City Overland Park State KS Zip 66210
Phone _____ Fax _____
Instructor E-mail lwing@hanover.com
Direct all correspondence to: Home Address Business Address E-Mail

Education

Associate's Degree: SEE ATTACHED
Bachelor's Degree: _____
Master's Degree: _____
Certifications: _____
Relevant registrations or licenses: _____

Other relevant knowledge or trade experience: _____

**Contractor
Licensing**

Have you ever attended a Train-the-Trainer or similar type of course? Yes No

If yes, please indicate name of course, when and where you attended.

SEE ATTACHED

Have you ever participated in training or course materials development? Yes No

If yes, please indicate what course(s).

Have you ever served on a certification program development committee? Yes No

If yes please indicate type of program.

Please check the box that best describes your training or teaching experience:

None Less than 1 year 1-5 years 5-10 years 10+years

Please check the box that best describes your experience in construction or the trades.

None Less than 1 year 1-5 years 5-10 years 10+years

Please check the box that best describes your experience in construction code enforcement.

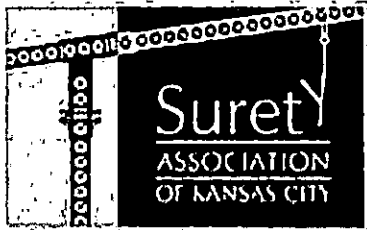
None Less than 1 year 1-5 years 5-10 years 10+years

Please check the box that best describes the number of participants you have instructed in a single class.

None Less than 20 participants 21-30 participants 31-100 participants

Areas of expertise:

List other courses you are qualified to teach:



President: Kelly Kimmel
Vice President: Zach Bradely
Treasurer: Lindsay Wing

Presenter: Lindsay Wing

Company / Chapter Affiliation: The Surety Association of Kansas City

Statement of Qualifications: I have been a surety underwriter for the last 12 years, both in the Northern California and Kansas City markets. I previously served as President of the Northern California Surety Association, where I promoted the use and benefits of surety bonds. I am currently serving as the Treasurer for the Surety Association of Kansas City and will be Vice President for the 2019 year.

Suggested Time: 45 minutes with 5 for Q&A

Presentation Title: Surety Bonds vs Insurance. Spoiler Alert: They are different

Description: Surety bonds are required on most public jobs, and certain private jobs. But what is a surety bond and how do you get one? I will use real-life scenarios to explain what a bond is (and isn't), how much it costs, and what and who is protected by a bond.

Many people are not aware that a bond is very different from insurance. In insurance, one person purchases a policy at a price an insurer has determined is sufficient to mitigate losses, in order to protect an asset they own (like a car). You pay premiums, and when a loss happens, the insurance company steps in and makes you whole. Bonds are different, because they are guaranteeing a promise. Unlike the insurance company, where there are just two parties, in the surety bond relationship, there are three: the bonding company, the person making a promise, and the person being promised something.

This unique relationship garners many questions. This presentation will demonstrate the fundamentals of surety bonds. I will also provide insight into why surety bonds can help your construction organization or contractor client.

- What is a bond?
- The 3-Party Agreement
- Finances of Bonding
- Why does this matter to you?



KANSTRUCT 2019
PRESENTATION INFORMATION / SPEAKER BIO
JAN 31 - FEB 1, 2019
WICHITA MARRIOTT - WICHITA, KS

Please complete and return to Kacy Simonsen (kacy.simonsen@casconstructors.com) no later than October 19, 2019

SPEAKER'S NAME & COMPANY: Lindsay Wing - Surety Association of Kansas City / Hanover

ADDITIONAL SPEAKERS:

EMAIL: lwing@hanover.com

PHONE NUMBER: 913-428-8118

PRESENTATION TITLE: Surety Bonds vs Insurance - Spoiler Alert: They Are Different

PRESENTATION DAY / TIME: Thursday, January 31, 2019 @ 10:45 am

PRESENTATION DESCRIPTION:

Surety bonds are required on most public jobs, and certain private jobs. But what is a surety bond and how do you get one? We will walk through some real-life scenarios to explain what a bond is (and isn't), how much it costs, and what and who is protected by a bond.

Further:

Many people are not aware that a bond is very different from insurance and even banking. In insurance, one person purchases a policy at a preset price in order to protect an asset they own (like a car or house). You pay premiums, and when a loss happens, the insurance company steps in and makes you whole. Bonds are different, because they are guaranteeing a promise. Unlike the insurance company, where there are just two parties, in the surety bond relationship, there are three: the bonding company, the person making a promise, and the person being promised something. And unlike banking, where a loan or line of credit is secured by an asset, a surety bond is unsecured.

This unique three-party relationship garners many unique questions. Together, we will learn the fundamentals of surety bonds. We will also see why surety bonds can help your construction organization, whether you want to require someone to bond, or are being asked to provide a bond yourself. Finally, we will unpack the process of obtaining bonds to

LEARNING OBJECTIVES:
(LIST 4)

1. Understand the fundamentals of a surety bond
2. Do your own evaluation of risk mitigation given by a bond on a particular project (case study)
3. Understand the cost/pricing of surety bonds
4. See what the surety industry does well, and where we need improvement

SPEAKER BIOGRAPHY:

Finally understand surety bonds with veteran underwriter Lindsay Wing. Lindsay began her surety career in 2006 with Travelers in San Francisco, writing everything from publicly-traded national contractors, to small start-ups. After 5 years at Travelers she was hired by local competitor Liberty Mutual. During her tenure in San Francisco she held positions as Treasurer, Vice President, and President of the Surety Association of Northern California. Her attention to detail in that role even led to her uncovering embezzlement within the association! In 2015, she and her family relocated to her hometown of Leawood, KS. She is currently Treasurer for the Surety Association of Kansas City.

ADDITIONAL SPEAKER BIO:

ADDITIONAL SPEAKER BIO:

ADDITIONAL SPEAKER BIO:



THIS AWARD CERTIFIES THAT

John Doe, Doe Construction

IS HEREBY RECOGNIZED FOR SUCCESSFULLY COMPLETING

Surety Bonds vs Insurance

DATE OF CLASS: January 31, 2019

LENGTH OF CLASS: 1 Hour

SIGNATURE

DATE

**Contractor
Licensing**

REQUEST FOR EDUCATION ACCREDITATION

Application for Non-Code Credit Course

CLASS INFORMATION

Class Title: Beyond Regulatory Compliance: Moving Your Safety Culture to the Next Level

Non-Code classes must meet all Committee Defined Criteria and must fall under at least one Construction Science or Core Criteria as specified in the current "Non-code Education Guidelines" document.

Construction Science or Core Criteria #9 Construction Site Safety & Security

Instructor: Sharon Mount

Attach instructor's detailed resume or complete pages 2 and 3.

Sponsoring Group: Kan-Struct 2019

Contact Person: Julie Sanders

Mailing Address: PO Box 86

City/State/Zip: Topeka, KS 66601

Phone (785) 266-4015 Fax No: (785) 266-2561

Location of Class: Wichita, KS On-site Instructed

Number of Hours of Classroom Instruction 1

Class Start Date: January 31, 2019 Class Completion Date: January 31, 2019

APPLICANT:

Name: _____ License #: _____

Company Name: Associated General Contractors of Kansas, Inc.

Address: PO Box 86

City/State/Zip: Topeka, KS 66601 E-Mail: jsanders@agcks.org

Phone: (785) 266-4015 Fax No: (785) 266-2561

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If you have questions, please call the Contractor Licensing office, 913-715-2233.

TO BE COMPLETED BY STAFF		
Date: <u>FEB 7 2019</u>	Hours: <u>1 NON-CODE</u>	
Approved <input checked="" type="checkbox"/> Denied <input type="checkbox"/>	Comments:	
Approver: <u>[Signature]</u>		
Course Identification # <u>19-017</u>	Course VB # _____	
SS: _____	Scanned: _____	Letter: _____

**Contractor
Licensing**

Instructor Information

Contact Information

Name Sharon Mount Date 01/07/2019
Address 920 Main Street, Ste 1700
City Kansas City State MO Zip 64141
Phone 816-843-4444 Mobile Phone _____
Fax _____ E-mail smount@thomasmcgee.com

Business Information

Company Name Thomas McGee, L.C.
Address 920 Main Street, Ste 1700
City Kansas City State MO Zip 64141
Phone 816-842-4800 Fax _____
Instructor E-mail smount@thomasmcgee.com
Direct all correspondence to: Home Address Business Address E-Mail

Education

Associate's Degree: SEE ATTACHED
Bachelor's Degree: _____
Master's Degree: _____
Certifications: _____
Relevant registrations or licenses: _____

Other relevant knowledge or trade experience: _____

Contractor Licensing

Have you ever attended a Train-the-Trainer or similar type of course? Yes No

If yes, please indicate name of course, when and where you attended.

SEE ATTACHED

Have you ever participated in training or course materials development? Yes No

If yes, please indicate what course(s).

Have you ever served on a certification program development committee? Yes No

If yes please indicate type of program.

Please check the box that best describes your training or teaching experience:

None Less than 1 year 1-5 years 5-10 years 10+years

Please check the box that best describes your experience in construction or the trades.

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Please check the box that best describes your experience in construction code enforcement.

None Less than 1 year 1-5 years 5-10 years 10+years

Please check the box that best describes the number of participants you have instructed in a single class.

None Less than 20 participants 21-30 participants 31-100 participants

Areas of expertise:

List other courses you are qualified to teach:



Sharon Mount, CSP
Loss Control Consultant
Thomas McGee, L.C.

smount@thomasmcgee.com

Direct: (816) 843-4444

Cell: (816) 806-9766

Sharon's responsibilities for Thomas McGee L.C. focus on assisting our clients with development of effective safety programs addressing worker safety and public liability. She acts as a liaison between clients and insurance carrier safety professionals by reviewing carrier recommendations and assisting clients with implementation and compliance. Sharon ensures clients receive appropriate loss prevention services both offered and promised by the insurance carrier.

Sharon worked in the construction safety field for 13 years. Her experience includes working as a Senior Safety Specialist for a large commercial construction general contractor and as a Division Safety Manager for a global engineering, consulting and construction company.

Education:

M. S. Safety Management – University of Central Missouri

Certifications:

Certified Safety Professional (CSP), 2004

Authorized OSHA Construction Outreach Trainer

Authorized OSHA General Industry Outreach Trainer

Authorized National Safety Council First Aid/CPR Instructor

Membership:

American Society of Safety Engineers

Construction Safety Group of Kansas City



**KANSTRUCT 2019
PRESENTATION INFORMATION / SPEAKER BIO
JAN 31 - FEB 1, 2019
WICHITA MARRIOT - WICHITA, KS**

Please complete and return to Kacy Simonsen (kacy.simonsen@casconstructors.com) no later than October 19, 2019

SPEAKER'S NAME & COMPANY: Sharon Mount - Thomas McGee

ADDITIONAL SPEAKERS:

EMAIL: smount@thomasmcgee.com

PHONE NUMBER: 816-843-4444

PRESENTATION TITLE: Beyond Regulatory Compliance: Moving Your Safety Culture to the Next Level

PRESENTATION DAY / TIME: Thursday, January 31, 2019 @ 10:45 am

PRESENTATION DESCRIPTION: Every company has a safety culture. This presentation will help you identify at what level your culture is functioning and offer ideas about ways to improve safety culture - in turn, making your company more successful.

**LEARNING OBJECTIVES:
(LIST 4)**

1. How safety performance reflects safety culture.
2. How accidents relate to culture.
3. Leadership actions affecting culture.
4. Importance of change.

SPEAKER BIOGRAPHY:

Sharon is a Loss Control Consultant with Thomas McGee Group. She assists clients with the development, management, implementation and coordination of their safety and risk management programs. Sharon worked in the construction safety field for 13 years prior to working at Thomas McGee. She has a MS in Safety Management from the University of Central Missouri and achieved the designation of CSP in 2004. Sharon served on the Executive Committee of the Construction Safety Group of Kansas City and is a member of the American Society of Safety Engineers.

ADDITIONAL SPEAKER BIO:

ADDITIONAL SPEAKER BIO:

ADDITIONAL SPEAKER BIO:

Julie Sanders

From: Mount, Sharon <smount@thomasmcgee.com>
Sent: Monday, August 14, 2017 7:24 AM
To: jsanders@agcks.org
Cc: vnickel@ckcins.com
Subject: Kan-struct 2018 Conference
Attachments: Bio - Sharon Mount.pdf

Julie,

Vickie Nickel asked me to present at the Kan-struct Conference. I know this submission is late but if you are interested in the following I would be happy to present:

Presenter Name: Sharon Mount, CSP

Company: Thomas McGee, L.C.

Statement of Qualifications: Attached Bio

Presentation Title: Beyond Regulatory Compliance: Moving Your Safety Culture to the Next Level

Description: Good or bad, every company has an existing safety culture. This presentation will discuss tools and ideas for those interested in taking their company beyond OSHA compliance and improving safety culture.

I would need 80 minutes for this presentation. Feel free to contact me if you have any questions. Thanks!

Sharon Mount, CSP

Loss Control Consultant, Thomas McGee, L.C.

920 Main, Ste. 1700 | Kansas City, MO 64105

Direct: 816.843.4444 | Cell: 816.806.9766 | Main: 816.842.4800

Toll Free: 800.423.9044 | Fax: 816.472.5018

[WEBSITE](#) | [FACEBOOK](#) | [LINKEDIN](#)

Only you can make your workplace safe. Any risk management duties of your company cannot be delegated and Thomas McGee accepts no delegation and cannot assume any of those risk management duties and/or decisions. Thomas McGee will assist you by providing risk management and consulting services but makes no warranties in conjunction with those services. Information provided has been compiled and obtained from sources believed to be reliable and credible but no representation or warranty, express or implied, is made by Thomas McGee as to accuracy or completeness. The information is intended to be general and advisory in nature and shall not be considered legal advice. Thomas McGee and its employees do not assume any liability of any kind whatsoever, resulting from the use, or reliance upon any information, material or procedure contained herein. Thomas McGee does not undertake to bring you into full compliance with any local, state or federal health or safety laws or contractual obligations and does not assume any obligations you may have to identify, manage, control or correct any hazard on your premises or in your operations. **CONFIDENTIALITY STATEMENT:** This e-mail contains information from Thomas McGee, L.C. and may be confidential or privileged. The information is intended solely for the use of the individual(s) or entity(ies) named above. If you are not the intended recipient, be aware that any use of the contents of this message is prohibited. If you have received this e-mail in error, please notify me immediately by e-mail reply and delete this message. Although this e-mail and any attachments are believed to be free of any virus or other defect, it is the responsibility of the recipient to ensure that this is virus free and no responsibility is accepted by Thomas McGee, L.C. for any loss or damage arising from its use. Nothing contained within this e-mail, including any attachments, is intended to include or constitute an "electronic signature" as defined in 15 U.S.C. 7006(5). Thank you.



THIS AWARD CERTIFIES THAT

John Doe, Doe Construction

IS HEREBY RECOGNIZED FOR SUCCESSFULLY COMPLETING

**Beyond Regulatory Compliance
Moving your Safety Culture to the Next Level**

DATE OF CLASS: January 31, 2019

LENGTH OF CLASS: 1 Hour

SIGNATURE

DATE

**Contractor
Licensing**

REQUEST FOR EDUCATION ACCREDITATION

Application for Non-Code Credit Course

CLASS INFORMATION

Class Title: How to Rockstar Your Business

Non-Code classes must meet all Committee Defined Criteria and must fall under at least one Construction Science or Core Criteria as specified in the current "Non-code Education Guidelines" document.

Construction Science or Core Criteria #6 Construction Methods and Materials

#10 Construction Management and Site Supervision

Instructor: Susan Frew, Sunshine Plumbing Heating Air

Attach instructor's detailed resume or complete pages 2 and 3.

Sponsoring Group: Kan-Struct 2019

Contact Person: Julie Sanders

Mailing Address: PO Box 86

City/State/Zip: Topeka, KS 66601

Phone (785) 266-4015 Fax No: (785) 266-2561

Location of Class: Wichita, KS On-site Instructed

Number of Hours of Classroom Instruction 1

Class Start Date: February 1, 2019

Class Completion Date: February 1, 2019

APPLICANT:

Name: _____ License #: _____

Company Name: Associated General Contractors of Kansas, Inc.

Address: PO Box 86

City/State/Zip: Topeka, KS 66601 E-Mail : jsanders@agcks.org

Phone: (785) 266-4015 Fax No: (785) 266-2561

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TO BE COMPLETED BY STAFF		
Date: <u>FEB 7 2019</u>	Hours: <u>1</u>	<u>NON-CODE</u>
Approved <input checked="" type="checkbox"/> _____ Denied <input type="checkbox"/>	Comments: _____	
Approver: <u>[Signature]</u>		
Course Identification # <u>19-0116</u>	Course VB # _____	
SS: _____	Scanned: _____	Letter: _____

**Contractor
Licensing**

Instructor Information

Contact Information

Name Susan Frew Date 01/07/2019
Address 9791 Brighton Road
City Henderson State CO Zip 80640
Phone _____ Mobile Phone _____
Fax _____ E-mail susan@sunshineplumbingheating.com

Business Information

Company Name Sunshine Plumbing Heating Air
Address 9791 Brighton Road
City Henderson State CO Zip 80640
Phone 303-459-5469 Fax _____
Instructor E-mail susan@sunshineplumbingheating.com
Direct all correspondence to: Home Address Business Address E-Mail

Education

Associate's Degree: SEE ATTACHED
Bachelor's Degree: _____
Master's Degree: _____
Certifications: _____
Relevant registrations or licenses: _____

Other relevant knowledge or trade experience: _____

Contractor Licensing

Have you ever attended a Train-the-Trainer or similar type of course? Yes No

If yes, please indicate name of course, when and where you attended.

SEE ATTACHED

Have you ever participated in training or course materials development? Yes No

If yes, please indicate what course(s).

Have you ever served on a certification program development committee? Yes No

If yes please indicate type of program.

Please check the box that best describes your training or teaching experience:

None Less than 1 year 1-5 years 5-10 years 10+years

Please check the box that best describes your experience in construction or the trades.

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Please check the box that best describes your experience in construction code enforcement.

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None Less than 20 participants 21-30 participants 31-100 participants

Arcus of expertise:

List other courses you are qualified to teach:



KANSTRUCT 2019
PRESENTATION INFORMATION / SPEAKER BIO
JAN 31 - FEB 1, 2019
WICHITA MARRIOTT - WICHITA, KS

Please complete and return to Kacy Simonsen (kacy.simonsen@casconstructors.com) no later than October 19, 2019

SPEAKER'S NAME & COMPANY: Susan Frew, Sunshine Plumbing Heating Air

ADDITIONAL SPEAKERS: _____

EMAIL: susan@sunshineplumbingheating.com

PHONE NUMBER: (303) 459-5469

PRESENTATION TITLE: How to Rockstar Your Business

PRESENTATION DAY / TIME: Keynote Session, Friday, February 1, 2019 @ 8am

PRESENTATION DESCRIPTION:

Susan Frew shares her journey to success by growing her Plumbing Heating and Air Conditioning Business by 535% using a cutting edge marketing strategy, today's technology, and attracting millennial workers.

Attendees will receive a step-by-step plan for growing their business with ideas to put into action immediately to see results in their business.

LEARNING OBJECTIVES:
(LIST 4)

- Growing your company
- How to engage cutting edge marketing and public relations
- A blueprint for attracting and working with millennial workers
- A set of simple tools to Rockstar your Audience Business'

SPEAKER BIOGRAPHY:

Using her business coaching experience having coached 17 different trades to success, Susan Frew now uses her experience to propel her family plumbing business. Sunshine Plumbing Heating Air has grown from 177,000 in 2012 to a projected 3M in 2018.

The Frews' were able to create their unique selling proposition by delivering outstanding customer service, great follow up, on time, on budget projects using the 12 points of LOVE philosophy.

Susan Roberts Frew is a former International VP with AT&T Wireless, an Action COACH business coach, instructor for the SBA's national Emerging Leaders program, and radio host of "Coaching Not Just for Sports" on ESPN radio in Denver. She is also a took the TEDx stage in 2017.

Currently she is the President of Sunshine Plumbing Heating Air in Denver, President of PHCC Colorado, Zone 4 Director of National PHCC, Board Member Metro North Chamber of Commerce, Board Member Adams County Workforce, Quality Service Contractors Trustee,

ADDITIONAL SPEAKER BIO:

and Advisory Board Member of Emily Griffith Vocational School.

After a break to focus on Sunshine's growth, Susan is a professional speaker and emcee and travels around the US delivering keynotes and training to trades conventions helping members to "Rockstar their Business"!

ADDITIONAL SPEAKER BIO:

ADDITIONAL SPEAKER BIO:



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John Doe, Doe Construction

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How to Rockstar Your Business

DATE OF CLASS: February 1, 2019

LENGTH OF CLASS: 1 Hour

SIGNATURE

DATE

**Contractor
Licensing**

REQUEST FOR EDUCATION ACCREDITATION

Application for Non-Code Credit Course

CLASS INFORMATION

Class Title: Traditional Insurance vs Alternative Risk Finance: Risks and Rewards

Non-Code classes must meet all Committee Defined Criteria and must fall under at least one Construction Science or Core Criteria as specified in the current "Non-code Education Guidelines" document.

Construction Science or Core Criteria #9 Construction Site Safety & Security

Instructor: Adam Balentine, ARM - Thomas McGee and Dan Hogan - Thomas McGee

Attach instructor's detailed resume or complete pages 2 and 3.

Sponsoring Group: Kan-Struct 2019

Contact Person: Julie Sanders

Mailing Address: PO Box 86

City/State/Zip: Topeka, KS 66601

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TO BE COMPLETED BY STAFF		
Date: <u>FEB 7 2019</u>	Hours: <u>1 Non-CODE</u>	
Approved <input checked="" type="checkbox"/> Denied <input type="checkbox"/>	Comments: _____	
Approver: <u>[Signature]</u>		
Course Identification # <u>19-014</u>	Course VB # _____	
SS: _____	Scanned: _____	Letter: _____

**Contractor
Licensing**

Instructor Information

Contact Information

Name Adam Balentine and Dan Hogan Date 01/07/2019
Address 920 Main Street, Ste 1700
City Kansas City State MO Zip 64141
Phone _____ Mobile Phone _____
Fax _____ E-mail abalentine@thomasmcgee.com

Business Information

Company Name Thomas McGee, L.C.
Address 920 Main Street, Ste 1700
City Kansas City State MO Zip 64141
Phone 816-842-4800 Fax _____
Instructor E-mail abalentine@thomasmcgee.com, dhogan@thomasmcgee.com
Direct all correspondence to: Home Address Business Address E-Mail

Education

Associate's Degree: SEE ATTACHED
Bachelor's Degree: _____
Master's Degree: _____
Certifications: _____
Relevant registrations or licenses: _____

Other relevant knowledge or trade experience: _____

Contractor Licensing

Have you ever attended a Train-the-Trainer or similar type of course? Yes No

If yes, please indicate name of course, when and where you attended.

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If yes, please indicate what course(s).

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If yes please indicate type of program.

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List other courses you are qualified to teach:



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PRESENTATION INFORMATION / SPEAKER BIO
JAN 31 - FEB 1, 2019
WICHITA MARRIOT - WICHITA, KS**

Please complete and return to Kacy Simonsen (kacy.simonsen@casconstructors.com) no later than October 19, 2019

SPEAKER'S NAME & COMPANY: Adam Balentine, ARM - Thomas McGee

ADDITIONAL SPEAKERS: Dan Hogan - Thomas McGee

EMAIL: abalentine@thomasmcgee.com; dhogan@thomasmcgee.com

PHONE NUMBER: 816-843-4446 (Adam direct line)

PRESENTATION TITLE: Traditional Insurance vs. Alternative Risk Finance: Risks and Rewards

PRESENTATION DAY / TIME: Thursday, January 31, 2019 @ 3:15 pm

PRESENTATION DESCRIPTION:

Group captive insurance programs have seen a sharp rise in popularity over the last several years vs. guaranteed cost (traditional) insurance programs. We will primarily discuss what group captives are and what motivates companies to choose to explore them. As part of the group captive discussion we will focus on:

- what they are
- advantages vs disadvantages
- who is a fit/ how do you join?

We will also explore a few other areas of alternative risk finance including:

- single parent captives
- micro-captives (enterprise risk captives)
- self-insurance
- employee benefits captives

Closing will include time for Q&A

LEARNING OBJECTIVES:
(LIST 4)

Answering the following:

- What are the differences between group captives and guaranteed cost insurance?
- What are the potential risks and rewards of a group captive program?
- Who is a good fit for a group captive or other alternative risk finance mechanisms?
- What are some other alternative risk finance mechanisms besides group captives?

SPEAKER BIOGRAPHY:

Adam Balentine, ARM
Associate Partner
Director of Insurance Operations

Adam serves as the practice leader for client service, insurance carrier relations and business development in the Commercial Insurance Department. He also provides oversight and coaching to the Personal Risk and Loss Control Departments. Adam was previously at Lockton for nine years in both San Francisco and Kansas City. Between 2012 and 2014 he served as Assistant Vice President and lead Account Executive in Lockton's National Financial Institution Practice.

During his career he has served clients in various industries including Private Sector, Public Entity, Non-Profit, Commercial Real Estate, Manufacturing, Retail, Construction and Professional/ Financial Services. Adam's diverse experience includes assisting clients with not only Executive Liability, Cyber Liability and P&C placements, but also implementation of Enterprise Risk Management Programs, Global/ International Insurance programs, multi-layer Quota-Shared Property programs, Alternative Risk Transfer including Captives and various

ADDITIONAL SPEAKER BIO:

Dan Hogan
Risk Consultant

Dan Hogan comes to Thomas McGee with a wealth of risk management knowledge in the manufacturing and construction industries. He helped implement strategies with various companies in order to reduce work-related accidents and workers' compensation claims. In addition, Dan has worked with different business owners and decision heads to meet their budget and improve their working cash flow.

Dan's goal with every client he works with is to provide a proactive strategy that will improve the working conditions for the company and in turn, increase the bottom line.

Dan was born and raised in the foothills of Colorado. He was one of five siblings to attend Benedictine College in Atchison, KS. There, he received a B.A. in Finance, with a minor in Political Science. Dan lives in Lenexa, KS with his wife Kerry Ann and their two children,

ADDITIONAL SPEAKER BIO:

ADDITIONAL SPEAKER BIO:



THIS AWARD CERTIFIES THAT

John Doe, Doe Construction

IS HEREBY RECOGNIZED FOR SUCCESSFULLY COMPLETING

**Traditional Insurance vs Alternative Risk Finance
Risks and Rewards**

DATE OF CLASS: January 31, 2019

LENGTH OF CLASS: 1 Hour

SIGNATURE

DATE