

**KANSAS INSURANCE INSTITUTE 2010**  
**August 30 - September 2, 2010**  
**SOFE Examiner Registration Form**

To guarantee registration, please provide all requested information.

**Name:** \_\_\_\_\_

**Organization:** \_\_\_\_\_


**City:** \_\_\_\_\_

**State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_


**E-Mail:** \_\_\_\_\_

**Phone:** (\_\_\_\_\_) \_\_\_\_\_

**Three Ways to Register:**

 **Mail** Kansas Insurance Institute 2010  
 PO Box 2455  
 Topeka, KS 66601-2455

 **Web** [www.ksinsurance.org/register](http://www.ksinsurance.org/register)

 **Fax** 785-296-8848

**Registration Fee for SOFE Examiner CRE Program:**

Registration received by August 20, 2010	Registration received after August 20, 2010
<b>\$300 (Save \$50)</b>	<b>\$350</b>

**Payment Methods:**

- Check:** Check payable to **Kansas Insurance Institute** enclosed.
- Credit Card/Electronic Check:** Available through web registration only. Processing fee will apply.
- Purchase Order:** Available to government agencies only.  
 PO # \_\_\_\_\_

**Box Lunch Menu Selection:**

Tuesday, August 31

- Turkey Sandwich
- Roast Beef Sandwich
- Ham Sandwich
- Grilled Chicken Caesar Salad
- Greek Salad with Chicken

**Kansas Insurance Institute 2010**

Kansas Insurance Commissioner Sandy Praeger and the Kansas Insurance Department are pleased to invite you to the Kansas Insurance Institute 2010.

**Continuing Education Credits**

Up to **25.0** hours of continuing regulatory education credit, approved by the Society of Financial Examiners (SOFE), is available for certified financial examiners.

**Institute Location**

All sessions will be held at:  
 Overland Park Marriott  
 10800 Metcalf Avenue  
 Overland Park, Kansas 66210  
 Telephone: 913-451-8000

<http://www.marriott.com/hotels/travel/mciop-overland-park-marriott/>

**Hotel Accommodations**

A block of rooms is being held at the Overland Park Marriott in Overland Park, Kansas. Make your reservations by calling 913-451-8000 or Toll-Free at 1-800-228-9290. A reduced room rate of \$90 per night is available, if reservations are made by **6:00 PM on August 9, 2010**. Ask for the *Kansas Insurance Department* group rate when calling.

Reservations may also be made online at:

<http://www.marriott.com/hotels/travel/mciop?groupCode=kidkida&app=resvlink&fromDate=8/30/10&toDate=9/2/10>

**Dress Code**

The Kansas Insurance Institute dress is business casual.

**Special Needs**

If you have any special needs, such as wheel chair access or special dietary requirements, please contact us at 785-296-8711 no less than three (3) days before the event.



**Cancellations/Substitutions**

Cancellations must be in writing and received on or before **August 25, 2010**. Cancellations made after August 25 are subject to a 50% administrative fee. Substitutions for registered attendees may be made at any time by notifying us in writing.

**For more information, please call 785-296-8711**



**Continuing  
 Regulatory  
 Education (CRE)  
 Program for  
 SOFE Examiners**

**Aug 30 - Sept 2, 2010**

Overland Park Marriott  
 10800 Metcalf Avenue  
 Overland Park, Kansas

**Up to 25.0 CRE  
 Credits Available**

Kansas Insurance Department  
 Sandy Praeger  
*Commissioner of Insurance*

**KANSAS INSURANCE INSTITUTE 2010**

## Monday, August 30, 2010

11:00-12:45 **Registration**

12:45-1:00 **Welcome**

1:00-1:50 **Holding Company Analysis**

David Vacca, CPA  
Assistant Director, Insurance Analysis &  
Information Services Department  
NAIC

1:50-2:00 **Break**

2:00-2:50 **Holding Company Analysis  
(continued)**

David Vacca, CPA

2:50-3:40 **SAP Update**

Robin Marcotte, CPA, CFE, ARe, CISA  
Accounting and Reporting Manager  
NAIC

3:40-3:50 **Break**

3:50-4:40 **SAP Update (continued)**

Robin Marcotte, CPA, CFE, ARe, CISA

4:40-4:50 **Closing Remarks/Adjourn**

## Tuesday, August 31, 2010

8:00-9:40 **Reinsurance**

Bryan J. Fuller, CPCU, ARe  
Senior Reinsurance Consultant  
Rector & Associates, Inc.

9:40-9:50 **Break**

9:50-10:40 **Examination of Small Companies**

Noble Consulting Services, Inc.

10:40-10:50 **Break**

10:50-11:40 **Sampling**

Noble Consulting Services, Inc.

11:40-12:30 **Box Lunch — No Program**

12:30-1:20 **Model Audit Rule**

Noble Consulting Services, Inc.

1:20-2:10 **The Patient Protection and  
Affordable Care Act**

Todd Sells  
Director, Financial Regulatory Services  
NAIC

2:10-2:20 **Break**

2:20-3:10 **The Patient Protection and  
Affordable Care Act (continued)**

Todd Sells

3:10-4:25 **Forensics and Valuation Services**

BKD, LLP

4:25-4:35 **Closing Remarks/Adjourn**

## Wednesday, September 1, 2010

8:00-9:40 **Commercial Mortgage-Backed  
Securities (CMBS) Portfolio Review**

Joseph Prakash  
Manager, Investment Research Unit  
NAIC — Securities Valuation Office

9:40-9:50 **Break**

9:50-10:40 **General Insurance Fraud**

Ted Clark  
Director, Anti-Fraud Division  
Kansas Insurance Department

10:40-11:50 **Financial Reform Update**

Todd Sells  
Director, Financial Regulatory Services  
NAIC

11:50-1:00 **Luncheon**

Keynote Address by Kansas Insurance  
Commissioner Sandy Praeger

1:00-1:50 **Prospective Risk & How It  
Relates to Enterprise Risk Management  
(ERM) & Corporate Governance**

RSM McGladrey, Inc.

1:50-2:00 **Break**

2:00-2:50 **Prospective Risk & How It  
Relates to Enterprise Risk Management  
(ERM) & Corporate Governance (continued)**

RSM McGladrey, Inc.

2:50-3:00 **Break**

3:00-3:50 **Effective Use of CPA Work papers  
& Completing the CPA Checklist**

RSM McGladrey, Inc.

3:50-5:05 **Life Reserves/Risk-Focused Exam**  
To Be Announced

5:05-5:10 **Closing Remarks/Adjourn**

## Thursday, September 2, 2010

8:00-9:40 **Accreditation-Best Practices**

Julie Glaszczak, CPA  
Senior Accreditation Manager  
NAIC

9:40-9:55 **Break**

9:55-11:10 **Examination Coordination**

Bruce Jenson, CPA  
Financial Examination Manager  
NAIC

11:10-11:20 **Closing Remarks**

Kenneth Abitz, CFE  
Director, Financial Surveillance  
Kansas Insurance Department

11:20 **Program Adjourns**