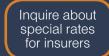


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# EXTRA-CONTRACTUAL & BAD FAITH LIABILITY





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# Views from the Bench



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- State of the market for high profile bad cases and high dollar verdicts across the country: hotbed states including Missouri, Washington, Florida, South Carolina, Georgia
- The ever changing duty to defend and how it's currently leading to bad faith
- Carriers failing to properly investigate claims involving requests for additional insurance coverage
- Creative bad faith set ups: preventive strategies and techniques with regard to open limits, policy limit demands, and time limit demand letters
- Consent judgments: strategies in bad faith claims given the use of consent judgments to box in primary and excess carriers, including "Cunningham" agreement nuances
- Carrier's duty to initiate settlement negotiations in the absence of demand
- Bad faith discovery: what's discoverable, what's not, and what might be deemed discoverable given 2015 FRCP amendments
- The "claim file" in the digital universe: not your father's sectioned paper file with sticky notes and coffee stains
- Dealing with increased requests for corporate witness depositions and preparing company witnesses for testimony
- Overcoming latest challenges with institutional bad faith claims
- Excess coverage/excess policy claims and inter-company bad faith claims
- · Resolving thorny issues with regard to independent Cumis counsel
- Recoupment/reimbursement: balancing between settling cases against the insured while preserving coverage claims for recoupment or reimbursement
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# Day One: Thursday, June 2, 2016

# 7:20 Registration and Continental Breakfast

# 7:55 Co-Chairs' Welcome



Lewis F. Collins, Jr. Butler Weihmuller Katz Craig LLP



David A. Strauss King, Krebs & Jurgens, PLLC

In-House Perspectives on Avoiding Claims; Claims Management Best Practices: Recouping of Defense Costs: Selecting Counsel Given Conflicts Between Insured and Insurer; Managing and Paying an Outside Counsel; and **Jury Trials** 

Meg Weist

Claims Legal

**Rob Tameler** 

**EMC Insurance** 

Claims Manager

Robyn L. Sondak

Travelers Bond &

Paul C. Garrison

**Specialty Insurance** 

Senior Counsel

**Insurance Company** 

Assistant Vice President,

**ALPS Property & Casualty** 

Director, Corporate Litigation

Infinity Insurance Company

#### Allen W. Nelson

Executive Vice President, General Counsel, Corporate Secretary and Chief Administrative Officer **Crawford & Company** 

Sarannah McMurtry

Associate General Counsel **Acceptance Insurance** 

Thomas E. Allison-Couto, Esq. Assistant Vice President Chubb & Son, a division of **Federal Insurance Company** 

Bill Gaydos

Claims Director Advanced Claims Concepts, Inc.

Joshua Kranz Senior Counsel Hiscox

# Moderator:



David A. Strauss King, Krebs & Jurgens, PLLC

9:30 Break

## 9:35

State of the Market for High-Profile Bad Faith Cases and High-Dollar Verdicts Across the Country: Hotbed States Including Missouri, Washington, Florida, South Carolina, Georgia; Key Filing Trends and Rulings; Unfair Trade Practices, Fair Conduct and RICO Developments; and Latest Nuances in Statutory and Punitive Damages



Anthony L. Martin Shareholder Sandberg Phoenix & von Gontard P.C.



Michael K. Kiernan, Esq. Managing Partner, St. Petersburg Traub Lieberman Straus & Shrewsberry LLP



Jacquelyn A. Beatty Shareholder Karr Tuttle Campbell



Diane L. Polscer Managing Partner, Portland Gordon & Polscer, L.L.C

This panel will provide you with the latest developments, emerging issues, trends, and the current pulse of the market and industry. Top outside counsel from hotbed states will give you an in-depth examination of the year's most challenging issues and recommendations for how practitioners can update their litigation strategies in response to the new developments going forward.

#### Topics include:

- Bad Faith across Jurisdictions: recent extra-contractual cases from across the country
- Recent Bad Faith Decisions and key undecided cases
- Treatment of insurers in key jurisdictions including Florida, Missouri, Washington State, South Carolina, Georgia
- Combating increasingly oppressive statutory, regulatory and case law in various states against insurers which makes it too easy to claim "bad faith" and makes it almost impossible for insurers to do business in those iurisdictions
- New causes of action ie: RICO
- Statutory damages A number of statutes have created statutory claims that can be asserted in addition to common law bad faith claims. In Washington, for example, a claim under the Insurance Fair Conduct Act ("IFCA") allows an award of three times the actual damages, and requires an award of attorney fees for a violation of the act. These statutes give insureds significantly more leverage, even on claims that may not have any merit. Further, the construction and application of these statutes have given rise to extensive litigation
- Unfair trade practices laws: the interplay of Unfair Claims Practices Act and claims of bad faith
- Size of the verdicts on the underlying cases; huge dollar verdicts increases the exposure if guess wrong on trial outcomes
- Bad faith punitive damages: Latest Trends and Theories

You will find this session invaluable for getting up to speed on the latest developments, cases, and strategies while maximizing your opportunity to engage in the advanced discussion that is the hallmark of the conference.

The Ever Changing Duty to Defend and How It's Currently Leading to Bad Faith



Linda D. Kornfeld





- · Addressing the return to "traditional" pre-Campbell litigation, where a bad faith claim is appended to a breach of contract claim
- The threat of bad faith claims as a bargaining chip to secure coverage where the underlying litigation is high-dollar, high-stakes litigation
- An increasing number of bad faith suits being filed on higher-limits policies, such as CGL policies
- Courts across the nation view the CGL policy through a revisionist lens and look for ways to liberally apply the same to losses which were never intended to be covered by the CGL. As a result, companies routinely deny claims which appear strong denials which are later revised by judges. This in turn creates a breach of contractual duties and leads to a case of Bad Faith against the insurer. What are the strategies in response to this?



#### 11:25

View From the Bench, Including Insights on the Economic Loss Rule and Contractual Limitations

Hon. Ruben Castillo

U.S. Dist. Ct., N.D. III.

Hon. Joy Flowers Conti

U.S. Dist. Ct., W.D. Pa.

Hon. Nancy F. Atlas

U.S. Dist. Ct., S.D. Tex.

Hon. Donetta W. Ambrose

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Hon. John W. Madden, IV

Colo. 2nd Jud. Dist. Court

A unique opportunity to hear how federal and state judges interpret arguments and evidence in the extra-contractual & bad faith context

#### Moderator



Robert M. Forni, Jr., Esq. Partner Ropers Majeski Kohn & Bentley PC

# **Networking Luncheon**

Carriers Failing to Properly Investigate Claims Involving Requests for Additional Insurance Coverage: The Growth of Bad Faith Claims and Court Expansion of Additional Insured Duty to Defend



Michael J. Cawley Partner Gordon Rees Scully Mansukhani, LLP



Robin Taylor Symons Miami Office Co-Managing Partner Gordon Rees Scully Mansukhani, LLP

- Additional Insured Duty to Defend expansion by courts what's now the nexus for "arising out of"?
- Issues with regard to contracts between one party that agrees to defend and indemnify another party being ignored and coverage denied
  - Claim reps making the decisions not acknowledging the rights of the additional insured under the policy, particularly when it comes to providing a defense. Parties are more understanding of their rights in the face of these denials and Bad Faith claims are growing as a result. What are the best strategies in response to this growth?

3:00 Break

#### 3:05

Creative Bad Faith Set Ups: Preventive Strategies and Techniques with Regard to Open Limits, Policy Limit Demands, and Time Limit Demand Letters



Kevin J. Willging **Executive Counsel Travelers** 



Paul L. Nettleton Shareholder Carlton Fields Jorden Burt, P.A.



Steven Plitt Senior Member The Cavanagh Law Firm

- · Cognizance of bad faith set ups
- Demonstrating your company good faith claim handling: Whether, when and to what extent the insurer has a defense that there is a good faith dispute or that the dispute is reasonably debatable, such that it defeats the bad faith/extra contractual liability claim
- Unreasonable time limit demands as the basis of subsequent bad faith claims - obligations, strategies and techniques
- Responding to policy limit demands
- Policy limits demands and how the improper handling of them can lead to bad faith claims: Does the claim that the demand was a setup provide any protection to an insurer in a bad faith claim?
- Allegations of bad faith failure to settle within policy limits (not necessarily policy limits demands), particularly when the rejection of a settlement demand is due in part or in full to coverage issues
- Continual use of time limit demand letters: do they comply with state statutes?
- Easing anxiety between carriers and insureds and lowering costs of handling litigation given use of demand letters to set up a potential excess recovery and subsequent Bad Faith claim
  - What are the state legislatures and court's ruling on the letters' sufficiency to establish Bad Faith?
  - Dealing with unrealistic demands which fail statutorily because they fail to provide all relevant information in a timely manner to properly review the claims and/or demand

#### 4:00

Consent Judgments: Strategies in Bad Faith Claims Given the Use of Consent Judgments to Box in Primary and Excess Carriers, Including "Cunningham" Agreement Nuances



Lewis F. Collins, Jr. Partner **Butler Weihmuller Katz Craig LLP** 



Jay Barry Harris Attorney Fineman Krekstein & Harris P.C.



Paul R. Koepff Senior Equity Partner Clyde & Co US LLP



- · Addressing insureds anxiety about the risk of a judgment that may be in excess of policy limits or not covered
- Strategies for defending bad faith claims involving consent judgments
- In situations with multiple layers of coverage, the primary insurer pays its policy limits and agrees (with the insured) to a consent judgment in excess of its primary policy limits. This is done without the agreement or approval of the excess carrier. The injured plaintiff then sues the excess carrier for bad faith, alleging a failure to defend. How do you handle these situations?





The insured alleging that it is bad faith for his/her carrier to refuse to
enter into a "Cunningham" agreement when liability is clear or damages
clearly exceed its policy limit. How do you handle these situations?

#### 4:55

Carrier's Duty to Initiate Settlement Negotiations in the Absence of a Demand: What's Considered Bad Faith for Failing to Initiate Settlement Offers Where There is No Demand?



Nicholas J. Boos Partner Sedgwick LLP



Mark S. Shapiro Of Counsel **Akerman LLP** 



Lorelei S. Masters Partner **Perkins Coie LLP** 

#### 5:50

Bad Faith Discovery: What's Discoverable, What's Not, and What Might Be Deemed Discoverable Given the 2015 FRCP Amendments, and How to Adapt to States that Don't Adopt Changes to Federal Rules



Peter Halprin Attorney Anderson Kill P.C.



Matthew J. Sekits Shareholder-in-Charge, Seattle Office Bullivant Houser Bailey PC

- Scope under Rule 26(b)(1) and the impact of proportionality, especially on pattern and practice claims
- ESI protocols and issues
- Discovery disputes-- court conference with letter to the judge vs. 30 page reciprocal motions to compel
- State courts may not adopt the changes to the federal rules and their resources are increasingly restricted. How does this impact bad faith litigation and what can we do to adjust to the new reality?

# 6:35

Conference Adjourns

# Day Two: Friday, June 3, 2016

#### 7:30

Continental Breakfast

#### 8:00

The "Claim File" in the Digital Universe: Not Your Father's Sectioned Paper File Folder with Sticky Notes and Coffee Stains



Kevin M. Quinley CPCU, ARM, AIC Insurance Claim, Risk Management & Productivity Expert Quinley Risk Associates LLC



Lance Albright
Vice President, Claims
QBE North America



Robert K. Scott Partner Newmeyer & Dillion LLP

- What is now considered a "claim file" given new school electronic touchpoints such as IM's, emails, text messages, social media, and cloud data?
- Defensive and offensive claims-specific discovery involving all these electronic touchpoints
- Challenge the over-broad discovery requests involving these electronic touchpoints

#### 8:55

Dealing With Increased Requests for Corporate Witness Depositions and Preparing Company Witnesses for Testimony (at Depositions and Trial): Witness and Preparing Lawyer Strategies



E. Kay Fuller Attorney at Law Martin & Seibert, L.C.



Scott Lewis
Partner
Hedrick, Gardner, Kincheloe & Garofalo, LLP

These depositions present complex challenges and serious potential exposure for a company. Counsel must strategically determine who should represent the corporation at the deposition, how much preparation is sufficient, and how to tackle **privilege issues.** This session will help you explain the key steps for minimizing risk, successfully responding to a deposition notice and selecting and preparing witnesses for the deposition. Discussion will also center around the fact that mergers and acquisitions of insurers may result in the loss of institutional knowledge for 30(b)(6) witness depositions, which may mean that some ESI is institutionally lost or that claim file systems become anachronistic.

#### 9:40

Morning Break

#### 9:50

Overcoming Latest Challenges With Institutional Bad Faith Claims, including Institutional Bad Faith Discovery



Michael A. Monteverde Bressler, Amery & Ross, P.C.



Jon T. Neumann
Partner
Steptoe & Johnson LLP

- Avoiding and defeating latest Institutional Bad Faith Claims, including those related to Adjuster Compensation Plans
- The Use of Institutional Bad Faith Discovery As Leverage To Force Settlements Rather Than Seek Pertinent Information: defending against these broad attacks

#### 10:35

Bad Faith in Relation to Excess Coverage/Excess Policy Claims and Inter-Company Bad Faith Claims



William J. Kobokovich, Jr.
Associate Group General Counsel
Claim Legal Extra Contractual & Reinsurance,
Travelers



Stephen P. Pate Partner Norton Rose Fulbright US LLP

 Duties owed between primary and excess insurers and between insured and the excess carrier

- When can an excess insurer sue a primary insurer for bad faith: availability and viability of an excess vs. primary or lower level bad faith claim
- What are some of the theories upon which one insurer might sue another for bad faith
- What defenses are available to the primary insurer?
- Excess carrier vigilance in safeguarding their rights and fulfilling their duties
- Pro-active involvement by excess carriers
- Counsel retained by excess carriers cognizance of heightened expectations
- · Notice to the excess insurer: When handling claims with excess verdict potential, primary insurers diligence in providing status updates to excess carriers and allowing the excess an opportunity to provide input
- Inter-Company Bad Faith Claims and extra-contractual claims between two carriers -- strategies for defending these claims

#### 11:20

Resolving Thorny Issues With Regard to Independent/Cumis Counsel



Craig L. Reese Attorney at Law Fletcher, Farley, Shipman & Salinas, LLP



David McMahon Attorney at Law Offices of David J. McMahon



Edward J. Currie, Jr. Shareholder Currie Johnson & Myers, P.A

- · When is Independent/Cumis counsel required
- Complications when independent counsel selected by the insured is defending the claim, and when the defense costs skyrocket.
- Practical considerations relating to the defense in light of independent counsel issues where insurers appoint defense counsel who are not experienced in particular areas or staffing limitations interfere with the defense

#### 12:15

Recoupment/Reimbursement: Balancing Between Settling Cases Against the Insured while Preserving Coverage Claims for Recoupment or Reimbursement



Robert N. Kelly Director Jackson & Campbell, P.C.



Gretchen A. Ramos CIPP/US, CIPP/E Partner. Carroll, Burdick & McDonough LLP

# 1:00

**Networking Luncheon** 

# 2:00

The Style, Substance and Dynamics Of Insurance Bad Faith Case Mediations



Arnold Levinson Mediator Levinson Mediation



Doug deVries Mediator

deVries Dispute Resolution/Judicate West

- · Dynamics of negotiation specific to bad faith cases
- Mediator styles and their implications regarding efficacy and ethics in bad faith cases
- · Bad faith case-related valuation and negotiation approaches and strate-

#### 3:00

Negotiating the Tripartite Relationship of Claims Professionals, Defense Attorneys and Policyholder Attorneys: Working Together to Ensure the Ethical Investigation and Defense of a Bad Faith Claim (featuring 30 minutes of CLE-Ethics)



Kenneth P. Carter, CPCU Sr. Corporate Casualty Claim Manager **Merchants Insurance Group** 



Thomas A. Marrinson Partner ReedSmith LLP

Conference Ends

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