

THE FIDELITY AND SURETY LAW COMMITTEE 2026 MIDWINTER CONFERENCE

FROM THE NATION'S CAPITAL: EXPLORING RISKS, CLAIMS AND COMPLEXITY ACROSS THREE SIGNATURE FSLC PROGRAMS

Construction Program: *The Mega Project Effect: Lessons on Navigating Risk and Complexity Across the Construction and Surety Spectrum*

Surety Program: *High Stakes Surety: Reducing Risks and Mastering Claims in the Era of Mega Projects*

Fidelity Program: *Navigating the New Era of Commercial Crime: Bigger Claims, Smarter Criminals, Higher Stakes*

January 21-23, 2026
The JW Marriott
Washington, DC

Midwinter
Meeting 26



AMERICAN BAR ASSOCIATION

Tort Trial and Insurance
Practice Section

WELCOME FROM THE FSLC CHAIR

On behalf of the Fidelity and Surety Law Committee, it is my privilege to invite you to attend the 2026 FSLC Midwinter Meetings and Conference in Washington, DC on January 21 through 23, 2026, where professionals across construction, surety, and fidelity will gather to tackle today's most pressing challenges. Set against the nation's capital—a city of iconic monuments, timeless architecture, and enduring inspiration—our three signature programs provide unmatched opportunities to gain practical insights, connect with industry leaders and colleagues, and navigate the challenges of today while preparing for tomorrow.

Construction and Surety Programs—Mega Projects in Focus

This year, we're tackling **mega projects**—construction ventures exceeding \$1 billion—and their impact across the construction and surety spectrum. With project size and complexity growing rapidly and trillions of dollars in public work-in-place, the stakes have never been higher. Surety bonds underpin these massive projects, with the attendant risks of complex and high-exposure claims and disputes. Panels will explore this high-stakes landscape from practical, technical, and legal perspectives, providing lessons and strategies that are applicable across projects of all shapes and sizes.

Construction Program: The Mega Project Effect: Lessons on Navigating Risk and Complexity Across the Construction and Surety Spectrum—

The Construction Program will highlight mega projects and apply the lessons learned into strategies for controlling risk and achieving successful outcomes across construction projects of all types and scale. Speakers include leaders from some of the nation's largest contractors involved in delivering complex mega projects, public owners, engineering firms, construction and surety attorneys, and in-house claim professionals. Panels will explore delivery methods, the design relationship, alternative design arrangements such as delegated design and design-assist, differing site conditions, and scheduling and delay. The program will conclude with a special presentation addressing emerging threats from cyber risk and mitigation strategies for today's increasingly digital construction environment.

Surety Program: High Stakes Surety: Reducing Risks and Mastering Claims in the Era of Mega Projects—

As sureties increasingly bond larger projects, the effects flow down to middle and smaller contractors. This program addresses the unique and heightened risks of mega-projects from the perspective of the surety—with front-end risk management insights from leading surety company executives to back-end claims handling and litigation management strategies for high-dollar disputes. Sessions will explore the surety investigation process, completion alternatives by the surety, comprehensive recovery and subrogation rights of the surety, and a special session on trial strategies with insights from industry-leading jury consultants. We will also feature a full panel of judges from federal and state courts, providing candid insights on effective trial strategies, emerging legal trends, best practices in courtroom advocacy, judicial decision-making, advice for young lawyers, and other wisdom from their view on the bench. The program emphasizes lessons from mega projects

that can be applied to improve risk management and claims handling on projects and claims of any size.

Fidelity Program - Navigating the New Era of Commercial Crime: Bigger Claims, Smarter Criminals, Higher Stakes

Commercial crime claims have overtaken financial institution bond matters as the primary focus of fidelity professionals. These claims are not only more numerous than ever before, but they also involve larger exposures and increasingly sophisticated schemes. Fraudsters are leveraging emerging technologies at light speed, while insureds' efforts to protect against their schemes are not keeping pace.

This program features an updated edition of the ***Commercial Crime Insurance Claims*** book—its first revision in more than a decade—and brings together distinguished speakers to examine today's most significant substantive issues under commercial crime policies. Attendees will gain insight into the most common challenges facing insurers in 2026 and beyond, and will learn practical strategies for navigating this fast-changing claims environment. Essential for claims professionals, outside counsel, and consultants alike, this program offers valuable guidance for both newcomers to the field and seasoned veterans.

Don't Miss our Annual Business and Leadership Meetings on Wednesday, January 21, 2026: On Wednesday, January 21, 2026, we have a full day of FSLC Business and Leadership meetings, including meetings among each of the Divisions and numerous subcommittee meetings. As set forth more fully in the Agenda of FSLC Business Meetings in this Brochure, these in-person meetings provide a meaningful opportunity to connect with each other while we discuss and plan the expansive activities that make FSLC such a vibrant and impactful organization. We especially encourage all FSLC Members to attend the FSLC Vice-Chairs and Leadership Meeting at 3:00 PM, as this is the best opportunity to fully see and appreciate the spirit and dedication of the extraordinary group of committed leaders and contributors that drive the success of the FSLC.

Presentation of the Martin J. Andrew Award: A highlight of our annual meeting is the Martin J. Andrew Award presentation on Thursday morning, celebrating a remarkable member of the Committee. As Chair, I am deeply honored to recognize someone whose dedication and lifetime contributions have helped shape and strengthen this great organization.

Connect with Colleagues and Friends: The Midwinter Conference offers a unique opportunity to foster meaningful connections—whether building new relationships, strengthening existing ones, or creating friendships that endure. To support this, we have several events planned:

- **Wednesday Evening:** The Young Professionals and Diversity & Inclusion Subcommittees will host a “Dutch Treat” dinner, followed by a special event. Further details will be announced shortly.
- **Thursday Evening:** Join us for the traditional **Welcome Reception**, open to all attendees.

- **Friday Morning:** The Women's Involvement Subcommittee will host its annual breakfast, a highly regarded event not to be missed.

Thank You FSLC Sponsors: We are fortunate to have a dedicated group of Sponsors whose support is essential to making this important conference possible. Please take a moment to visit our exhibitors and Sponsors and express your appreciation for their generous contributions.

Register Now: Please register and make your hotel reservation as soon as possible. As always, our room block will fill up fast, and we want you to enjoy all the hotel has to offer. More details are in the brochure and on the FSLC website (ambar.org/fslc).

I look forward to seeing you in Washington, DC.

Bruce L Corriveau
FSLC Chair



AGENDA

FSLC BUSINESS MEETING

WEDNESDAY, JANUARY 21, 2026

8:00 AM – 10:00 AM	FSLC Past Chairs Breakfast and Meeting
9:00 AM – 4:00 PM	Fidelity School
10:00 AM – 3:00 PM	Surety and Fidelity Association of America—Surety Claims Advisory Committee Meeting <i>Surety 10:00 AM–12:00 PM and Fidelity 1:00 PM–3:00 PM (BY INVITATION ONLY)</i>
10:00 AM – 6:00 PM	TIPS FSLC Advance Registration
10:00 AM – 6:00 PM	FSLC Construction Program Rehearsal Room
10:00 AM – 6:00 PM	FSLC Fidelity Program Rehearsal Room
10:00 AM – 6:00 PM	FSLC Surety Program Rehearsal Room
10:00 AM – 11:00 AM	FSLC Membership Division Meeting
10:30 AM – 11:30 AM	FSLC Law Division Meeting
11:00 AM – 12:00 PM	FSLC Communications Division Meeting
1:00 PM – 2:00 PM	COMBINED FSLC Young Professionals Involvement Subdivision Meeting and FSLC Diversity and Inclusion Subdivision Meeting
1:30 PM – 2:30 PM	FSLC Book Marketing Meeting
1:30 PM – 2:30 PM	2027 Midwinter Conference Planning Meeting
1:45 PM – 2:30 PM	FSLC Underwriting and Risk Management Subdivision Meeting
1:45 PM – 2:45 PM	2026 Spring Surety Planning Meeting
2:00 PM – 2:45 PM	FSLC Women Involvement Subdivision Meeting
2:15 PM – 2:50 PM	FSLC Construction Subdivision Meeting
3:00 PM – 5:00 PM	FSLC Vice-Chairs and Leadership Meeting <i>(All FSLC Members are Welcome to Attend)</i>
5:00 PM – 6:00 PM	Cocktail Party for FSLC Vice Chairs, Past Chairs, Division Chairs, Co-Chairs, Committee Leadership, and their guests
7:00 PM	Young Professionals (YPS) and Diversity and Inclusion Dutch Treat Dinner
9:00 PM	YPS and Diversity and Inclusion Event <i>(More details to come!)</i>

THURSDAY, JANUARY 22, 2026

7:00 AM	Registration and Breakfast for Construction Program
8:00 AM	General Assembly
8:00 AM – 8:15 AM	FSLC Chair and TIPS Section Chair Welcome & Introductory Remarks

8:15 AM – 8:30 AM	Presentation of the Martin J. Andrew Award
8:30 AM – 8:35 AM	5 Minute Transition
8:35 AM – 12:00 PM	Construction Program
8:45 AM – 12:00 PM	Fidelity Program
9:00 AM – 5:00 PM	Surety Program Rehearsal
10:15 AM – 10:30 AM	Morning Break for Fidelity
10:20 AM – 10:35 AM	Morning Break for Construction
12:00 PM – 1:40 PM	Lunch
1:45 PM – 3:10 PM	Fidelity Program
1:45 PM – 3:15 PM	Construction Program
3:10 PM– 3:30 PM	Afternoon Break for Fidelity and Transition to Plenary Session
3:15 PM – 3:30 PM	Afternoon Break for Construction
3:30 PM – 5:00 PM	PLENARY SESSION for Construction and Fidelity Programs
5:00 PM – 5:30 PM	Speakers and YPS/New Members Cocktail Reception (<i>Only Company Professionals, New FSLC Members, Young Professionals, Sub-Committee Members, and FSLC Past Chairs are invited to attend.</i>)
5:00 PM – 5:30 PM	International Surety and Fidelity Cocktail Party
5:30 PM – 6:30 PM	Fidelity and Surety Law Committee Welcome Reception

FRIDAY, JANUARY 23, 2026

7:00 AM – 8:15 AM	Women's Networking Breakfast
7:30 AM – 8:30 AM	Breakfast
8:15 AM – 10:05 AM	Surety Program
8:30 AM – 10:05 AM	Fidelity Program
10:05 AM – 10:20 AM	Morning Break for Fidelity Program and Transition to Plenary Session
10:05 AM – 10:20 AM	Morning Break for Surety Program
10:20 AM – 12:00 PM	PLENARY SESSION for Surety and Fidelity Programs
12:00 PM – 1:40 PM	Lunch
1:40 PM – 4:30 PM	Surety Program
3:10 PM – 3:25 PM	Afternoon Break for Surety Program
4:30 PM	Closing

FACULTY

CONSTRUCTION PROGRAM

CONSTRUCTION—The Mega Project Effect: Lessons on Navigating Risk and Complexity Across the Construction and Surety Spectrum

Hanna Blake

*Program Co-Chair
Watt Tieder Hoffar
Fitzgerald
McLean, VA*

Amanda Marutzky

*Program Co-Chair
Watt Tieder Hoffar
Fitzgerald
Irvine, CA*

Brittany Rose

*Program Co-Chair
Travelers Bond & Specialty
Insurance
Federal Way, WA*

Chuck Andary

*Windsor-Detroit Bridge
Authority
Windsor, Ontario, Canada*

Brandon Bains

*Bains Law, PLLC
Aledo, TX*

Matthew Baker

*Watt Tieder Hoffar
Fitzgerald
McLean, VA*

Shavonne Bogan

*Gallagher
Houston, TX*

Jonathan Burwood

*Watt Tieder Hoffar
Fitzgerald
Boston, MA*

John Fouhy

*Travelers Bond & Specialty
Insurance
Federal Way, WA*

Chuck Freiheit

*F.H. Paschen
Chicago, IL*

Rudolph Frizzi

*Langan Engineering &
Environmental Services
Parsippany, NJ*

James Gibson

*Liberty Mutual Insurance
Company
Plymouth, PA*

Brad Gordon

*Gilbane Building Company
Providence, RI*

Robert Graham, Jr.

*Paskert Divers Thompson
Tampa, FL*

James Granstra

*The Vertex Companies,
LLC
Austin, TX*

Brian Gunther

*Rivkin Radler LLP
New York, NY*

Jeff Jessamine

*Balfour Beatty
Los Angeles, CA*

Price Jones

*Liberty Mutual Insurance
Company
Plymouth, PA*

Shahab Kamrad

*Turner Construction
Company
New York, NY*

Jeff Katz

*The Vertex Companies,
LLC
New York, NY*

Maura Kelly

*McCarthy Holdings, Inc.
St. Louis, MO*

Shawn Kelly

*Travelers Bond & Specialty
Insurance
Nashville, TN*

Melissa Lee

*Manier & Herod
Cockeysville, MD*

Lauren McLaughlin

*Southland Industries
Sterling, VA*

Kevin Mekler

*Cipriani & Werner, PC
Philadelphia, PA*

Jen Moore

*Travelers Bond & Specialty
Insurance
Flowood, MS*

Leah Pilconis

*The Associated General
Contractors of America
Baltimore, MD*

Dana Pomeroy

*The Whiting-Turner
Contracting Company
Baltimore, MD*

Michael Prisco

*Rivkin Radler LLP
New York, NY*

Peter Simonsen

*Gallagher
Chicago, IL*

AGENDA

CONSTRUCTION PROGRAM

Diane Utz

Utz Construction Law, LLC
Denver, CO

Meera Wagman

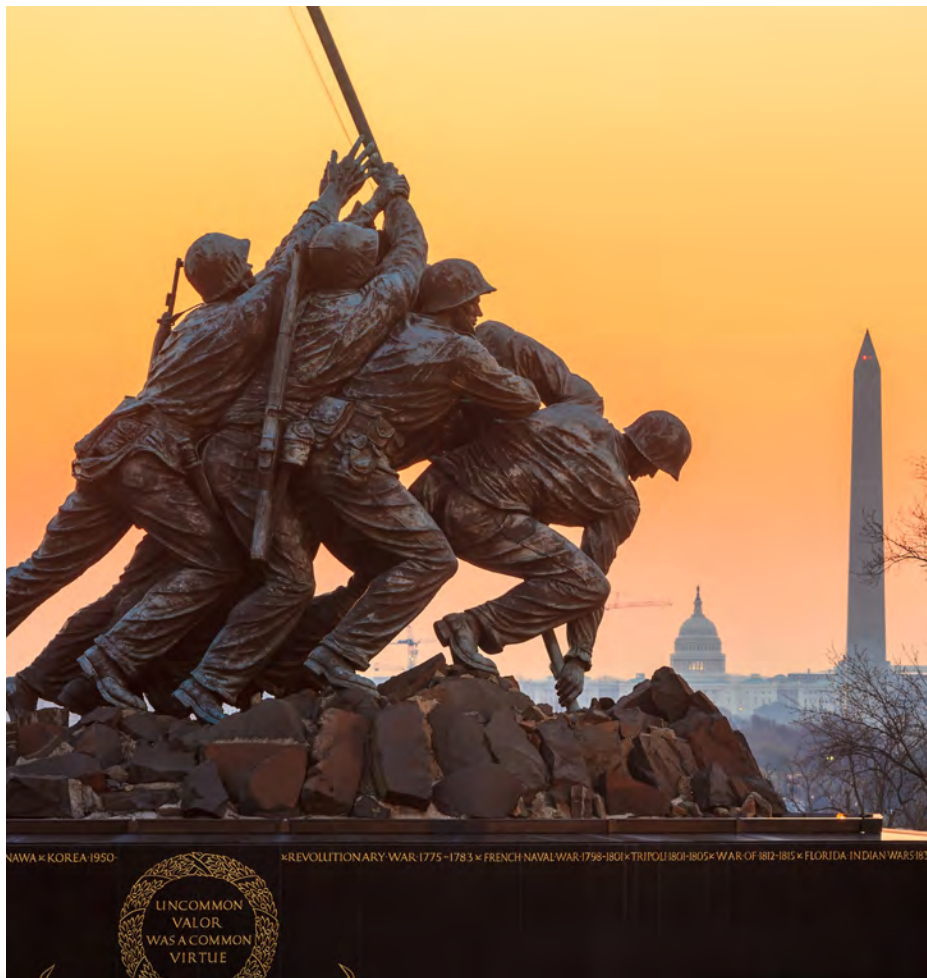
Secretariat
New York, NY

Susan Weinstock

Arch Insurance Company
Baltimore, MD

Lauren Winchester

*Travelers Bond & Specialty
Insurance*
Blue Bell, PA



AGENDA

CONSTRUCTION PROGRAM

continued

THURSDAY, JANUARY 22, 2026

- 7:00 AM – 8:30 AM **CONTINENTAL BREAKFAST**
- 8:00 AM – 8:15 AM **FSLC CHAIR WELCOME & INTRODUCTORY REMARKS**
SPEAKER: **Bruce Corriveau**, *FSLC Committee Chair, Travelers Bond & Specialty Insurance, Cockeysville, MD*
Marcy Greer, *Chair, Tort Trial & Insurance Practice Section*
- 8:15 AM – 8:30 AM **PRESENTATION OF THE MARTIN J. ANDREW AWARD**
- 8:30 AM – 8:35 AM **5 MINUTE TRANSITION**
- 8:35 AM – 8:45 AM **INTRODUCTION AND WELCOME REMARKS**
SPEAKERS: **Hanna Blake**, *Program Co-Chair, Watt Tieder Hoffar Fitzgerald, McLean, VA*
Amanda Marutzky, *Program Co-Chair, Watt Tieder Hoffar Fitzgerald, Irvine, CA*
Brittany Rose, *Program Co-Chair, Travelers Bond & Specialty Insurance, Federal Way, WA*
- 8:45 AM – 9:35 AM **MEGA PROJECTS: PERSPECTIVES FROM INDUSTRY LEADERS**
Join leading executives and general counsel from several of the nation's top construction firms—alongside The Associated General Contractors—for a candid discussion on the challenges and complexities of managing mega projects. These large-scale ventures, often exceeding hundreds of millions or even billions of dollars, present unique risks and opportunities that demand both mastery of the fundamentals and adoption of cutting-edge strategies. Panelists will share real-world experiences and examine how the scale of mega projects reshapes traditional approaches to risk management and mitigation, while highlighting the technologies, processes, and systems driving the industry forward. Attendees will gain a candid look at what it takes to navigate the logistical and operational demands of these massive undertakings. Whether you're a contractor, consultant, surety, or legal advisor, this panel offers valuable perspectives on the evolving landscape of high-stakes construction.
SPEAKERS: **Melissa Lee**, *Principal, Manier & Herod, Nashville, TN*
Chuck Freiheit, *Chief Operating Officer, F.H. Paschen, Chicago, IL*
Brad Gordon, *EVP, General Counsel and Secretary, Gilbane Building Company, Providence, RI*
Leah Pilconis, *General Counsel, The Associated General Contractors of America, Arlington, VA*

AGENDA

CONSTRUCTION PROGRAM

continued

9:35 AM – 10:20 AM

STRATEGIC PROJECT DELIVERY FOR THE MEGA PROJECT: A LEGAL AND PRACTICAL BUSINESS ANALYSIS OF BILLION-DOLLAR VENTURES

The stakes for assembling the project team for a mega project could not be higher. This panel will discuss from both a legal and business perspective, the various project delivery methods and their attendant contractual structure, risk allocation, and dispute potential. Panelists will provide their valuable insight on the effectiveness of each method, as well as current trends shaping the mega-project space.

SPEAKERS: **Robert Graham, Jr., Shareholder, Paskert Divers**
Thompson, Tampa, FL
Chuck Andary, Chief Legal Officer, Windsor-Detroit
Bridge Authority, Windsor, Ontario, Canada
James Gibson, Senior Vice President of Surety Claims,
Liberty Mutual Insurance Company, Plymouth, PA
Jeff Jessamine, Project Director, Mega-Projects, Balfour
Beatty, Los Angeles, CA
Jen Moore, National Underwriting Officer, Travelers
Bond & Specialty Insurance, Flowood, MS

10:20 AM – 10:35 AM

BREAK

10:35 AM – 11:20 AM

THE DESIGN RELATIONSHIP-STANDARDS OF CARE, SUB-DESIGNER RELATIONSHIPS, AND EVOLVING TECHNOLOGIES

Before a project can rise up and demonstrate just how “mega” it can be, there is design. And the core traits that define mega-project construction-scale, complexity, novelty—are first born and raised by the design professionals. The structure and management of that design team over the considerable lifecycle of a mega-project requires a dynamic balance of old-school risk management and break-neck innovation. This program will detail how traditional standards of care and risk management for design professionals are influenced considerably by mega projects, and explores the necessity to enhance and reorient mega-project design relationships. The panel will further highlight innovative technologies design teams must employ in a competent and cooperative manner for mega project design to succeed.

SPEAKERS: **Jonathan Burwood, Senior Partner, Watt Tieder Hoffar**
Fitzgerald, Boston, MA
Shawn Kelly, Managing Director & Counsel, Travelers
Bond & Specialty Insurance, Cockeysville, MD
Lauren McLaughlin, Vice President, General Counsel,
Southland Industries, Sterling, VA
Dana Pomeroy, Division Vice President, Design
Management, The Whiting-Turner Contracting
Company, Baltimore, MD

AGENDA

CONSTRUCTION PROGRAM

continued

11:20 AM – 12:00 PM

CONQUERING COMPLEXITY AND STRUCTURING SUCCESS: MEGA PROJECTS IN A WORLD OF CHANGE

This session brings together top industry leaders to explore one of the most pressing issues in today's construction landscape: the shifting balance of risk between designers, contractors, and owners on mega projects. Attendees will gain clarity on the evolving roles of value engineering, design assist, and delegated design—and why “cheaper” solutions are not always better. The panel will examine current trends in project risk allocation, including the perspectives of the designer, contractor, surety, and consultant, and will highlight both successful outcomes and costly missteps. Through discussion of case studies and real-world examples, participants will walk away with practical insights and legal best practices to better structure contracts, allocate risk fairly, and avoid devastating consequences.

SPEAKERS: **Diane Utz, Owner**, *Utz Construction Law, LLC*, Denver, CO
Maura Kelly, Vice President & Associate General Counsel, *McCarthy Holdings, Inc.*, St. Louis, MO
Meera Wagman, Managing Director, *Secretariat*, New York, NY
Susan Weinstock, AVP Surety Claims, *Arch Insurance Company*, Baltimore, MD

12:00 PM – 1:40 PM

LUNCH-ON YOUR OWN

1:40 PM – 1:45 PM

WELCOME BACK

1:45 PM–2:30 PM

BENEATH THE SURFACE: DIFFERING SITE CONDITIONS ON MEGA PROJECTS

Differing Site Conditions (“DSC”) can create significant risks on any project, but given the scope and complexity of a mega project, those risks grow exponentially. The panel will provide an overview of the law regarding distribution of risk for DSCs, recent trends and developments in the law, and best practices to circumvent the DSC risks on mega projects.

SPEAKERS: **Matthew Baker, Partner**, *Watt Tieder Hoffar Fitzgerald*, McLean, VA
John Fouhy, Technical Director & Counsel, *Travelers Bond & Specialty Insurance*, Federal Way, WA
Rudolph Frizzi, Managing Principal, *Langan Engineering & Environmental Services*, Parsippany, NJ
James Granstra, Managing Director, *The Vertex Companies, LLC*, Austin, TX

AGENDA

CONSTRUCTION PROGRAM

continued

2:30 PM – 3:15 PM

SCHEDULING AND ACCOUNTING PRACTICES FOR MEGA PROJECT SUCCESS

Mega projects require deployment of significant capital, management of large workforces, and often high risk begetting high reward. While the design or the scale of such projects may make the headlines, project controls fundamentals ensure the success of these projects. Successful projects are often benchmarked with robust project controls, including strong schedule and accounting practices. The panel will focus on scheduling and including the foundations of good schedules and proper schedule updates, software and technology on mega projects. The panel will then discuss accounting on mega projects, covering cost control fundamentals, structuring project cost records, joint venture arrangements, cost reporting tracking, and recovery and documenting for damages claims.

SPEAKERS: **Brandon Bains, Partner, *Bains Law, PLLC*, Aledo, TX**
Price Jones, Surety Accounting Analyst, *Liberty Mutual Insurance Company*, Plymouth, PA
Shahab Kamrad, Vice President, Director of Claims and Litigation, *Turner Construction Company*, New York, NY
Jeff Katz, Senior Managing Director, *The Vertex Companies, LLC*, New York, NY

3:15 PM – 3:30 PM

BREAK

3:30 PM – 5:00 PM

PLENARY SESSION: CYBER RISKS ON CONSTRUCTION MEGA PROJECTS IN THE EMERGING WORLD OF ARTIFICIAL INTELLIGENCE

Cyber risks and AI on construction projects have the potential to cost project participants an enormous amount of time and money. Understanding and protecting against those risks is critical in the modern age of construction. This experienced panel will discuss the risks and emerging trends of cybercrime and AI, the potential utility of AI, and means of protecting surety, fidelity and underwriting professionals from the risks inherent in these emerging technologies.

SPEAKERS: **Brian Gunther, Partner, *Rivkin Radler LLP*, New York, NY**
Michael Prisco, Partner, *Rivkin Radler LLP*, New York, NY
Shavonne Bogan, Senior Cyber Claims Advocate, *Gallagher*, Houston, TX
Kevin Mekler, Partner, *Cipriani & Werner, PC*, Philadelphia, PA
Peter Simonsen, Area Assistant Vice President, Director-Cyber Liability, *Gallagher*, Chicago, IL
Lauren Winchester, Head of Cyber Risk Services, *Travelers Bond & Specialty Insurance*, Blue Bell, PA

FACULTY

SURETY PROGRAM

SURETY—High Stakes Surety: Reducing Risks and Mastering Claims in the Era of Mega Projects

Bruce Corriveau

*FSLC Committee Chair
Travelers Bond & Specialty
Insurance
Cockeysville, MD*

Alberta “Ali” Adams

*Program Co-Chair
Paskert Divers Thompson
Tampa, FL*

Jessica Derenbecker

*Program Co-Chair
Skyward Specialty
Insurance
New Orleans, LA*

Drew Gentsch

*Program Co-Chair
Whitfield & Eddy, P.L.C.
Des Moines, IA*

Hon. Michel Simon

*United States District Court
Judge, Dist. OR*

Hon. Jeri K. Somers (ret.)

*Chief Judge, United States
Civilian Board of Contract
Appeals*

Hon. Judith Wheat

*Judge, 17th Judicial Circuit
Arlington/Falls Church, VA*

Hon. Melody Wilkinson

*Judge, 17th Judicial District
Ft. Worth, TX*

Christine Alexander

*Arch Insurance Company
Philadelphia, PA*

Julie Alleyne

*Surety & Fidelity
Association of America
Hartford, CT*

Adam Boesen

*Boesen Litigation
Consulting
Austin, TX*

Galina Davidoff

*Davidoff Consulting
Chestnut Hill, MA*

Matt Davis

*Paskert Divers Thompson
Tampa, FL*

Mark Degenaars

*The Vertex Companies
Irvine, CA*

CharCretia DiBartolo

*Liberty Mutual Surety
Marblehead, MA*

Brett Divers

*Paskert Divers Thompson
Tampa, FL*

David Ehrlich

*Coastal Construction
Tampa, FL*

Brian Fern

*Travelers Bond & Specialty
Insurance
Hartford, CT*

Jennifer Fiore

*Dunlap Fiore, L.L.C.
Baton Rouge, LA*

Jacob Fulmer

*Travelers Bond & Specialty
Insurance
Hartford, CT*

Rebecca Glos

*Watt, Tieder, Hoffar &
Fitzgerald, L.L.P.
Irvine, CA*

Leigh Anne Henican

*Gray Surety
Mandeville, LA*

Bryce Holzer

*Travelers Bond & Specialty
Insurance
Federal Way, WA*

Christopher Joseph

*Adams & Reese, L.L.P.
New Orleans, LA*

David Krebs

*Krebs Farley, P.L.L.C.
New Orleans, LA*

Jim Marr

*J.S. Held
Greenwood Village, CO*

William McConnell

*The Vertex Companies
Denver, CO*

Munther Shamieh

*J.S. Held
San Antonio, TX*

Robyn Sondak

*Travelers Bond & Specialty
Insurance
Hartford, CT*

Eric Stickle

*Chubb Limited
White House Station, NJ*

Christopher Ward

*Clark Hill P.L.C.
Dallas, TX*

Michael Whelan

*Walsh Group
Chicago, IL*

Nathan Zangerle

*Liberty Mutual Surety
Philadelphia, PA*

Kim Zanotta

*Travelers Bond & Specialty
Insurance
Cockeysville, MD*

AGENDA

SURETY PROGRAM

FRIDAY, JANUARY 23, 2026

8:15 AM – 8:30 AM

INTRODUCTION AND WELCOME REMARKS

SPEAKERS: **Bruce Corriveau, FSLC Committee Chair**, *Travelers Bond & Specialty Insurance*, Cockeysville, MD
Jessica Derenbecker, Co-Chair, *Skyward Specialty Insurance*, New Orleans, LA
Ali Adams, Co-Chair, *Paskert Divers Thompson*, Tampa, FL
Drew Gentsch, Co-Chair, *Whitfield & Eddy, P.L.C.*, Des Moines, IA

8:30 AM – 9:20 AM

NAVIGATING CHALLENGES AND MAXIMIZING OPPORTUNITIES: RISKS AND CONSIDERATIONS IN UNDERWRITING MEGA PROJECTS

Join us for an insightful discussion that explores the complex world of how sureties use the underwriting process to manage risk on mega projects. As these large-scale ventures continue to shape industries and economies, understanding the unique risks and considerations associated with them is crucial for success. In this session we will explore the defining characteristics of mega projects, discuss how to identify and assess the diverse risks associated with these projects (including financial and operational factors), and explore effective strategies for managing risks at the front end, during the underwriting process, to ensure future potential challenges are identified, understood and mitigated.

SPEAKERS: **Kim Zanotta**, *Travelers Bond & Specialty Insurance*, Cockeysville, MD
Jacob Fulmer, *Travelers Bond & Specialty Insurance*, Hartford, CT
Nathan Zangerle, *Liberty Mutual Surety*, Philadelphia, PA
Julie Alleyne, *Surety & Fidelity Association of America*, Hartford, CT
Eric Stickle, *Chubb Limited*, White House Station, NJ

AGENDA

SURETY PROGRAM

continued

9:20 AM – 10:05 AM

INVESTIGATING THE MEGA-CLAIM: IDENTIFYING AND BUILDING DEFENSES

Mega-project claims present unique challenges that require a strategic and disciplined investigation. The resulting claims can be overwhelming in size and complexity. This panel will explore the immediate steps a surety must take to evaluate exposure, including reviewing bond requirements, coordinating with co-sureties, assessing the principal's financial health, and leveraging advanced technologies. Panelists will also address the process for identifying potential defenses, the role of joint venture and project agreements, early expert involvement, and strategies for securing key employees and subcontractors. The panel will provide practical guidance on documenting claims, navigating multi-prime issues, and analyzing impactful contract provisions to build effective defenses from the outset.

SPEAKERS: **Brett Divers**, *Paskert Divers Thompson*, Tampa, FL
David Ehrlich, *Coastal Construction*, Tampa, FL
CharCretia DiBartolo, *Liberty Mutual Surety*, Marblehead, MA
Christopher Joseph, *Adams & Reese, L.L.P.*, New Orleans, LA
Mark Degenaaers, *The Vertex Companies*, Irvine, CA

10:05 AM – 10:20 AM

BREAK

10:20 AM – 11:10 AM

COURT IS IN SESSION-JUDICIAL TIPS FROM THE BENCH

This esteemed panel of judges will provide invaluable insights regarding the keys to effective advocacy to the court and juries. Drawing on their substantial experience and unique perspectives, this panel will provide guidance on effective trial strategies, best practices in the courtroom, and other trial advocacy topics. The judges will also discuss their approaches to judicial decision-making, their views on emerging legal trends, risk evaluation when faced with a trial, and their advice to young lawyers. Additionally, the panel will provide their suggestions on how best to approach unique fidelity and surety topics that may be foreign to judges and juries.

SPEAKERS: **Christopher Ward, Moderator**, *Clark Hill, P.L.C.*, Dallas, TX
Hon. Michel Simon, *United States District Court Judge*, D. Oregon
Hon. Jeri K. Somers (ret.), *Chief Judge, United States Board of Civilian Contract Appeals*
Hon. Judith Wheat, *Judge, 17th Judicial Circuit*, Arlington/Falls Church, Virginia
Hon. Melody Wilkinson, *Judge, 17th Judicial District*, Ft. Worth, Texas

AGENDA

SURETY PROGRAM

continued

11:10 AM – 11:50 AM

VISION 100: HONORING OUR LEGACY, INSPIRING OUR FUTURE—A CONVERSATION WITH FSLC CHAIRS, PAST, PRESENT AND FUTURE

For over ninety years, the Fidelity and Surety Law Committee of the ABA has been guided by exceptional Chairs and has helped shape the evolution of fidelity and surety law. Through landmark publications, influential advocacy, educational programs, and a national network of experts, FSLC has advanced the practice and raised the standards of our profession. As we approach FSLC's centennial in 2033, *Vision 100* invites you to join a rare and compelling conversation with the leaders who shaped FSLC's past, guide its present, and will carry its future. Moderated by current Chair Bruce Corriveau, this distinguished panel of past and upcoming Chairs will share insights from decades of legal evolution, professional challenges, and industry transformation. They will reflect on pivotal moments in FSLC's history and discuss how the Committee is preparing the next generation of leaders.

MODERATOR: **Bruce Corriveau, Moderator, Travelers Bond & Specialty Insurance, Cockeysville, MD**

11:50 AM – 1:40 PM

LUNCH



1:40 PM – 2:25 PM

THE SURETY'S COMPLETION OF A MEGA-PROJECT AND THE FACTORS AFFECTING THE DECISION MAKING PROCESS

While a default/termination of a mega-project has similarities to other default/terminations, given the size, complexity, high profile, and special factors that are commonly associated with a mega-project, the in-house investigation team has a lot to consider. The results of the Surety's ongoing investigation will likely shape aspects of the completion decision making process. This panel consisting of surety in-house representation, consultants, legal representation, and construction contractors will delve into issues such as the understanding of the parties, financial considerations, technology and the management of the message, and how each of these can affect the completion decision. The panel will also discuss the various completion options, and how these factors can shape the ultimate election by the surety in addressing the claim.

SPEAKERS: **Brian Fern**, *Travelers Bond & Specialty Insurance*, Hartford, CT
William McConnell, *The Vertex Companies*, Denver, CO
Michael Whalen, *Walsh Group, Building Division*, Chicago, IL
Munther Shamieh, *JS Held*, San Antonio, TX
Rebecca Glos, *Watt, Tieder, Hoffar & Fitzgerald, L.L.P.*, Irvine, CA

2:25 PM – 3:10 PM

CLAIM IT BACK: THE SURETY'S GUIDE TO MEGA PROJECT LOSS RECOVERY

Mega projects promise mega opportunities—but they can also deliver mega losses. This presentation discusses strategies performance bond sureties use to recover losses from all parties involved in major construction projects. You'll gain insider knowledge on leveraging insurance policies including general liability, subcontractor default insurance, builder's risk, OCIP, CCIP, pollution and professional liability coverages, and identifying recovery options that are often overlooked. Finally, the panel will discuss real world examples of where these strategies have worked, leading to millions of dollars in recovery for sureties. Don't let potential recovery opportunities slip through your fingers—arm yourself with the knowledge to mitigate mega losses.

SPEAKERS: **Leigh Anne Henican**, *Gray Surety*, Mandeville, LA
Bryce Holzer, *Travelers Bond & Specialty Insurance*, Federal Way, WA
Matt Davis, *Paskert Divers Thompson*, Tamps, FL
Jennifer Fiore, *Dunlap Fiore, L.L.P.*, Baton Rouge, LA

AGENDA

SURETY PROGRAM

continued

3:10 PM – 3:25 PM

BREAK

3:25 PM – 4:15 PM

THE MEGA TRIAL: LITIGATION TIPS FROM THE PROS

Surety cases are complex and involve concepts unfamiliar to judges and juries. This talented panel of trial experts will provide insight and tips from framing the dispute in discovery, preparation the case for trial, selecting the jury, telling the surety's story and persuading the trier of fact to render a verdict in your favor.

SPEAKERS: **Robyn Sondak**, *Travelers Bond & Specialty Insurance*, Hartford, CT

Christine Alexander, *Arch Insurance Company*, Philadelphia, PA

Galina Davidoff, *Davidoff Consulting*, Chestnut Hill, MA

David Krebs, *Krebs Farley, P.L.L.C.*, New Orleans, LA

Jim Marr, *J.S. Held*, Greenwood Village, CO

Adam Boesen, *Boesen Litigation Consulting*, Austin, TX

4:15 PM – 4:30 PM

CLOSING REMARKS



FACULTY

FIDELITY PROGRAM

FIDELITY—Navigating the New Era of Commercial Crime: Bigger Claims, Smarter Criminals, Higher Stakes

Gerald Carozza

Liberty Mutual Insurance Company
Seattle, WA

Gauri Chopra

Berkshire Hathaway Specialty Insurance
Chicago, IL

Sarah Riedl Clark

AIG
Chicago, IL

Claire M. Diallo

Chiesa Shahinian & Giantomasi PC
Roseland, NJ

Judith Edwards

Coaction Specialty Insurance Group
Morristown, NJ

Matt J. Farley

Krebs Farley
New Orleans, LA

Adam P. Friedman

Program Co-Chair
Chiesa Shahinian & Giantomasi PC
Roseland, NJ

Mark S. Gamell

Torre, Lentz, Gamell, Gary & Rittmaster
Jericho, NY

Sarah Gurka

Gallagher
Whippany, NJ

Jasleen Grewal

Dinsmore & Shohl
Chicago, IL

Alison E. Kowal

Old Republic Professional
Chicago, IL

Kim Jackson

Bovis, Kyle, Burch & Medlin, LLC
Atlanta, GA

Jordan Miller

Mills Law Group
Tampa, FL

Holly Naehritz

Clark Hill
Dallas, TX

Laura Nigro

ABA Insurance Services
Shaker Heights, OH

Joseph A. Oliva

Goldberg Segalla
New York, NY

Jonathan S. Ord

Krebs Farley
New Orleans, LA

Scott L. Schmookler

Gordon Rees Scully Mansukhani
Chicago, IL

Angela Sullivan

Program Co-Chair
Gordon Rees Scully Masukhani
Chicago, IL

Joseph S. Szary

Program Co-Chair
Great American Insurance Company
East Brunswick, NJ

Iga W. Todd

Gordon Rees Scully Mansukhani
Chicago, IL

Kenneth D. Watnick

Anderson, McPharlin & Conners LLP
Los Angeles, CA

Justin Wear

Clark Hill
Dallas, TX

Ryan J. Weeks

Paskert Divers Thompson
Tampa, FL

Joel T. Wiegert

Hinshaw
Minneapolis, MN

AGENDA

FIDELITY PROGRAM

THURSDAY, JANUARY 22, 2026

- 7:00 AM – 8:00 AM **CONTINENTAL BREAKFAST**
- 8:00 AM – 8:15 AM **FSLC CHAIR WELCOME & INTRODUCTORY REMARKS**
- SPEAKER:** **Bruce Corriveau**, *FSLC Committee Chair, Travelers Bond & Specialty Insurance, Cockeysville, MD*
- 8:15 AM – 8:30 AM **PRESENTATION OF THE MARTIN J. ANDREW AWARD**
- 8:30 AM – 8:40 AM **TRANSITION**
- 8:40 AM – 8:45 AM **INTRODUCTION AND WELCOME REMARKS**
- SPEAKERS:** **Adam P. Friedman**, *Program Co-Chair, Chiesa Shahinian & Giantomasi PC, Roseland, NJ*
Angela Sullivan, *Program Co-Chair, Gordon Rees Scully Mansukhani, Chicago, IL*
Joseph S. Szary, *Program Co-Chair, Great American Insurance Company, East Brunswick, NJ*
- 8:45 AM – 9:15 AM **“EMPLOYEE DISHONESTY” VS. “EMPLOYEE THEFT”**
This presentation will address “employee dishonesty” and “employee theft” coverages, how they differ, how these differences affect the handling of claims, and the most recent case law’s interpretation of each.
- SPEAKERS:** **Holly Naehritz**, *Clark Hill, Dallas, TX*
Sarah Riedl Clark, *A/G, Chicago, IL*
- 9:15 AM – 9:45 AM **WHO IS AN “EMPLOYEE” FOR PURPOSES OF COMMERCIAL CRIME COVERAGE?**
This presentation will discuss who is a covered “employee” under commercial crime policies and this definition has evolved to where it is today, as reflected in recent case law. Particular attention will be paid to how changes in the nature of employment in this era of working remotely may have impacted interpretation of the meaning of “employee” for coverage purposes.
- SPEAKER:** **Ryan J. Weeks**, *Paskert Divers Thompson, Tampa, FL*

AGENDA

FIDELITY PROGRAM

continued

9:45 AM – 10:15 AM

CANCELLING/TERMINATING COVERAGE AND RESCINDING COVERAGE

Commercial crime policies traditionally have included clauses providing that coverage cancels or terminates upon discovery of an employee's prior dishonesty. In an effort to increase employment prospects for persons previously convicted of crimes, some jurisdictions now have laws that may affect the application of such clauses. And like all other insurance policies, misrepresentations made in applying for coverage may allow the insurer to rescind a policy. This presentation focuses upon the current state of the law as it applies to the application of cancellation/termination provisions and efforts by insurers to rescind coverage.

SPEAKERS: **Mark S. Gamell**, *Torre, Lentz, Gamell, Gary & Rittmaster*, Jericho, NY
Kim Jackson, *Bovis, Kile, Burch & Medlin, LLC*, Atlanta, GA
Gerald Carozza, *Liberty Mutual Insurance Company*, Seattle, WA

10:15 AM – 10:30 AM

BREAK

10:30 AM – 11:00 AM

THE SCOPE OF COMMERCIAL CRIME'S COVERAGE OF LOSSES RESULTING FROM "COMPUTER FRAUD" AND "FUNDS TRANSFER FRAUD"

As losses that involve the use of a computer continue to proliferate, technology continues to evolve, and fraudsters use the latest technologies to stay ahead of insureds, insureds continue to devise novel ways to describe a loss in an effort to obtain coverage where coverage is not intended, and courts have continued to struggle with the intended scope of "computer fraud" and "funds transfer fraud" coverages. This presentation will focus upon where the law stands as to what constitutes "computer fraud" and "funds transfer fraud", and steps the industry can take to ensure that coverage is not expanded past what the parties intended.

SPEAKER: **Scott L. Schmookler**, *Gordon Rees Scully Mansukhani*, Chicago, IL

11:00 AM – 11:30 AM

"FORGERY OR ALTERATION" COVERAGE IN AN ERA WHERE BUSINESS IS CONDUCTED ELECTRONICALLY

This presentation addresses how the courts' interpretation and application of "forgery or alteration" coverage has changed as business transactions have evolved from being performed on paper to electronically.

SPEAKERS: **Claire M. Diallo**, *Chiesa Shahinian & Giantomasi PC*, Roseland, NJ
Alison E. Kowal, *Old Republic Professional*, Chicago, IL

AGENDA

FIDELITY PROGRAM

continued

11:30 AM – 12:00 PM

COVERAGE LIMITS AND THE CURRENT STATUS OF COVERAGE FOR LOSSES SUSTAINED BY PERSONS AND ENTITIES OTHER THAN THE INSURED

This presentation discusses the current status of the law relevant to two fertile grounds for litigation: insureds' attempts to obtain more than one coverage limit for crimes that occur over several policy periods or that involves multiple people and acts, and claims against commercial crime policies for losses that ultimately were borne by third parties.

SPEAKERS: **Gauri Chopra**, *Berkshire Hathaway Specialty Insurance*, Chicago, IL
Jordan Miller, *Mills Law Group*, Tampa, FL
Joel T. Wiegert, *Hinshaw*, Minneapolis, MN

12:00 PM – 1:40 PM

LUNCH-ON YOUR OWN

1:40 PM – 1:45 PM

WELCOME BACK

1:45 PM – 2:15 PM

THE EVOLUTION OF COMMERCIAL CRIME COVERAGE FOR LOSSES RESULTING FROM “SOCIAL ENGINEERING FRAUD”

Ten years ago, the industry did not consider there to be any question that commercial crime insurance did not cover losses resulting from “social engineering fraud”. Some courts, however, did not agree, causing the industry to respond. This presentation discusses the current state of both policy language and the law with regard to coverage for losses resulting from “social engineering fraud”.

SPEAKER: **Joseph A. Oliva**, *Goldberg Segalla*, New York, NY

2:15 PM – 2:45 PM

WHEN DOES A LOSS RESULT “DIRECTLY FROM” A COVERED RISK IN THE ELECTRONIC AGE?

This presentation focuses upon how courts have considered whether a loss results “directly from” a covered risk as commercial crime has come to be effected largely electronically.

SPEAKERS: **Sarah Gurka**, *Gallagher*, Whippany, NJ
Kenneth D. Watnick, *Anderson, McPharlin & Conners LLP*, Los Angeles, CA

AGENDA

FIDELITY PROGRAM

continued

2:45 PM – 3:15 PM

COVERAGE AND BAD FAITH LITIGATION

Insurers often view bad faith claims raised in coverage litigation as secondary to the primary coverage dispute rather than a source of exposure, but these claims cannot be taken lightly. This presentation will discuss what drives the assertion of bad faith claims, whether such claims are avoidable, strategic options for addressing such claims, how such claims can be resolved, the impact of claim regulations and unfair claim statutes on such claims, and trends in bad faith litigation.

SPEAKER: **Iga W. Todd**, *Gordon Rees Scully Mansukhani*, Chicago, IL

3:15 PM – 3:30 PM

BREAK AND TRANSITION TO PLENARY SESSION

3:30 PM – 5:00 PM

PLENARY SESSION: CYBER RISKS ON CONSTRUCTION MEGA PROJECTS IN THE EMERGING WORLD OF ARTIFICIAL INTELLIGENCE

Cyber risks and AI on construction projects have the potential to cost project participants an enormous amount of time and money. Understanding and protecting against those risks is critical in the modern age of construction. This experienced panel will discuss the risks and emerging trends of cybercrime and AI, the potential utility of AI, and means of protecting surety, fidelity and underwriting professionals from the risks inherent in these emerging technologies.

SPEAKERS: **Brian Gunther, Partner**, *Rivkin Radler LLP*, New York, NY
Michael Prisco, Partner, *Rivkin Radler LLP*, New York, NY
Shavonne Bogan, Senior Cyber Claims Advocate,
Gallagher, Houston, TX
Kevin Mekler, Partner, *Cipriani & Werner, PC*,
Philadelphia, PA
Peter Simonsen, Area Assistant Vice President,
Director–Cyber Liability, *Gallagher*, Chicago, IL
Lauren Winchester, Head of Cyber Risk Services,
Travelers Bond & Specialty Insurance, Blue Bell, PA

FRIDAY, JANUARY 23, 2026

8:30 AM – 8:35 AM

WELCOME BACK REMARKS

SPEAKERS: **Adam P. Friedman**, *Program Co-Chair*, *Chiesa Shahinian & Giantomasi PC*, Roseland, NJ
Angela Sullivan, *Program Co-Chair*, *Gordon Rees Scully Mansukhani*, Chicago, IL
Joseph S. Szary, *Program Co-Chair*, *Great American Insurance Company*, East Brunswick, NJ

AGENDA

FIDELITY PROGRAM

continued

8:35 AM – 9:05 AM

CONDITIONS OF COVERAGE

This presentation addresses the threshold prerequisites for coverage under current commercial crime policy forms and examines how these conditions affect the handling of the claims.

SPEAKERS: **Judith Edwards**, *Coaction Specialty Insurance Group*, Morristown, NJ
Justin Wear, *Clark Hill*, Dallas, TX

9:05 AM – 9:35 AM

THE APPLICATION OF COVERAGE EXCLUSIONS

Exclusions can be a powerful tool that permit the parties to refine the scope of coverage. They also can serve as a barometer of current issues in commercial crime coverage since additions and revisions may be rolled out in response to recent judicial rulings or to reflect ongoing dialogue between underwriters and brokers about risk allocation and shifting marketplace demands. This presentation discusses the exclusions that arise most commonly in today's commercial crime coverage claims and how exclusions have evolved as commerce has transitioned to being conducted electronically.

SPEAKERS: **Matt J. Farley**, *Krebs Farley*, New Orleans, LA
Jonathan S. Ord, *Krebs Farley*, New Orleans, LA
Laura Nigro, *ABA Insurance Services*, Shaker Heights, OH

9:35 AM – 10:05 AM

ETHICAL CONSIDERATIONS IN CLAIMS MANAGEMENT

An insurer's claim management objectives include fact investigation, assessment of coverage, claim resolution, and preservation of recovery rights, all while remaining mindful of possible litigation. The presentation discusses practical and ethical issues that can arise in the handling of commercial crime claims and how claims professionals and counsel can ensure that such issues are addressed appropriately.

SPEAKER: **Jasleen Grewal**, *Dinsmore & Shohl*, Chicago, IL

10:05 AM – 10:20 AM

BREAK AND TRANSITION TO PLENARY SESSION

AGENDA

FIDELITY PROGRAM

continued

10:20 AM – 11:10 AM

PLENARY SESSION: COURT IS IN SESSION- JUDICIAL TIPS FROM THE BENCH

This esteemed panel of judges will provide invaluable insights regarding the keys to effective advocacy to the court and juries. Drawing on their substantial experience and unique perspectives, this panel will provide guidance on effective trial strategies, best practices in the courtroom, and other trial advocacy topics. The judges will also discuss their approaches to judicial decision-making, their views on emerging legal trends, risk evaluation when faced with a trial, and their advice to young lawyers. Additionally, the panel will provide their suggestions on how best to approach unique fidelity and surety topics that may be foreign to judges and juries.

SPEAKERS: **Christopher Ward, Moderator**, *Clark Hill, P.L.C.*, Dallas, TX
Hon. Michel Simon, *United States District Court Judge*, D. Oregon
Hon. Jeri K. Somers (ret.), *Chief Judge, United States Board of Civilian Contract Appeals*
Hon. Judith Wheat, *Judge, 17th Judicial Circuit, Arlington/Falls Church, Virginia*
Hon. Melody Wilkinson, *Judge, 17th Judicial District, Ft. Worth, Texas*

11:10 AM – 11:50 AM

VISION 100: HONORING OUR LEGACY, INSPIRING OUR FUTURE-A CONVERSATION WITH FSLC CHAIRS, PAST, PRESENT AND FUTURE

For over ninety years, the Fidelity and Surety Law Committee of the ABA has been guided by exceptional Chairs and has helped shape the evolution of fidelity and surety law. Through landmark publications, influential advocacy, educational programs, and a national network of experts, FSLC has advanced the practice and raised the standards of our profession. As we approach FSLC's centennial in 2033, *Vision 100* invites you to join a rare and compelling conversation with the leaders who shaped FSLC's past, guide its present, and will carry its future. Moderated by current Chair Bruce Corriveau, this distinguished panel of past and upcoming Chairs will share insights from decades of legal evolution, professional challenges, and industry transformation. They will reflect on pivotal moments in FSLC's history and discuss how the Committee is preparing the next generation of leaders.

MODERATOR: **Bruce Corriveau**, *Travelers Bond & Specialty Insurance*, Cockeysville, MD

11:50 AM – 12:00 PM

CLOSING REMARKS

GENERAL INFORMATION

Registration Deadline: January 12, 2025

Hotel Deadline: December 30, 2025

ADVANCE REGISTRATION

Visit the TIPS website to register at www.americanbar.org/tips or complete the registration form included in this brochure for the "2026 Fidelity & Surety Law Committee Annual CLE Mid-Winter Meeting" to be held at The JW Marriott Washington, Washington, DC.

The registration fee includes admission to the program, course materials, breakfast, breaks, and Welcome Reception. If you wish to have your name appear on the pre-registration list distributed at the program, ALL registration forms must be received no later than the registration deadline of January 12, 2026. Registration reservations will be confirmed in writing within 10 business days.

ON-SITE REGISTRATION

On-site registrations will be accepted if space is available. Call Yasmin Koen at 312-988-5653 or email yasmin.koen@americanbar.org. 72 hours prior to the program to confirm that space is available. On-site registrants will be directed to our online registration system and must pay the program fee by credit card. A \$25 fee will be charged to individuals registering on-site.

CANCELLATION POLICY

No registration fee refunds will be granted for cancellations received after January 12, 2026. To receive a refund (less a \$100 administrative fee), the ABA must receive written cancellation notice by January 12, 2026. Registrants who are unable to attend may send a substitute or will receive course materials in lieu of a refund.

HOTEL INFORMATION

The JW Marriott Washington, DC

For Reservations call: (202) 393-2000 or (800) 393-2503

A limited number of rooms have been blocked for program registrants of the 2026 Fidelity & Surety Law Committee Annual CLE Mid-Winter Conference at The JW Marriott Washington, DC, at 1331 Pennsylvania Avenue, NW, Washington, DC, 20004. Hotel reservations can be made using this link: To be added shortly. The JW Marriott Washington, DC has a hotel room rate of \$299.00 single/double plus 14.95% tax. For reservations, please call the hotel directly at: (202) 393-2000 or (800) 393-2503. The room block will be held until exhausted or until 5:00 PM CST on December 30, 2025. After the meeting specified hotel deadline, reservations will be confirmed based on availability. ***Please refer to the 2026 Fidelity & Surety Law Committee Annual CLE Mid-Winter Conference*** when calling the hotel to make reservations. Hotel check-in is no later than 4:00 p.m. and checkout is 11:00 a.m. All reservations must be guaranteed by credit card or deposit check for one night's room and tax. Individuals with

guaranteed reservations must cancel their reservations 72 hours prior to the scheduled day of arrival to avoid a one-night cancellation charge.

HEALTH & SAFETY:

The ABA takes the health and safety of our members, guests, and staff seriously. We know that the decision whether to attend a meeting is based upon a variety of personal and business considerations. We will continue to monitor a variety of sources, including the U.S. Centers for Disease Control and Prevention (CDC) and U.S. state and local health authorities for the latest public health updates, as well as applicable restrictions on events and gatherings. The ABA plans to hold this meeting in person but reserves the right to cancel or reschedule this event or convert it to a virtual event if health and safety restrictions require it. We will update the registrants, and the website should the plans for this event change.

As part of the registration process to hold this ABA meeting in person, every attendee is required to affirm their commitment to comply with the in-person meeting guidelines. Please review the requirements carefully prior to registering for the meeting.

AIRLINE INFORMATION

ABA NEGOTIATED AIRFARE DISCOUNTS—AVAILABLE ONLINE TO ABA MEMBERS!

*A Travel Profile is required when booking airline reservations with ABA Egencia

CLE CREDIT

The ABA will seek 20.41 hours of CLE credit in 60-minute states, and 24.5 hours of CLE credit for this program in 50-minute states. Credit hours are estimated and are subject to each state's approval and credit rounding rules. Please visit the program website at www.ambar.org/tips for program CLE details or visit americanbar.org/mcle for general information on CLE at the ABA.

CE CREDIT

CE Credits have been applied for through SDC CPAs LLC and may be available in the respective states so don't miss this exciting educational opportunity. SDC CPAs LLC will be on-site to handle all applications and inquiries. Please contact 630/820-5770 before January 1, 2026 for more information.

MEMBERSHIP INFORMATION

For more information about membership in the ABA or the Tort Trial & Insurance Practice Section (TIPS), please visit us online at https://www.americanbar.org/groups/tort_trial_insurance_practice/membership/ or call 800/285-2221. Membership in TIPS includes three industry-leading periodicals, discounts of up

GENERAL INFORMATION

(Continued)

to 20% on many TIPS CLE programs, and other career and practice-enhancing benefits. Join TIPS today!

PERSONS WITH DISABILITIES

Services for persons with disabilities are available. If special arrangements are required for an individual to attend this program, please notify Theresa Beckom at either 312/988-5672 or at Theresa.beckom@americanbar.org. Reasonable notice is requested.

GET CONNECTED WITH TIPS

Information on this and other TIPS CLE programs is available online at ambar.org/tips. Visit us and get connected!

SCHOLARSHIPS AVAILABLE

Scholarships are available for all Section activities, courtesy of the TIPS Scholarship Fund. The Fund, established with the

International Risk Management Institute ("IRMI") and supported by subscriptions to the IRMI CGL Reporter, is intended to increase membership involvement in TIPS' activities by minorities, solo and small firm practitioners, government attorneys, women, and young lawyers by providing financial support to those who would otherwise be unable to participate. To request an application or receive additional information, visit https://www.americanbar.org/groups/tort_trial_insurance_practice/membership/ or contact Jeane DuBose at Jeane.DuBose@americanbar.org for more information and an application.

EXHIBITORS

For Companies or Vendors interested in exhibiting at this program please contact Jeane DuBose at Jeane.DuBose@americanbar.org or 312-988-5673.



REGISTRATION FORM

2026 FIDELITY & SURETY LAW COMMITTEE ANNUAL CLE MID-WINTER MEETING

The JW Marriott • Washington, DC • January 21-23, 2026

HOTEL DEADLINE: DECEMBER 30, 2025

REGISTRATION DEADLINE: JANUARY 12, 2026

1. REGISTRANT: *(Please print or type one form per person; photocopy this form for additional registrants)*

LAST NAME FIRST NAME MI

NAME AS YOU WISH IT TO APPEAR ON YOUR BADGE

FIRM/COMPANY WHAT STATE(S) ARE YOU LICENSED IN?

ADDRESS

CITY STATE ZIP

(AREA CODE) BUSINESS TELEPHONE FACSIMILE

E-MAIL ADDRESS

Are you attending your first TIPS Program? ☐ Yes ☐ No

☐ I am a member of the ABA and wish to join the Tort Trial & Insurance Practice Section and I have enclosed a separate check for \$75 made payable to the American Bar Association.

THREE WAYS TO REGISTER

1. ONLINE:
www.americanbar.org/groups/tips

2. MAIL:
American Bar Association
Tort Trial & Insurance Practice Section
2026 FIDELITY & SURETY LAW COMMITTEE
ANNUAL CLE MID-WINTER MEETING
Attn: Service Center/
Meeting Event Code: IL2601FSLC
321 North Clark Street, Floor 19
Chicago, IL 60654

3. SECURE FAX:
(312) 988-5850
On-site registrants must pay the program fee plus an additional \$25 by check or credit card.

2. REGISTRATION FEES:

	On or Before	After		
	1/12/26	1/12/26	QTY	Total
Non-Member (List Price)	\$1,050	\$1,150	_____	_____
ABA Member	\$950	\$1,000	_____	_____
TIPS Section Member	\$905	\$930	_____	_____
Government Employee	\$550	\$550	_____	_____
Insurance Company Employee (ABA Member, Non-Member)	\$375	\$400	_____	_____
Insurance Company Employee (TIPS Member)	\$350	\$375	_____	_____

3. TOTAL PAYMENT

TOTAL _____

4. PAYMENT INFORMATION

- ☐ Check (made payable to the ABA)
- ☐ American Express
- ☐ MasterCard
- ☐ VISA
- ☐ Discover

CREDIT CARD NUMBER

EXPIRATION DATE/CVV

SIGNATURE



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