

# SMITH GROUP / MUNICH AMERICAN MAINE EVENT 2011

## OVERVIEW

### HOSTED BY SMITH GROUP AND MUNICH AMERICAN REASSURANCE CO.

The Maine Event is an annual conference hosted by Smith Group ([www.smithgroupre.com](http://www.smithgroupre.com)) and Munich American Reassurance Company ([www.marclife.com](http://www.marclife.com)), market leaders in Group LTD Reinsurance.

### AN EVENT EXCLUSIVELY FOR LTD AND LIFE REINSURANCE CLIENTS

Smith Group / Munich American reinsurance clients have exclusive access to the event and pay **no conference fee** to attend. Smith Group and Munich American cover costs for meeting sessions, overnight accommodations, meals, activities and airport ground transportation.

*(attendees are responsible for transportation, incidentals, and a nominal fee for spouses/guests if applicable).*

### SESSIONS ON BOTH MACRO LEVEL TRENDS AND SPECIFIC GROUP DISABILITY AND LIFE PRACTICE AREAS

The Maine Event features expert presentations on current trends affecting the employee benefits insurance industry as well as sessions focused on specific LTD and Group Life practice areas.

### SPACE IS LIMITED—REGISTER EARLY!

Although space is limited, our goal is to accommodate all clients wishing to attend. Register early to secure your spot.

#### CLIENT PRAISE FOR THE MAINE EVENT CONFERENCE...

*"My thanks to all of you. It was a wonderful event."*

*"I have thoroughly enjoyed this event on the 2 occasions I have attended it.*

*One big selling point for me is the balance of work related events and social events."*

*"Thank you for all the effort you put into this – it was appreciated and noticed!!"*

*"I think it was a great event!...well organized and very informative."*

## AGENDA - AT - A - GLANCE

### Trends in Group Disability and Life Insurance

Sessions to Include:

- WORKFORCE WELLNESS TRENDS
- EMPLOYEE BENEFITS TRENDS
- REGULATORY/COMPLIANCE TRENDS
- BREAK OUT TALK SHOP SESSIONS
- ECONOMIC TRENDS
- GROUP LIFE AND ANCILLARY PRODUCTS SESSION

## DATE

Monday, 9/12/11 to Wednesday, 9/14/11

## LOCATION

Portland Regency Hotel, Portland, Maine



**Reservations:** Smith Group will coordinate all reservations at the Portland Regency Hotel. Submit a Maine Event Registration to automatically secure a reservation at the Portland Regency (*see REGISTRATION*).

**Accommodations:** [www.theregency.com](http://www.theregency.com) / 207.774.4200 / 800.727.3436  
Internet Access - Complimentary high-speed wireless access available  
Business Services - Print, Fax and Copy services available through front desk  
Full Spa and Fitness Center, complimentary coffee & newspapers (attendees receive 10% spa discount)

**Directions:** [www.theregency.com/map.htm](http://www.theregency.com/map.htm)

**Extended Stay:** The Regency Hotel will extend the group rate 3 days pre- and post-conference (\$199 plus 7% ME tax). If you wish to extend your stay, contact Dana Schauf ([dana@redbirdevents.com](mailto:dana@redbirdevents.com)) or Kristen deCastro ([kdecastro@smithgroupre.com](mailto:kdecastro@smithgroupre.com)).

# SMITH GROUP / MUNICH AMERICAN MAINE EVENT 2011

## AGENDA

### TRENDS IN GROUP DISABILITY AND LIFE INSURANCE

#### Monday, September 12, 2011

- 12:00-4:00 pm Check-In
- 4:45-5:45 pm Welcome Reception
- 5:45-7:00 pm WELCOME ADDRESS & OPENING NIGHT PRESENTATION  
*Smith Group and Munich American Re Welcome You to Maine Event 2011*  
*Entertainment provided by Tuck Tucker and John Ater, Standup Comedians*
- 7:00-9:00 pm Dinner  
The Regency Atlantic Room
- 9:00 pm After Dinner Social, Armory Lounge, Regency Hotel  
*Hosted by Smith Group and Munich American Re*



#### Tuesday, September 13, 2011

- 6:00 am Group Fun Run (approx. 3-4 mi.)
- 7:00-8:00 am Breakfast
- 8:00-9:15 am WORKFORCE WELLNESS TRENDS  
*Trends in Consumer Health Attitudes and Behaviors*  
*Healthcare costs continue to rise at an unsustainable pace. As reform expands health insurance coverage to an estimated 25 Million currently uninsured individuals, insurers are seeking greater insight into healthcare attitudes and behaviors to more effectively assess risks and opportunities. Tony Glebe, Vice President of Analytic Consulting and Research Services at Thomson Reuters, will share research and insights, and will highlight potential opportunities for insurers to better assess and manage risk across product lines.*  
Tony Glebe, Vice President, Practice Leadership, Thomson Reuters  
[http://thomsonreuters.com/products\\_services/healthcare](http://thomsonreuters.com/products_services/healthcare)
- 9:30-10:45 am EMPLOYEE BENEFITS TRENDS  
*Enrollment Trends in SSDI Insurance and Proposals for Modernization*  
David H. Autor, Ph.D., Professor and Associate Chair, MIT Department of Economics  
<http://econ-www.mit.edu/faculty/dautor>  
*Supporting Work: A Proposal for Modernizing the U.S. Disability Insurance System*
- 11:00-12:00 pm REGULATORY/COMPLIANCE TRENDS  
Karen Z. Schutter, Executive Director, Interstate Insurance Product Regulation Commission  
[http://www.insurancecompact.org/documents/contacts\\_bios\\_schutter.pdf](http://www.insurancecompact.org/documents/contacts_bios_schutter.pdf)



SMITH GROUP / MUNICH AMERICAN  
MAINE EVENT 2011

## AGENDA (continued)

### Tuesday, September 13, 2011 (continued)

- 12:00-1:00 pm Lunch
- 12:30-6:00 pm **Activities**  
*transportation provided*
- 12:30-6:00 pm Golf at The Woodlands Club
- 2:45-4:15 pm Trolley Tour
- 1:30-3:30 pm Lighthouse Harbor Cruise
- 1:00-4:00 pm Charter Fishing
- 12:30-2:00 pm Lucky Catch Lobstering First Run  
2:00-3:30 pm Lucky Catch Lobstering Second Run
- 1:30 & 4:30 pm Freeport Outlet Shopping Shuttle  
*(departure and return times respectively)*
- on your own Old Port Sightseeing
- 6:00-7:00 pm Reception at The Woodlands Club, Falmouth (transportation provided)
- 7:00-9:00 pm Lobster Bake at The Woodlands Club, Falmouth (transportation provided)



### Wednesday, September 14, 2011

- 7:15-8:15 am Breakfast
- 8:15-9:30 am BREAK OUT TALK SHOP SESSIONS  
*Actuarial, Underwriting, Claims, Regulatory/Compliance*  
*An opportunity for attendees to discuss discipline-specific group LTD and Life insurance trends.*  
*Topics to be solicited in advance.*
- 9:45-10:45 am ECONOMIC TRENDS  
Nicholas S. Perna, Ph.D., Managing Director & Chief Economist, Perna Associates, LLC  
Visiting Lecturer at Yale University (Department of Economics)  
[www.smithgroupre.com/PDFDOCS/nickPerna.pdf](http://www.smithgroupre.com/PDFDOCS/nickPerna.pdf)
- 11:00-12:00 pm GROUP LIFE AND ANCILLARY PRODUCTS SESSION
- 12:00-12:30 pm Check-Out
- 12:00-1:00 pm Lunch
- 1:00 pm Departure

# SMITH GROUP / MUNICH AMERICAN MAINE EVENT 2011

## ACTIVITIES

The Maine Event features an afternoon of recreational activities on Tuesday, September 13. Transportation is provided. Complete the attached Registration Form to choose an activity.

### **Golf**

12:30-6:00 pm

Golf at The Woodlands Club in Falmouth.

First tee time is at 1:00.

Locker rooms available; plan accordingly for extended dinner stay.

Please bring your own clubs as rentals are limited.

<http://www.thewoodlands.org>



### **Trolley Tour**

2:45-4:15 pm

Get on board the "Discovery" trolley and enjoy a 90 minute fully narrated tour of Portland's diverse history and architecture. This tour also stops for photos at Portland Head Light, Maine's 1st lighthouse.

<http://www.portlanddiscovery.com/tours/portland-trolley-tour/>



### **Lighthouse Harbor Cruise**

1:30-3:30 pm

Enjoy this narrated scenic cruise through the busy harbor and innermost islands to see lighthouses, forts, lobster boats, seals, and seabirds. As many as seven lighthouses can be seen during the cruise, including Maine's oldest and most photographed lighthouse, Portland Head Light.

<http://www.portlanddiscovery.com/tours/lighthouse-lovers-cruise/>

### **Charter Fishing**

1:00-4:00 pm

Try your luck at striped bass fishing with Go Fish Charters. Note, this trip is limited to 12 people (6 on each boat).

<http://www.gofishmaine.com>



### **Lucky Catch Lobstering**

12:30-2:00 pm & 2:00-3:30 pm (two runs)

Captain Tom will guide you through the daily routines of a Maine lobsterman, while enjoying close-up views of historic lighthouses. See how that tasty treat gets from the bottom of the ocean to your dinner plate. Hear about lobster habits and conservation efforts while learning about hardshells, shedders, shorts, culls, and keepers.

<http://www.luckycatch.com>



### **Freeport Outlet Shopping Shuttle**

1:30 pm departure & 4:30 pm return

VIP Charters to provide shuttle service to Freeport from The Regency Hotel. Enjoy outlet shopping and visit the L.L. Bean Flagship store.

<http://www.freeportusa.com> / <http://www.llbean.com>

### **Old Port Sightseeing**

Explore Portland's Historic Old Port. Enjoy local shops and eateries.



# SMITH GROUP / MUNICH AMERICAN MAINE EVENT 2011

## REGISTRATION

Complete a Registration Form, designating yourself or another representative from your company. Although space is limited, our goal is to accommodate all clients wishing to attend.

**To Register:**

**contact Kristen deCastro at [kdecastro@smithgroupe.com](mailto:kdecastro@smithgroupe.com)**

**OR**

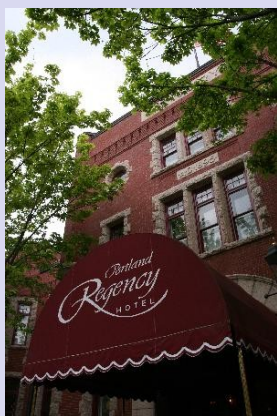
**go to [www.smithgroupe.com/MAINEEVENT/maineeventregistration.aspx](http://www.smithgroupe.com/MAINEEVENT/maineeventregistration.aspx)**

**OR**

**complete the attached Registration Form and fax to 207.879.5699**

## TRANSPORTATION

Smith Group partners with Mermaid Transportation to provide roundtrip ground transportation from the Portland International Jetport (PWM). Please complete the Registration Form to secure airport ground transportation, or contact Dana Schauf at [dana@redbirdevents.com](mailto:dana@redbirdevents.com). Smith Group also coordinates transportation for all scheduled activities.



## DINING

All meals and receptions are provided as part of the Maine Event service. View a sample menu at [www.smithgroupe.com/pdfdocs/MaineEventMenu2011.pdf](http://www.smithgroupe.com/pdfdocs/MaineEventMenu2011.pdf). Indicate special dietary needs in the "Special Requests" section of the Registration Form, or send to Dana Schauf at [dana@redbirdevents.com](mailto:dana@redbirdevents.com).

## ATTIRE

The dress code for meeting sessions, receptions, meals and activities is resort casual. A jacket or sweater is recommended for outdoor activities. Collared shirts are required for golf.

## QUESTIONS?

Kristen deCastro at [kdecastro@smithgroupe.com](mailto:kdecastro@smithgroupe.com)  
207.879.5680 (v) / 207.879.5699 (f)  
or  
Dana Schauf at [dana@redbirdevents.com](mailto:dana@redbirdevents.com)

# MAINE EVENT 2011 REGISTRATION

Use this form to register for Smith Group's Maine Event conference. Although space is limited, our goal is to accommodate all clients wishing to attend.

*Upon submission of this registration form Smith Group will hold your reservation at The Regency Hotel for the nights of 9/12/11 & 9/13/11. If you wish to extend your stay, The Regency Hotel will offer the group rate 3 days pre- and post- conference (\$199/night plus 7% ME Tax). To make extended stay reservations, contact Dana Schauf at [dana@redbirdevents.com](mailto:dana@redbirdevents.com).*

Registration Deadline August 8, 2011

by mail:	Kristen deCastro	by phone:	207.879.5680
	Smith Group	by fax:	207.879.5699
	707 Sable Oaks Drive	by email:	<a href="mailto:kdecastro@smithgroupre.com">kdecastro@smithgroupre.com</a>
	South Portland, ME 04106		

## ATTENDEE INFORMATION

Company Name: \_\_\_\_\_

First & Last Name: \_\_\_\_\_

Name to appear on Badge: \_\_\_\_\_

Title: \_\_\_\_\_

Street Address 1: \_\_\_\_\_

Street Address 2: \_\_\_\_\_

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

State: \_\_\_\_\_

Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

**Registration Confirmation** will be sent to the email listed above. If you would like the confirmation sent to an additional email, please list it here:

\_\_\_\_\_

## SPOUSE / GUEST

My Spouse/Guest will join me at the Maine Event

Spouse/Guest Full Name: \_\_\_\_\_

*Note: Attendee will be charged a flat fee of \$275 for a spouse/guest. This fee is payable at check-in and covers charges for double occupancy room fees (9/12/11 & 9/13/11), receptions, all meals, and an activity for the spouse / guest.*

# MAINE EVENT 2011 REGISTRATION

## SPECIAL REQUESTS

Please indicate special requests (i.e. extended-stay reservations, first floor room access, special dietary needs...)

---



---

## ACTIVITIES

Please choose one activity for yourself and one activity for your guest if applicable. All activities are scheduled for Tuesday afternoon, September 13.

### **Golf**

Attendee       Spouse/Guest

9/13/11, 12:30-6:00 pm

Golf at The Woodlands Club in Falmouth. First tee time is at 1:00. Locker rooms available— plan accordingly for extended dinner stay. Please bring your own clubs if possible.  
<http://www.thewoodlands.org>

### **Trolley Tour**

Attendee       Spouse/Guest

9/13/11, 2:45-4:15 pm.

Enjoy a 90 minute fully narrated tour of Portland's diverse history and architecture. This tour also stops for photos at Portland Head Light.  
<http://www.portlanddiscovery.com/tours/portland-trolley-tour>

### **Lighthouse Harbor Cruise**

Attendee       Spouse/Guest

9/13/11, 1:30-3:30 pm

Enjoy this narrated scenic cruise through the harbor and innermost islands. As many as seven lighthouses can be seen during the cruise, including Portland Head Light.  
<http://www.portlanddiscovery.com/tours/lighthouse-lovers-cruise>

### **Charter Fishing**

Attendee       Spouse/Guest

9/13/11, 1:00-4:00 pm.

Try your luck at striped bass fishing. Note, this trip is limited to 12 people (6 on each boat).  
<http://www.gofishmaine.com>

### **Lucky Catch Lobstering**

Attendee       Spouse/Guest

9/13/11, 12:30-2:00 pm or 2:00-3:30 (two runs—circle time preference)

Learn about the daily routines of a Maine lobsterman, while enjoying close-up views of historic lighthouses.  
<http://www.luckycatch.com>

### **Freeport Outlet Shopping Shuttle**

Attendee       Spouse/Guest

9/13/11, 1:30 pm departure & 4:30 pm return

VIP Charters to provide shuttle service to Freeport from The Regency Hotel. Enjoy shopping and visit the L.L. Bean Flagship Store.  
<http://www.freeportusa.com> / <http://www.llbean.com>

I do NOT wish to participate in an activity

Attendee       Spouse/Guest

I wish to choose an activity at a later date

Attendee       Spouse/Guest

## AIRPORT GROUND TRANSPORTATION

Yes, I need ground transportation from Portland International Jetport (PWM).

Airline: \_\_\_\_\_

Arrival Flight Date: \_\_\_\_\_

Arrival Flight Time: \_\_\_\_\_

Arrival Flight Number: \_\_\_\_\_

Departure Flight Date: \_\_\_\_\_

Departure Flight Time: \_\_\_\_\_

Departure Flight Number: \_\_\_\_\_

I do NOT need ground transportation from Portland International Jetport.

I am not sure at this time if I need airport ground transportation. I will notify at a later date.