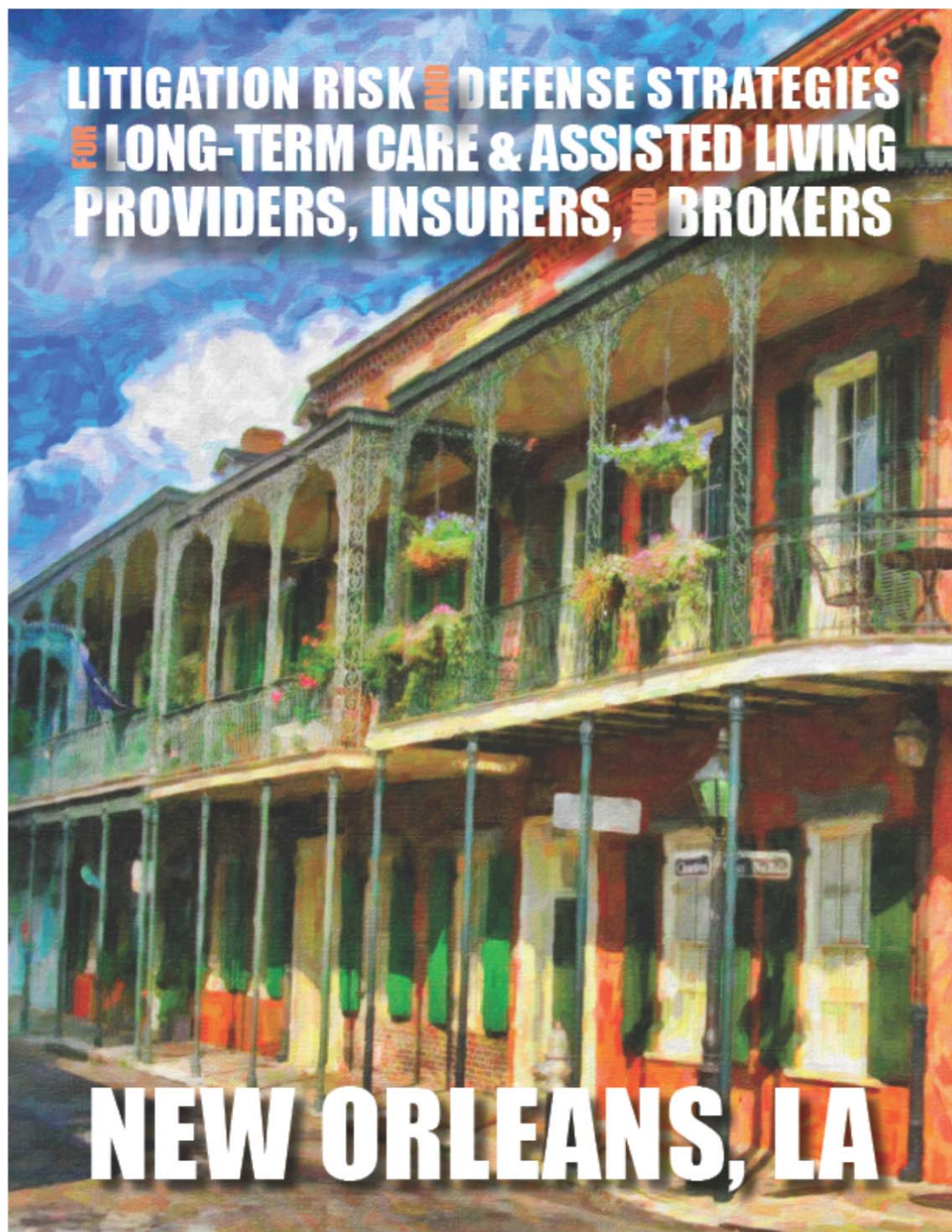


2017



MARCH 29 – MARCH 30, 2017
THE ROYAL SONESTA ON BOURBON ST.

HOSTED BY:

COWAN & LEMMON, L.L.P.

HAGWOOD ADELMAN TIPTON, PC

HORNE ROTA MOOS LLP

KAUFMAN BORGEEST & RYAN LLP

Welcome to the fifth annual Litigation Risk and Defense Strategies for Long Term Care & Assisted Living Providers, Insurers, and Brokers Conference

AALNA PARTNERSHIP

The 2017 conference, which will be held in New Orleans, LA March 29 – March 30, is pleased to announce partnership with the American Assisted Living Nursing Association (AALNA). AALNA is a professional nursing association representing assisted living registered nurses, licensed practical nurses, and licensed vocational nurses promoting safe, effective, and dignified nursing practice in assisted living. To learn more about AALNA, please visit their [website](#)



FEATURED TOPICS

- Industry Trends Update
- Risk Management Issues
- Alzheimer/Dementia Issues
- Regulatory Issues
- Claims Issues
- Medical Issues
- Insurance Issues

WHO SHOULD ATTEND

- Administrators
- Clinical Professionals
- Facility Owners
- Facility Operators
- Risk Managers
- Insurance Underwriters
- Brokers and Claims Professionals
- In-House or General Counsel

THANK YOU TO OUR SPONSORS



WEDNESDAY, MARCH 29

- 10:00 a.m. – 1:30 p.m..** *Conference Check-In*
Royal Sonesta Hotel, Fleur De Lis Ballroom
- 1:30 p.m. – 3:30 p.m.** *You Be the Jury: Long Term Care Mock Trial Activity*
Steven D. Weiner, Partner, Kaufman Borgeest & Ryan LLP
- 3:30 p.m.. – 4:30 p.m..** *Insurance Challenges in the Long-Term Care Environment: Where We Have Been, Where We Are Now, and Where We Are Going*
Moderator: **Steven D. Weiner**, Partner, Kaufman Borgeest & Ryan LLP
Panel: **Richard (Ric) Henry**, President, Pendulum
Dennis Cook, Long Term Care Project Line Manager, IronHealth
Lee McClure, Professional Liability Broker, CRC Insurance Services, Inc.
Jason Lewis, President – Denver, CRC Group
- 6:00 p.m.. – 8:00p.m.** *Welcome Reception and Networking Session: Enjoy Cocktails and Hors D'oeuvres in an Authentic Private French Quarter Residence*

THURSDAY, MARCH 30

- 8:30 a.m. – 9:00 a.m.** *Conference Check-In and Continental Breakfast*
Royal Sonesta Hotel, Fleur De Lis Ballroom
- 9:00 a.m. – 9:15 a.m.** *Welcome and Opening Remarks*
J. Roslyn Lemmon, Partner, Cowan & Lemmon, LLP
- 9:15 a.m. – 9:45 a.m.** *Keynote: Anecdotes and Suggestion for Crisis Management in the Long Term Care Environment*
John J. Deveney, III, ABC, APR, Fellow PRSA, IABC Fellow, President, Deveney Communications
- 9:45 a.m. – 10:30 a.m.** *The CMS Final Rule, Arbitration and the Regulatory Mash-Up*
Rebecca Adelman, PLLC, Shareholder, Hagwood Adelman Tipton, PC
- 10:30 a.m. – 11:15 a.m.** *To Err is Human: The Impact of Adverse Events on the Second Victims*
Chastiti N. Horne, Partner, Horne Rota Moos, LLP
- 11:15 a.m. – 12:00 p.m..** *Discussion of Employment Issues in the LTC/ALF Environment*
Moderator: **Chastiti N. Horne**, Partner, Horne Rota Moos, LLP
Kristina Hulseley, Associate General Counsel, Ensign Services, Inc.
- 12:00 p.m.. – 1:00 p.m..** *Networking Lunch*
Royal Sonesta Hotel, Fleur De Lis Ballroom
- 1:00 p.m.. – 1:45 p.m..** *Defense Strategy: The Progression of Alzheimer's Dementia Is a Predictor of Bad Outcomes In Spite of Optimum Care*
Carl Hagwood, Shareholder, Hagwood Adelman Tipton, PC
Michael E. Phillips, Shareholder, Hagwood Adelman Tipton, PC
Alicia Luke, RNC, LNCC, President & CEO, ALN Consulting
- 1:45 p.m.. – 2:30 p.m..** *Panel Discussion on Bad Outcomes in Dementia Patients: Does the Ending Always Have to be Unhappy?*
Moderator: **J. Roslyn Lemmon**, Partner, Cowan & Lemmon, LLP
Panel: **Leah Therio**, Associate, Cowan & Lemmon, LLP
Carl Swan, National Senior Living Practice Sales Executive, Propel Insurance
Anthony Stompanato, Regional Vice President, AIG

THURSDAY, MARCH 30 (CONTINUED)

- 2:30 p.m. – 3:00 p.m.** *Long-Term Care For Transgender/LGBT Patients: Unique Issues and Concerns – Compassionate Care in an Evolving Environment*
J. Roslyn Lemmon, Partner, Cowan & Lemmon, LLP
Jonathan D. Rubin, Senior Partner, Kaufman Borgeest & Ryan LLP
- 3:00 p.m. – 3:30 p.m.** *Piercing the Corporate Veil and How Management Agreements Can Backfire*
Mario Giannettino, Attorney, Kaufman Borgeest & Ryan LLP
Joshua C. Anderson, Partner, Horne Rota Moos, LLP
- 3:30 p.m. – 3:45 p.m.** *Refresh and Recharge Afternoon Break*
- 3:45 p.m. – 4:45 p.m.** *Managing Distinctive Personality Types in the Aging Services Environment – Promoting Safe Outcomes*
Jonathan D. Rubin, Senior Partner, Kaufman Borgeest & Ryan LLP
Jose Guzman, Jr., RN, MS, CPHRM, DFASHRM, Hudson Insurance Group
- 4:45 p.m. – 5:00 p.m.** *Closing Remarks*
Horne Rota Moos, LLP

CONFERENCE GOAL

The Litigation Risk and Defense Strategies for Long-Term Care & Assisted Living Providers, Insurers, and Brokers Conference is complimentary to invited professionals in the long-term care industry. Our annual event is designed to elevate the profile of risk management in long-term care through comprehensive education and networking collaboration. The Conference is a two-day program, beginning Wednesday afternoon, March 29th, with educational sessions during the afternoon and networking event in the evening, followed by a full day of educational sessions on Thursday, March 30th.

The robust platform provides industry professionals, including administrators, clinical professionals, facility owners and operators, risk managers, and insurance agents and brokers, with the resources and tools necessary to simultaneously reduce risk and ensure legal and regulatory compliance within their organization. Attendees will gain knowledge of risk exposure and the importance of effective risk management strategies in today's long-term care environment.

EDUCATIONAL OBJECTIVES

Attendees will experience innovative educational programming and in-depth panel discussions from thought leaders in the long-term care industry. Our panel of experienced faculty include defense attorneys, risk management providers, general counsel, healthcare professionals, and insurance service providers. The wide-ranging session topics will cover recent developments, trends, and challenges in the legal and insurance marketplaces; risk management and prevention; defense of standard of care allegations; solutions to complicated Medicare reimbursement issues; survey citations and penalties; and the role of government and law enforcement agencies in the long-term care industry.

ACCREDITATION

The Conference is seeking approval from the National Association of Boards of Examiners of Long Term Care Administrators (NAB/NCERS) to award continuing education credits to Residential Care/Assisted Living and Nursing Home Administrators. We have also applied for credits for Registered Nurses and other healthcare professionals through the American Assisted Living Nurses Association (AALNA). We are seeking credits for the Continuing Professional Development Program for Chartered Property Casualty Underwriters (CPCUs). Attorney MCLE credits are being requested for the following states: Louisiana, Texas, New York and Tennessee. We will also assist attorneys from other states in obtaining credits following the conference.

REGISTRATION & TRAVEL

The Conference, which includes registration and conference breakfast and lunch, is offered to invited attendees at no-charge. Attendees are responsible for travel and hotel accommodations, including reservations and payment.

DISCLAIMER

The Conference reserves the right, in its sole discretion, to refuse to accept or to retain any person as a registrant of the Conference, at any time. The Conference is not open to Plaintiff firms or non-sponsoring defense counsel.



ROYAL SONESTA HOTEL NEW ORLEANS

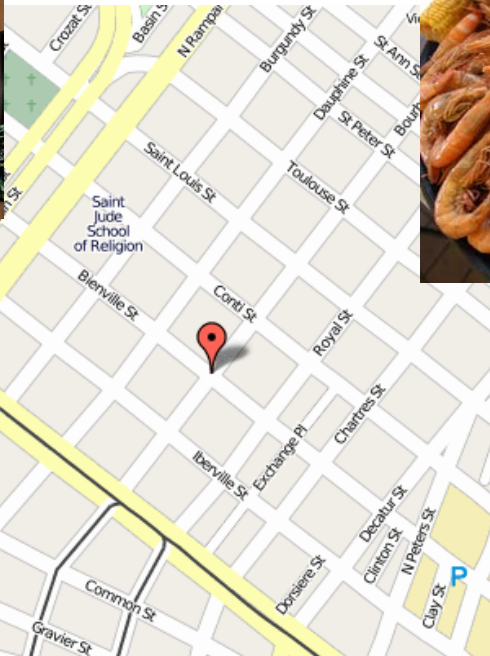
HOST HOTEL

Take in the heart and soul of Louisiana from one of the finest Bourbon Street New Orleans hotels. **Jazzed up and newly reimagined**, the AAA Four Diamond-rated Royal Sonesta New Orleans effortlessly combines timeless elegance and southern refinement, setting itself apart from other French Quarter hotels.

The Royal Sonesta Hotel
300 Bourbon Street
New Orleans, LA 70130
(504) 586-0300 - Reservations

MAKE HOTEL RESERVATIONS

The 2017 Conference is offering a limited number of hotel rooms at a preferential rate of \$199.00 plus taxes, per night. To reserve your room, call **(504) 586-0300**. Please reference "Litigation Risk & Defense Strategies for Long Term Care" to receive the discounted rate. [Link to reservation page](#)



Wednesday, March 29

1:30 p.m. – 3:30 p.m.

You Be The Jury: Long Term Care Mock Trial Activity

STEVEN D. WEINER, Kaufman Borgeest & Ryan LLP

Long term care suits have evolved to encompass multiple disciplines and independent contractors who participate in various aspects of patient care and delivery of services. There is often division of responsibility and contractual issues that present which are unknown to the residents and their families in terms of the actual delivery of care and ancillary services in the long term care setting. In this section, we will present a recent case involving claims asserted against various defendants who participated in the care of a resident. The seminar attendees will then be asked to consider the evidence presented by defense counsel and serve as “jurors,” to determine whether there is liability for any of the defendants and if so, apportion such responsibility, consider the measure of damages/ compensation including whether an award of punitive damages is warranted. The verdict(s) of the attendees will then be contrasted against each other as well as a pool of prospective lay jurors whose views were assessed on a mathematical basis to assess the likely outcome at trial. Discussion will then follow as to lessons which can be learned for all providers from the various issues presented in the case.

Thursday, March 30

9:15 a.m. - 9:45 a.m.

Keynote: Anecdotes and Suggestion for Crisis Management in the Long Term Care Environment

John J. Deveney, III, ABC, APR, Fellow PRSA, IABC Fellow, Deveney Communications

Wednesday, March 29

3:30 p.m. – 4:30 p.m.

Insurance Challenges in the Long-Term Care Environment: Where We Have Been, Where We Are Now, and Where We Are Going

Moderator: Steven D. Weiner, Kaufman Borgeest & Ryan LLP

Panel: Richard (Ric) Henry, Pendulum

Dennis Cook, IronHealth

Lee McClure, CRC Insurance Services, Inc.

Jason Lewis, CRC Group

A moderated panel presentation with insurance and risk management experts in the long term care industry examining the evolution of long term care litigation and insurance industry response. Panelists will be asked to consider the factors that have impacted the insurance markets in long term care, whether it be from the perspective of Underwriters, Brokers or Risk Managers. The panel will also consider the present state of the market and what can be expected in the coming years in the challenging long term care insurance market.

Thursday, March 30

9:45 a.m. - 10:30 a.m.

The CMS Final Rule, Arbitration and the Regulatory Mash-Up

Rebecca Adelman, Hagwood Adelman Tipton, PC

On October 4, 2016, the final regulations for nursing homes participating in the Medicare and/or Medicaid programs were published effective on November 28, 2016 and will be implemented in three phases. This program provides an overview of the Phases and anticipation of action plans for Phase 2. As added an added bonus, the presentation will address the Final Rule and the status of the court-ordered injunction against CMS prohibiting the enforcement of the CMS ban on pre-dispute binding arbitration agreements and nursing home admissions. As a twist, we will discuss the lawsuit Kindred Nursing Ctrs. LP v. Clark and the U.S. Supreme Court arguments February 22, 2017 in a case that may have far-reaching implications and affect the viability of the long-term care industry and implicate the CMS rule. Finally, we'll complete the mash-up discussing other regulatory matters affecting the aging population including home health and hospice, Compare websites, and the new survey process for long term care. The session will be jam-packed with all you need to know about CMS regulations!

Thursday, March 30

10:30 a.m. - 11:15 a.m.

To Err is Human: The Impact of Adverse Events on the Second Victims

Chastiti N. Horne, Horne Rota Moos, LLP

The analysis behind the Second Victim phenomenon and how adverse events can be just as devastating to the clinicians as to the patient. A look at how to support and not abandon the second victim and how we, as healthcare providers, need to support both professionally and personally the practitioner

Thursday, March 30

11:15 a.m. - 12:00 p.m..

Panel Discussion of Employment Issues in the LTC/ALF Environment

Chastiti N. Horne, Horne Rota Moos, LLP

Kristina Hulseley, Ensign Services, Inc.

This presentation highlights the rising occurrence of employment law issues in LTC/ALF facilities. From work place injuries to terminating employees and everything in between. We will explore allegations of discrimination, equality and documenting workplace infractions

Thursday, March 30

1:00 p.m.. – 1:45 p.m..

Defense Strategy: The Progression of Alzheimer's Dementia Is a Predictor of Bad Outcomes In Spite of Optimum

Carl Hagwood, Hagwood Adelman Tipton, PC

Michael E. Phillips, Hagwood Adelman Tipton, PC

Alicia Luke, RNC, LNCC, ALN Consulting

Long Term Care facilities can successfully defend allegations of negligence where there is a documented progression of Alzheimer's Dementia including allegations of negligence resulting from falls, dehydration, malnutrition, infections/UTIs and pressure ulcers.

Thursday, March 30

1:45 p.m.. - 2:30 p.m..

Panel Discussion on Bad Outcomes in Dementia Patients: Does the Ending Always Have to be Unhappy?

J. Roslyn Lemmon, Cowan & Lemmon, LLP

Leah Therio, Cowan & Lemmon, LLP

Carl Swan, Propel Insurance

Anthony Stompanato, AIG

A moderated panel presentation with legal, insurance and risk management experts in the long term care industry examining ways in which medical knowledge about predictable outcomes in dementia patients impacts litigation. Panelists will present real life scenarios to show the strategic quagmire faced by the long term care industry in which the end result is bad despite proper care. The panel will discuss strategies for utilizing medical knowledge in the defense of litigation as well as from a preventative standpoint in educating families and managing expectations.

Thursday, March 30

2:30 p.m. – 3:00 p.m.

*Long-Term Care For Transgender/LGBT Patients:
Unique Issues and Concerns – Compassionate Care
in an Evolving Environment*

J. Roslyn Lemmon, Cowan & Lemmon, LLP

Jonathan D. Rubin, Kaufman Borgeest & Ryan LLP

Will discuss and review issues and concerns specific to this community in terms of better communication, issues with proxies and end of life decisions, rooming and privacy concerns and treatment, staff training, insurance issues, resident social issues.

Thursday, March 30

3:00 p.m. – 3:30 p.m.

*Piercing the Corporate Veil and How Management
Agreements Can Backfire*

Mario, Giannettino, Kaufman Borgeest & Ryan LLP

Joshua C. Anderson, Horne Rota Moos, LLP

In the past, it was common for only the facility or individuals providing direct care to be named as defendants in long-term care lawsuits. Now, plaintiffs are increasingly employing the tactic of suing every individual or entity with any possible connection to the facility regardless of the fact that such persons did not participate in the care. The basic premise behind such suits is to hold owners, members, directors and anyone who can be placed under the wide “corporate” umbrella liable for injury or death of resident, and thereby maximize recovery. Frequently these entities and individuals have nothing to do with the day-to-day operations of the facility or the care given to the resident. Yet, Courts do not seem to be persuaded by the defense argument that without direct involvement or personal participation in the care, no personal liability can attach. In this presentation, we will analyze for seminar attendees why officers and directors potentially face liability exposure despite the lack of any personal contact with the aggrieved party and potential conflict of interest issues that arise when defending both the facility and ownership. We will discuss why cost reports, financial statements, HUD documents and management agreements have become as critical a component in discovery as the resident chart. We will also examine why the judiciary has been reluctant to recognize the distinction between “care” and “operational decisions” and whether “controlling persons” lawsuits potentially run afoul of the business judgment rule, which traditionally insulated corporate directors from tort liability for negligence. In this presentation, seminar attendees will consider how the foregoing concerns were applied in an actual, high-stakes lawsuit against a nursing home and its four individual owners. This presentation will be of interest to those who seek to develop comprehensive insight into and the skills required to competently address claims that nursing homes are nothing more than profit centers, uninterested in resident care.

Thursday, March 30

3:45 p.m. – 4:45 p.m.

*Managing Distinctive Personality Types in the Aging
Services Environment – Promoting Safe Outcomes*

Jonathan D. Rubin, Kaufman Borgeest & Ryan LLP

Jose Guzman, Jr., Hudson Insurance Group

We will discuss and differentiate the unique personality traits seen with caregivers/significant other’s and clients in the aging services settings, and participants will learn how to promote improved communications between healthcare workers, caregivers and clients.

Participants will review updated regulations and utilize this knowledge to develop documentation skills reinforcing patient-centered care planning processes.

- The Passive Aggressive resident and or family member – we will assist you with the identification of triggers influencing the frustration with their care and educate attendees on reasonable approaches.
- The oblivious narcissist personality type who has no empathy or concern for others – how to address these demands and needs and redirect when possible.
- The Schadenfreude type – those who directly or indirectly take satisfaction in the failings or pain of others. This is a personality type to identify on admission, as they are looking for problems from the onset.



Keynote Speaker

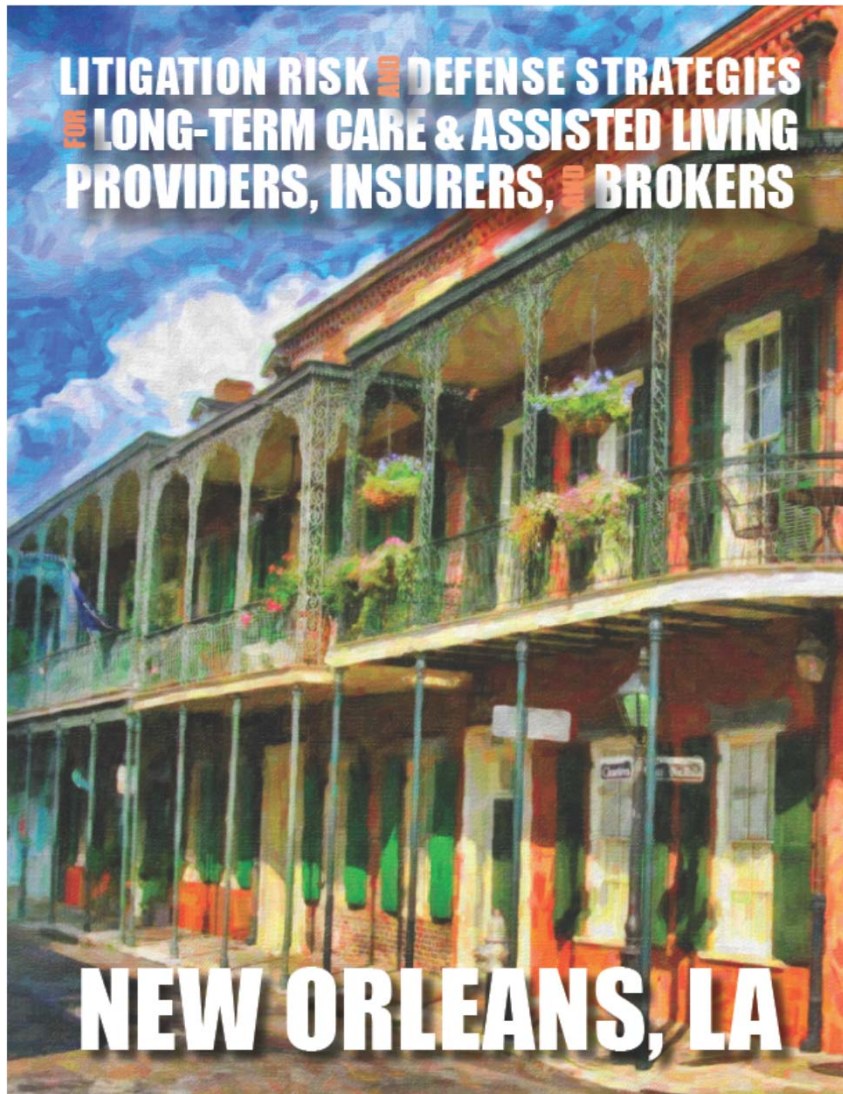
**John Deveney, ABC, APR, Fellow PRSA, IABC Fellow
President, DEVENEY**

Founder of DEVENEY, John Deveney, ABC, APR, Fellow PRSA, IABC Fellow has become a national leader in strategic marketing and communication, known for some of healthcare's best campaigns, results and counsel.

His firm's meteoric start was chronicled through significant national campaigns with particular strength in crisis and healthcare, among others; including some of the most successful national efforts for LCMC Health system, Peoples Health, PhRMA, Arxcel and March of Dimes. DEVENEY was named PR News' Firm of the Year in 2013 and one of PRWeek's Top 5 Boutique PR Firms in 2004 and 2016.

John Deveney was honored as Agency Executive of the Year by PRNews and topped PRWeek's list of the profession's four "Brightest Stars" and "Ambassadors that are Heroes." He is the only professional to ever merit the lifetime achievement recognition of being inducted as both a **Fellow PRSA and an IABC Fellow** — as well as **PRNews Hall of Fame**.

Twitter: [@johndeveney](https://twitter.com/johndeveney) | [Website](#)





Rebecca Adelman, PLLC, Shareholder
Hagwood Adelman Tipton, PC – Memphis, TN

Rebecca Adelman, PLLC is a founding shareholder with Hagwood Adelman Tipton, PC and practices in the firm's Memphis, Tennessee office. She is the chair of the firm's Strategic Planning Committee and Women Rainmakers Mentoring Program. Ms. Adelman concentrates her practice in insurance defense litigation representing national insurance carriers and self-insureds with a concentration in healthcare law. She mediates, arbitrates, and litigates lawsuits before judges and juries in a multitude of specialties including property/casualty, professional liability, labor and employment, long-term care and medical malpractice. Her experience also extends to risk management and organizational counseling and formal programs including comprehensive "expectations management," arbitration training, facility admissions protocols, and crisis communication planning. She is a member of the Claims & Management Litigation Alliance and serves on the Risk Management Work Group of the National Center for Assisted Living. Ms. Adelman is involved in state and national legislative matters on behalf of the healthcare industry and serves as Legal Advisor for the American Assisted Living Nurses Association. She authors a monthly column, The HAT Advantage, for the Nursing & Assisted Living Facility Professional newsletter, and is a regular contributor to other industry publications.



Joshua C. Anderson, Partner
Horne Rota Moos, LLP – Houston, TX

Joshua Anderson is a partner with Horne Rota Moos, LLP in Houston, Texas. Mr. Anderson's practice areas include civil litigation involving health care liability, personal injury, premises liability, insurance coverage, civil rights litigation, and commercial disputes. In the field of health care, Mr. Anderson has represented a host of health care providers at the trial level, including hospitals, physicians, nurses, and long-term care and assisted living facilities. Additionally, Mr. Anderson has an extensive appellate practice and has successfully represented numerous health care providers via the Texas Medical Liability and Insurance Improvement Act's interlocutory appeal process. Mr. Anderson graduated *cum laude* from Tulane Law School in 2000 and obtained his undergraduate degree from Texas A&M University in 1997.



Dennis Cook, Long Term Care Project Line Manager
IronHealth

Dennis is the Long Term Care Product Line Manager of IronHealth. He oversees a team of 7 underwriters and a national book of approximately \$50,000,000 of PL/GL and excess Senior Care business. Dennis has responsibility for profitability, top line, product innovation, marketing, underwriting/pricing of IronHealth's Senior Care business. Dennis has over 13 years experience working in the medical malpractice industry including but not limited to Senior Care. Prior to joining IronHealth Dennis spent over 10 years with AIG with various roles including Long Term Care Product Line Manager, Assistant Product Line Manager for Hospitals and Long Term Care, and Mid Atlantic Regional Manager – Healthcare. Dennis has the CPCU and ASLI designations, a MBA from Babson College's Olin School of business, and a bachelor's degree from St. Michael's College in Vermont.



Mario Giannettino, Attorney
Kaufman Borgeest & Ryan LLP – Valhalla, NY

Mario Giannettino is a member of Kaufman Borgeest & Ryan, LLP and practices in the long-term liability and malpractice groups. Throughout his career, Mario has concentrated on insurance defense litigation. He represents the entire spectrum of health care providers, including residential health care facilities, hospitals, assisted living facilities, visiting nurses and home health care providers, as well as individual physicians, nurses and nurses' aides. Mario has defended hundreds of actions both regionally and nationally. His experience also extends to providing consulting services to the industry. He is a frequent lecturer on issues of concern in the health care industry. Mario is the author of extensive articles about risk management and litigation issues of topical concern to the health care industry that have been featured in publications such as McKnight's and Long-Term Living Magazine.



Jose Guzman, Jr., RN, MS, CPHRM, DFASHRM, Vice President
Hudson Insurance Group – New York

Jose is a Vice President for Hudson Insurance Group and Napa River Insurance Services; his primary office is located in New York. Amongst various responsibilities, Jose has a focus on maximizing the Healthcare division's client services, maximizing departmental processes and, the development of an intuitive online risk management platform for both Hudson Healthcare and Napa River Insurance Services. Jose manages the risk management department operations at Hudson Insurance Group and Napa River Insurance Services ensuring that best practices and evidenced-based practices are shared with policyholders. He is also responsible for the development of standardized risk management assessments as a provision to mitigate risks for clients and assist them benchmark their many successes. He publishes a quarterly magazine for his Hudson and Napa River clients featuring articles and information on emerging healthcare trends, legal, regulatory, claim and patient safety initiatives. Jose collaborates with industry experts to provide his policyholders a monthly live webinar series on topical and emerging healthcare trends. Jose is a Registered Professional Nurse with a graduate degree in Health Services Management and holds various certifications to include the Certified Professional in Healthcare Risk Management (CPHRM) and Distinguished Fellow of the American Society for Healthcare Risk Management (DFASHRM) credentials. Jose is a Board Member-Emeritus for the Association for Healthcare Risk Management of New York- an ASHRM chapter affiliate. Jose brings 30 + years of clinical and administrative healthcare experience, and is a subject matter expert on various risk, quality and patient safety issues. He frequently speaks at national and state level industry forums.



Carl Hagwood, Shareholder
Hagwood Adelman Tipton, PC – Greenville, MS

Carl Hagwood is a shareholder and founding member of Hagwood Adelman Tipton, PC. With over 40 years of active medical malpractice and nursing home litigation experience, Mr. Hagwood is the senior litigator of the firm's Aging Services practice group. Mr. Hagwood has defended general casualty claims, medical malpractice claims against physicians and hospitals and medical negligence claims against nursing home and assisted living providers in Mississippi, Tennessee, Alabama, North Carolina, Colorado, and Florida. Mr. Hagwood and his trial team employ innovative approaches using multiple media visual technology in cases he has tried and as a result, he has given demonstrations of this technology to panel counsel members for leading medical malpractice insurers and at long term care panel counsel meetings. He is a frequent speaker to insurers, self-insured, lawyers, and medical professional on the topic of falls in the long term health care setting and the liability and risk issues involved. Mr. Hagwood is listed in The Best Lawyers in America® since 1995 in the areas of Health Care Law and Medical Malpractice Law and Super Lawyers since 2009 in the area of Medical Malpractice Defense. Mr. Hagwood's professional association memberships include the Washington County Bar Association, the American Bar Association, the Mississippi State Bar, Alabama State Bar, Tennessee State Bar, North Carolina State Bar, Arkansas State Bar, American Society of Hospital Attorneys, Defense Research Institute, Mississippi Defense Lawyers Association, American Board of Trial Advocates, and the Mississippi Bar Foundation. He is admitted to practice law in five states including active trial experience in multiple states. Mr. Hagwood practices in the firm's Greenville, Mississippi office.



Richard (Ric) Henry, President
Pendulum, LLC – Albuquerque, NM

Ric is an owner and managing partner of Pendulum, LLC (formerly LTC Alliance, LLC). Pendulum is a full service risk management company providing services and products to healthcare providers of all types. Pendulum is an independently owned company offering a unique third-party approach balancing risk and defensibility strategies in the healthcare setting.

Ric has worked in the healthcare sector for more than 30 years and is a member of the American college of Health Care Administrators (ACHCA) and a Certified Fellow. He has been licensed as a nursing home administrator in six states, and he holds a current license in Massachusetts. He also has held a certificate as a certified risk manager through the American Society of Healthcare Risk Managers (ASHRM).

Ric has provided training on risk assessment and management, quality assurance, and liability issues in more than 20 states and overseas. He has presented instruction to the New York State Bar Association on nursing home liability and risk management approaches to underwriters at Lloyd's of London, London, England for the past 10 years.



Chastiti N. Horne, Partner
Horne Rota Moos, LLP – Houston, TX

Chastiti Horne is an equity partner with Horne Rota Moos, LLP whose primary practice is healthcare defense. Ms. Horne represents hospitals, physicians, nurses, healthcare staffing agencies, LTC/ALF facilities and dentists in defending against medical malpractice lawsuits. Ms. Horne acts as panel counsel for several national leading NH/ALF companies and for several large hospitals and healthcare staffing companies. Her practice includes trial, appellate, and alternative dispute resolution work. She is the President for the Greater Houston Society of Healthcare Risk Management and on the advisory board for Child Advocates, Inc. She has been the recipient of a number of awards professionally – 2016 South Texas College of Law Alumni Public Service Award, 2014 Woman on the Move by Texas Executive Women, January 2014 “Litigator of the Week” by Texas Lawyer Magazine for a dismissal she obtained for a healthcare client, 2012 Harris County Bench Bar Pro Bono Award for an Individual for her work with Child Advocates, 2008 Time Magazine’s “Salute to Women in Leadership”, 2012-2016 Texas Super Lawyer list, 2007-2011 Texas Rising Star-Super Lawyer, and 2001 Harris County Adult Volunteer of the Year. Ms. Horne is a Life Fellow with the Houston Bar Foundation, member of the Association of Defense Trial Attorneys, and member of Texas Association of Defense Counsel. Chastiti obtained her law degree from South Texas College of Law and undergraduate degree from Stephen F. Austin State University.



Kristina Hulsey, Associate General Counsel
Ensign Services, Inc. – Mission Viejo, CA

Kristina R. Hulsey is Associate General Counsel at Ensign Services, Inc., a subsidiary of The Ensign Group. Mrs. Hulsey received her undergraduate degree in Pre-Law from University of California, Santa Barbara, and her Juris Doctorate from Chapman University School of Law, located in Orange, California. Ms. Hulsey serves as Legal Counsel to Bridgestone Senior Living, Ensign’s portfolio of 47 assisted living and independent living operations located in 9 states. Mrs. Hulsey’s practice primarily consists of employment and labor law, risk and litigation management, and assisted living regulatory matters. Prior to joining Ensign, Ms. Hulsey was Corporate Counsel for Toshiba America Business Solutions in Irvine, California.



J. Roslyn Lemmon, Partner
Cowan & Lemmon, LLP – Metairie, LA

J. Roslyn Lemmon is a founding member, owner, and partner with Cowan & Lemmon, L.L.P. in the firm's Metairie, Louisiana office. Her practice areas include civil litigation involving long-term care liability, premises liability, products liability, automobile liability, medical devices, medical malpractice, maritime law, and employment law. She also serves as insurance company coverage counsel. Ms. Lemmon is the author of several chapters in *Nursing Home Litigation: Pretrial Practice and Trials*, 2nd Edition and has successfully defended clients in state and federal courts throughout Louisiana and Texas. Ms. Lemmon has devoted a substantial portion of her practice to the defense of class action litigation involving breast implants, bone screws, explosions at petrol-chemical plants and long-term care. She has lectured in the fields of medical malpractice, nursing malpractice, nursing home litigation, workers' compensation and compliance with Medicare Section 111 reporting and lien resolution strategies. She is a member of the Louisiana State Bar Association, Texas Bar Association, American Bar Association, New Orleans Bar Association, New Orleans Association of Defense Counsel, The Inns of Court for The New Orleans Bar Association, St. Charles Parish Bar Association, The American Society for Healthcare Risk Management, and The Louisiana Nursing Home Association.



**Jason Lewis, President – Denver
CRC Group – Denver, CO**

Jason Lewis is the National Healthcare Practice Leader and President – Denver for CRC Group, the largest P&C wholesale intermediary in the U.S. The Healthcare Practice Group has over \$300,000,000 in brokerage and MGA annual written premiums. The group includes 10+ brokerage teams and 3 in-house programs underwritten for senior living and medical facilities. In addition, he manages the CRC Denver branch including his production team with \$85,000,000 in annual written premium for healthcare and senior living. Mr. Lewis has been with CRC since 2002 when they acquired his prior firm, American Marketing Center, a leading wholesale brokerage in the Northeast. He joined American Marketing Center in 1995 and started their Healthcare P&C Practice from infancy. Prior to that, he held various positions in provider relations & claims for two managed care organizations.

In addition to serving on numerous carrier advisory councils, he served for 7 years as a NAPSLO Committee member and has been a guest speaker at numerous industry conferences.

He is a graduate of Kutztown University of Pennsylvania with a Bachelor's degree in English.



**Alicia Luke, RNC, LNCC, President & CEO
ALN Consulting – Nashville, TN**

Alicia Luke is a Registered Nurse and a Legal Nurse Consultant Certified. Ms. Luke is the President and CEO of ALN Consulting, a national provider of medical-legal consulting services, in Nashville, Tennessee. Founded in 2002, ALN Consulting's expertise includes, yet is not limited to, the defense of medical malpractice, long-term care, product liability, class action/mass litigation, and toxic Tort claims. Ms. Luke's nursing career spans over 20 years, with noteworthy experience in hospital acute care management, home health agency administration, regulatory compliance auditing, and law firm insurance defense. Ms. Luke carries the only national board certification in legal nurse consulting, and is recognized as a specialist in her field. She is past-president of the Tennessee Chapter of the American Association of Legal Nurse Consultants and is an active member of their national organization. As President and CEO of ALN Consulting, she leads the ALN Consulting team of diverse medical professionals in all specialty divisions. ALN's consultants have decades of clinical expertise in all medical specialties. They are dedicated to providing quality-consulting services that meet the high standards of their clients and in an efficient, cost-conscious manner. Members of the ALN Consulting team are committed members of the legal team, actively collaborating with clients throughout the litigation process to help ensure the best possible case outcomes. The highly skilled nurses of ALN Consulting co-manage cases with the legal team, ensuring more time and energy to concentrate on the matter at hand.



**Lee McClure, Professional Liability Broker
CRC Insurance Services, Inc. – Birmingham, AL**

Lee has been with CRC Insurance Services since September 2010 and currently serves as a Professional Liability Broker. His principal focus is insuring hospitals, nursing homes, miscellaneous medical facilities, and nonprofit social/human service organizations. Prior to being a broker Lee served as the Underwriting Programs Manager for CRC where he oversaw and managed a long term care program and an Employment Practice Liability program. Lee has retail agency experience prior to joining CRC where he specialized in the healthcare industry. Prior to that Lee managed a securitized portfolio aggregating approximately \$122 million, covering a variety of asset classes including senior housing. Lee earned his Commercial Lines Coverage Specialist designation from Hartford Insurance School. He earned his Bachelor of Science degree in Finance from Auburn University.

Lee currently resides in Birmingham, Alabama with his wife Jamie and their four children Miller (6), Carter (3), Whit and Ryland (7 month old twins).



Michael E. Phillips, Shareholder
Hagwood Adelman Tipton, PC – Jackson, MS

Michael E. Phillips is a founding shareholder with Hagwood Adelman Tipton, a member of the Executive Committee, and practices in the Jackson, Mississippi office. He has a diverse litigation practice including premises liability and products liability, with an emphasis on medical malpractice and medical negligence. A significant portion of his cases involves the defense of professionals including physicians and hospitals and nursing homes and assisted living facilities. He handles all phases of the litigation process, with a particular emphasis on trial, and has defended claims against nursing homes and assisted living facilities in Mississippi, Tennessee, Alabama, and North Carolina. Mr. Phillips holds the AV Preeminent® Peer Review Rating from Martindale-Hubbell, its highest rating for ethical standards and legal ability. He is a graduate of Louisville High School in Louisville, Mississippi. While in law school, he was the recipient of the Mississippi College Alumni Scholarship. After law school, he served as a judicial law clerk for The Honorable William L. Waller, Jr. of the Mississippi Supreme Court.



Jonathan D. Rubin, Senior Partner
Kaufman Borgeest & Ryan LLP – New York, NY

Jonathan D. Rubin is a partner in Kaufman Borgeest & Ryan LLP's New York City office. Mr. Rubin focuses his practice on representing long term care and assisted living facilities, hospitals, physicians and health care professionals in civil litigation matters including Medical Malpractice Defense, Long Term Care and Nursing Home Defense, Health Care, Products Liability Defense and General Liability Defense Litigation. Mr. Rubin also has particular expertise in the defense of mental health providers, and has lectured extensively on the litigation of complex medical malpractice matters as well as a variety of risk management and confidentiality issues for a wide variety of health professionals and institutions. In addition to the representation of insureds in medical malpractice and other professional liability claims throughout the discovery process and at trial in state and federal courts, he has represented physicians and other medical professionals in disciplinary actions before the New York State Department of Health and Department of Education. Mr. Rubin is a former President of The Association for Healthcare Risk Management of New York, Inc. and is a member of the New York State Bar Health Law section.



Carl Swan, National Senior Living Practice Sales Executive
Propel Insurance – Portland, OR

Carl Swan is National Senior Living Practice Sales Executive with Propel Insurance in Portland, Oregon. As a Senior Living Practice team member at Propel Insurance, Mr. Swan helps to oversee the direction, growth and value proposition Propel offers its Senior Living clients nationally. With a focus on liability risk management solutions for the Senior Living industry nationwide, Mr. Swan is always looking to find innovative ways to protect and support his clients. With a commitment to delivering first in class insurance products and training resources, he supports the risks his clients take every day. This drives Mr. Swan and his team to remain on the pulse of changes in the marketplace, enabling his clients to not only stay prepared, but to stay ahead of their competition as well. Mr. Swan holds an undergraduate degree from Northwest Christian University in Eugene, Oregon and a Master's Degree from Pacific University in Forest Grove, Oregon.



Tony Stompanato, Regional Vice President
AIG Claims, Inc. – Chicago, IL

Mr. Stompanato is the Regional Vice President of the Chicago Healthcare claim group for AIG, a New York-based global provider of Commercial and Personal insurance services. He has extensive experience in the healthcare medical malpractice field and is currently responsible for all claim-related activity for the Chicago and London offices. He serves as a liaison for AIG's underwriting team, assisting with new and renewal marketing efforts as well as addressing claim-related client concerns on a nation-wide basis. Mr. Stompanato's team is part of AIG's Elder Care subcommittee, working closely with AIG's Elder Care Specialty counsel toward proactive claim evaluation and resolution of elder care matters.

A resident of Chicago, Mr. Stompanato is a frequent panel member, speaking on topics such as Bad Faith, proper claim handling and trends in the medical malpractice area. Mr. Stompanato holds licenses in all 28 states that require such qualification.



Leah T. Therio, Associate
Cowan & Lemmon, LLP – Metairie, LA

Leah T. Therio is an associate with Cowan & Lemmon and practices in the firm's Metairie, Louisiana office. She is a member of the Louisiana Bar Association, the New Orleans Bar Association and the St. Charles Parish Bar Association. Ms. Therio practice focuses on medical malpractice defense with an emphasis on hospital liability. She has gained considerable experience in hospital emergency preparedness through her representation of several local hospitals in connection with Hurricane Katrina-related claims. Ms. Therio practice areas further include premises liability, insurance defense and automobile liability. She regularly offers seminars on compliance with Medicare Section 111 reporting and lien resolution strategies for litigation. Ms. Therio received her B.A. in 2004 from Tulane University and her J.D. from Loyola University College of Law in 2007.



Steven D. Weiner, Partner
Kaufman Borgeest & Ryan LLP – Valhalla, NY

Steven D. Weiner is a partner with Kaufman Borgeest & Ryan concentrating his practice on the defense of medical professionals in medical malpractice and negligence actions. His focus is in the areas of skilled nursing, assisted living, home care and ancillary services provided to the aging. He is also a licensed pharmacist. He received his Bachelor of Science in Pharmacy from St. John's in New York in 1982 and his Juris Doctorate from St. John's University School of Law in 1985. He has served as both supervisory and monitoring counsel and as trial counsel. In addition, Mr. Weiner has lectured considerably to the insurance industry, as well as provided numerous in-service lectures to long-term care providers in matters pertaining to the defense of nursing homes. He has served as national counsel for several prominent insurers in the long-term care industry and has been retained to audit internal files of insurance companies who specialize in this area. He is a frequent speaker at seminars and before facilities and healthcare organizations focused on aging services, including most recently speaking at the American Society of Healthcare Risk Managers convention, which draws thousands of risk managers and insurance representatives yearly to its seminars.

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The American Assisted Living Nurses Association (AALNA) is a professional nursing association representing assisted living registered nurses, licensed practical nurses, and licensed vocational nurses. Our number one goal is to promote safe, effective, and dignified nursing practice in assisted living. With over one million older

adults residing in assisted living communities and given the actual and potential increase in the nature and intensity of their health and personal care needs, the demand for licensed nurses in this domain is making assisted living one of the fastest growing segments in the nursing spectrum. As such, we hold ourselves accountable for our nursing practice.

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