

Thursday, May 19, 2016 at The Adobe Conference Centre 343 Preston Street, Ottawa

Tactical and Practical Approaches to Purposeful Adjusting

Presented by Forget Smith Morel and OVAA

Agenda

8:30 am Registration

9:00 am Opening Remarks

Marc Smith (Forget Smith Morel), Andrew Lillico (Travelers Canada), and Karen Borovay (Forget Smith Morel).

9:15 am Taking Statements and Getting the Information You Need

Expanding on the modified-pure version of statement-taking to ensure that you have the information you need from claimants, insureds, and third parties. Addressing proper techniques to determine whether and when to use follow-up questions, how to pose questions without guiding witnesses, and deciding what can or should be expanded upon. Other topics will include: legal requirements in disclosing statements; recorded versus written statements; recanting statements; and potential capacity issues.

Moderator: *Andrew Lillico* (Travelers Canada)

Panelists: *Dan Buch* (ClaimsPro – Vice President, Eastern Ontario);
Ron Bouwmeister (The Commonwell Mutual Insurance Group – Vice President, Claims);
Eric Colson (PCA Adjusters – Independent Claims Adjuster)

10:15 am Coffee Break

10:30 am The Do's and Don'ts of Adjusters' Notes and E-mails

Adjusters' notes often come under scrutiny, so this panel will delve into what lawyers tend to look for when they are working both for and against you. Having this information, it may be easier to make decisions about what is needed and what is not, how to word information, when to cut off email chains, and so on. We will explore the legal side of the issue by reviewing what the Courts have said with respect to the production of adjusters' notes.

Moderator: *Karen Borovay* (Forget Smith Morel)

Panelists: *Kelly Edwards* (Economical Insurance – Team Leader, National Subrogation Unit, Claims);
Kristi Chatterton (The Cooperators – National Claims Specialist);
Wayne Marlatt (Intact Insurance – Property Claims Manager)

12:00 pm Lunch - Catered by Thyme & Again Creative Catering

1:00 pm Adjuster as Witness at Examinations for Discovery

Two mock Examinations for Discovery of an adjuster (Property and Accident Benefits) will demystify this process and provide tips, tools, and information for adjusters produced as witnesses. A panel discussion allows for elaboration on what is being staged, as well as an interactive discussion regarding preparation for and attendance at Examinations for Discovery.

Moderator: *Marc Smith* (Forget Smith Morel)

Panelists: *Donna van Gulik* (The Cooperators - Region Claims Representative);
Andrew Lillico (Travelers Canada – Claims Manager, Property);
Louise Morel (Forget Smith Morel);
Tara Sweeney (Soloway Wright LLP)

2:30 pm End of Seminar

Registration is limited.

To register for this complimentary seminar and lunch, please e-mail Kim McKerracher at kmckerracher@forgetsmith.com no later than May 12, 2016.

Our complimentary seminar and lunch has been generously sponsored by:

