



DRI delivers **resources** to build your practice

# Life, Health, Disability, and ERISA

- The latest trends and developments in life, health, disability, and ERISA law
- Three days of networking and business development opportunities with prominent in-house and outside counsel
- Breakout sessions on ERISA, Non-ERISA, and Health, plus a new Introductory track, which allow you to tailor the seminar to fit your practice
- Earn up to 11.5 hours of CLE, including one hour of ethics credit
- Receive a complimentary copy of the updated *ERISA Litigation Primer*



April 3-5, 2019

Swissôtel Chicago

Chicago, IL

**D**Rl's Life, Health, Disability, and ERISA Seminar is the annual must-attend event for anyone whose practice touches any of these areas. It offers 23 substantive presentations, in which leading practitioners will provide insights into trends and developments in the law, as well as practical tips you will not want to miss. All of your favorite networking opportunities are back, including the Women's Networking Dinner, dine-arounds, a post-dinner reception hosted by the Young Lawyers Subcommittee, multiple DRI for Life events and new this year, an on-site community service project.



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PRESENTED BY **DRI's Life, Health, and Disability Committee**

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Register online now at [dri.org](http://dri.org) or complete the form in the back.

## What You Will Learn



- The impact of the DOL's 2018 disability claims regulations
- What to expect from the United States Supreme Court in the near future
- Cybersecurity and privacy requirements and pitfalls
- Practical tips for defending health insurance class actions
- Updates on life, health, disability, and ERISA litigation
- And much more!

*“It is good for case law updates, it is relevant to insurance work at my company, and it covers a broad range of topics.”*

## Members Get More

- Access to **LegalPoint**™ at **dri.org**: Committee newsletters, seminar course materials, and other publications.
- Access to the **DRI Life, Health, and Disability Committee Community**: Share articles, post blogs, and connect with others on the latest trends in your area of practice.
- Access to **dri circles**, where lawyer-to-lawyer connections happen. Search **dri circles** in your app store:



Use dri™ Dividends Points to **reduce your registration fee**:

- Recruit a member
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- ...and more!

Visit **dri.org**, go to **My DRI** and click on **DRI Dividends** to see your balance.

Get engaged, get recognized, and get rewarded.

## PROGRAM SCHEDULE

### WEDNESDAY, APRIL 3

#### DRI for Life Run/Walk

8:00 a.m. | Arriving in Chicago early? Want to enjoy some fresh air and networking? Gather in the hotel lobby for an energizing run/walk around town and get a head start on building your contacts.

#### 10:00 a.m. Hands-On Community Service Project

Network for a great cause! Join your colleagues in an on-site service project benefitting the Chicago chapter of **Cradles to Crayons**. We will be packing donated articles at the conference hotel to help local children survive and thrive. Information on signing up will be sent to registrants in advance. For more information, contact Julie Wall at [jwall@cmn-law.com](mailto:jwall@cmn-law.com).

#### 12:00 p.m. Registration

#### 2:00 p.m. Breakout Sessions (see page 3)

#### DRI for Life Book Club

5:15 p.m. | Join us to take a break from law and discuss literature. The book will be selected several weeks before the seminar and is guaranteed to contain no case citations! For more information, contact Joshua Lerner at [jlerner@rumberger.com](mailto:jlerner@rumberger.com).

5:30 p.m. **Meeting for First-Timers and Attendees Interested in the LH&D Committee** | Get the most out of the seminar. Come visit with committee leaders and learn how to become engaged in the committee and all the resources it offers.

6:00 p.m. **Networking Reception**  
SPONSORED BY **Fox Rothschild LLP**

**Funk & Bolton**  
**Nelson Mullins Riley & Scarborough LLP**

7:30 p.m. **Women's Networking Dinner** | Meet and dine with other prominent women professionals in the industry at this incredibly fun and popular event. Details for signing up will be circulated to registrants in advance of the seminar. (*Limited availability.*)

View faculty bios on the **Life, Health, Disability, and ERISA Seminar webpage**; click on "View speakers" button.

7:30 p.m. **Dine-Arounds** | Join colleagues and friends at selected restaurants for dinner and great company. Details for signing up will be circulated to registrants in advance of the seminar.

### THURSDAY, APRIL 4

#### DRI for Life Run/Walk

6:30 a.m. | Early riser? Gather in the hotel lobby for an energizing run/walk with fellow life, health, and disability practitioners.

#### 7:30 a.m. Registration

7:30 a.m. **Continental Breakfast**  
SPONSORED BY **Bodman PLC**  
**Chittenden Murday & Novotny LLC**

8:30 a.m. **Welcome and Introductions**  
**Patrick W. Begos**, *Robinson & Cole LLP*, Stamford, CT  
**Christopher T. (Chris) Sheean**, *Swanson Martin & Bell LLP*, Chicago, IL

8:40 a.m. **Can We Have a Little Privacy, Please?**  
Experienced practitioners will provide guidance on current cybersecurity and privacy requirements and pitfalls, including discussing HIPAA, GDPR, and state privacy statutes.

 **Lisa Copp**, *CNO Financial Group Inc.*, Carmel, IN

**Stephen E. Reynolds**, *CIPP/US, CISSP*, *Ice Miller LLP*, Indianapolis, IN

9:25 a.m. **SSDI Primer for LTD Attorneys**  
Social Security disability decisions are a part of many long term disability cases, and plans are typically obligated to consider them. Learn the key similarities and differences between SSDI and LTD claims.

**Ann-Martha Andrews**, *Ogletree Deakins Nash Smoak & Stewart PC*, Phoenix, AZ

**The Honorable Brian G. Kanner**, Bronx, NY

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**10:10 a.m. Refreshment Break**SPONSORED BY **Nawrocki Smith LLP****Saul Ewing Arnstein & Lehr LLP****10:30 a.m. A Tangled Web: Rescission and Proving Intent to Deceive**

Rules regarding fraud-based rescission claims vary from state to state. Learn about the standards and strategies for proving fraud.

**Sarah J. Delaney**, *Goldberg Segalla LLP*,  
Buffalo, NY

**11:15 a.m. Self-Funded Health Plans and Third-Party Administrators**

The trend toward self-funded health plans is changing the landscape of health insurance, and third-party administrators play a vast role in those plans.

**Fallyn B. Cavalieri**, *Gerber Ciano Kelly Brady LLP*,  
Buffalo, NY

◆◆ **Bob Madden**, *Lawley Insurance*, Buffalo, NY

**BREAKOUT SESSIONS** Wednesday, 2:00 p.m.–5:00 p.m.**NEW!**

	■ ERISA	■ NON-ERISA	■ HEALTH	■ INTRODUCTORY
2:00 p.m.	<b>Personal Jurisdiction, Venue, and Forum Selection Clauses</b> <b>Amy L. Blaisdell</b> , <i>Greensfelder Hemker &amp; Gale PC</i> , Saint Louis, MO	<b>Defending Subjective Disorder Claims</b> <b>Joshua D. Lerner</b> , <i>Rumberger Kirk &amp; Caldwell</i> , Miami, FL	<b>Behavioral Health and Substance Abuse Benefit Litigation</b> <b>Leigh Anne Hodge</b> , <i>Bradley Arant Boulton Cummings LLP</i> , Birmingham, AL	<b>Disability Insurance 101</b> <b>Linda M. Lawson</b> , <i>Meserve Mumper &amp; Hughes LLP</i> , Los Angeles, CA
2:55 p.m.	<b>Claim Valuation for Litigation</b> ➤ <b>Z. Logan Gould</b> , <i>The Guardian Life Insurance Company of America</i> , New York, NY ➤ <b>Annie Hong</b> , <i>Cigna Corporation</i> , Glendale, CA <b>Nancy Jerian Marr</b> , <i>Burke Williams &amp; Sorensen LLP</i> , Los Angeles, CA	<b>Fair or Foul: Defending UTPA and UIPA Claims</b> <b>Dennis J. Rhodes</b> , <i>Wilson Elser Moskowitz Edelman &amp; Dicker LLP</i> , San Francisco, CA	<b>Non-Participating Provider Litigation Update</b> <b>Dorothy Hubbard Cornwell</b> , <i>Smith Moore Leatherwood LLP</i> , Atlanta, GA	<b>Health Insurance 101</b> <b>Bryan D. Bolton</b> , <i>Funk &amp; Bolton PA</i> , Baltimore, MD
3:50 p.m.	<b>Refreshment Break</b>			
4:05 p.m.	<b>Conversion, Portability, and Evidence of Insurability</b> <b>Jeannine C. Jacobson</b> , <i>Robinson &amp; Cole LLP</i> , Miami, FL	<b>Defending Mental Illness Claims When There Is Evidence of Deception</b> ◆◆ <b>David Fisher, PhD, LP, ABPP</b> , <i>PsyBar LLC</i> , Minneapolis, MN <b>William D. Hittler</b> , <i>Nilan Johnson &amp; Lewis PA</i> , Minneapolis, MN	<b>Managing Care: E.R. Reimbursement and Other Participating Provider Issues</b> <b>Theodore J. (Ted) Tucci</b> , <i>Robinson &amp; Cole</i> , Hartford, CT	<b>Life and Accidental Death Insurance 101</b> <b>Leonor M. (Leo) Lagomasino</b> , <i>Hinshaw &amp; Culbertson LLP</i> , Miami, FL

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- 12:00 p.m. **Lunch** (*on your own*)
- 12:00 p.m. **Diversity and Inclusion Luncheon** | This popular luncheon provides the opportunity to network with others who are passionate about diversity and will feature Thom Gossom, Jr., author and actor. Those interested in attending must reply to an invitation from the sponsor, which will be sent to registrants in advance of the seminar. (*Limited availability*)  
HOSTED BY **Sirote & Permutt PC**
- 1:30 p.m. **Schmidtke on ERISA**  
Mark Schmidtke, a leading authority on ERISA, will discuss the latest in cutting-edge ERISA issues, including Supreme Court developments and timely issues affecting life, health, and disability insurance providers.  
**Mark E. Schmidtke**, *Ogletree Deakins Nash Smoak & Stewart PC*, Valparaiso, IN
- 2:25 p.m. **Disability Litigation Update**  
Learn about the most significant state and federal court decisions relating to individual and ERISA-governed disability claims, with a discussion of recent trends and challenges.  
**Joseph M. Hamilton**, *Mirick O'Connell DeMallie & Lougee LLP*, Worcester, MA
- 3:10 p.m. **Refreshment Break**  
SPONSORED BY **White and Williams LLP**
- 3:30 p.m. **Supreme Court Review**  
An experienced Supreme Court litigator will discuss recent and potential future Supreme Court cases and developments that affect life, health, disability, and ERISA practitioners and provide insight into the future direction of the Court.  
**Catherine M.A. Carroll**, *Wilmer Cutler Pickering Hale and Dorr LLP*, Washington, DC
- 4:15 p.m. **Adjourn**
- 4:15 p.m. **In-House/Corporate Counsel Breakout Meeting** (*exclusively for in-house/corporate counsel*)
- 4:15 p.m. **Bootcamp Alumni and Young Lawyers Event: Building for the Future** | Hear advice from

committee members on how to get the most out of this seminar and the Life, Health, and Disability committee, from client development to networking and practice tips. Don't miss this opportunity to invest in yourself and your career. (*Open to DRI LH&D Bootcamp alumni and attorneys in practice seven years or less.*)

- 5:00 p.m. **Life, Health and Disability Committee Meeting** (*open to all*) | Learn about upcoming events being planned for the rest of 2019 and into 2020, including the 2020 seminar and how you can help plan it. This is where it all begins, and we to hope to see you there!
- 6:00 p.m. **Networking Reception**  
SPONSORED BY **Wilson Elser Moskowitz Edelman & Dicker LLP**
- 7:30 p.m. **Dine-Arounds** | Join colleagues and friends at selected restaurants for dinner and great company. Details for signing up will be circulated to registrants in advance of the seminar.
- 9:30 p.m. **Young Lawyers' Post-Dinner Reception** (*everyone invited*) | Whether you are young or young at heart, everyone is welcome at this popular networking event. (*More details on-site.*)

## FRIDAY, APRIL 5

### DRI for Life Run/Walk

6:30 a.m. | Early riser? Gather in the hotel lobby for an energizing run/walk with fellow life, health, and disability practitioners.

- 7:30 a.m. **Registration**
- 7:30 a.m. **Continental Breakfast**  
SPONSORED BY **Bradley Arant Boult Cummings LLP**
- 8:30 a.m. **Announcements**  
**Sarah J. Delaney**, *Goldberg Segalla LLP*, Buffalo, NY
- 8:35 a.m. **Disability Claim Regulations: The First Year**  
Experienced in-house and outside counsel will address the effect of the 2018 DOL dis-



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ability claim regulations on claim practices and litigation.

**Joshua Bachrach**, *Wilson Elser Moskowitz Edelman & Dicker LLP*, Philadelphia, PA

➔ **Lisa E. Montelongo-Connor**, *Unum Group*, Chattanooga, TN

➔ **Christine Olson Zdrojeski**, *The Hartford*, Hartford, CT

9:25 a.m.

### **Defense Strategies in Healthcare Provider and Subscriber Class Actions**

Learn how to develop and successfully execute winning strategies in today's provider and subscriber class actions.

➔ **Brett J. Boskiewicz**, *Cigna Corporation*, Bloomfield, CT

**James Lewis Griffith, Jr.**, *Reger Rizzo & Darnall LLP*, Philadelphia, PA

### 10:10 a.m. **Refreshment Break**

SPONSORED BY **Nilan Johnson Lewis PA**

### 10:30 a.m. **Life Insurance Update**

Learn about the most significant state and federal court decisions relating to life insurance, with a discussion of recent trends and challenges.

**Leasa M. Stewart**, *GableGotwals*, Oklahoma City, OK

### 11:15 a.m. **Uses and Abuses: The Ethics of Social Media**

Facebook, LinkedIn, Twitter, and many more social media platforms are a significant part of modern life for most people. What can—and can't—lawyers do when using social media in our professional lives and practices?

**Elizabeth G. Doolin**, *Chittenden Murday & Novotny LLC*, Chicago, IL

### 12:15 p.m. **Adjourn**

*“I regularly participate in this committee, and many of my clients attend this seminar. It is the ‘must attend’ event of the year for any LHD practitioner.”*



### **Diversity and Inclusion in DRI: A Statement of Principle**

DRI is the largest international membership organization of attorneys defending the interests of business and individuals in civil litigation.

Diversity is a core value at DRI. Indeed, diversity, which includes sexual orientation, is fundamental to the success of the organization, and we seek out and embrace the innumerable benefits and contributions that the perspectives,

backgrounds, cultures, and life experiences a diverse membership provides.

Inclusiveness is the chief means to increase the diversity of DRI's membership and leadership positions. DRI's members and potential leaders are often also members and leaders of other defense organizations. Accordingly, DRI encourages all national, state, and local defense organizations to promote diversity and inclusion in their membership and leadership.

### **Harassment and Discrimination**

DRI is committed to the policy of equal opportunity regardless of race, color, religion, sex, sexual orientation, gender, national origin and disability in all of its programs and activities, as well as maintaining an environment in our programs and activities which is free from all forms of harassment or discrimination of any kind. Pursuant to this policy, if any person who attends our programs or activities experiences unlawful discrimination or harassment, this should be reported to the Executive Director so that appropriate action may be taken.



## GENERAL INFORMATION

### In-House Counsel

In-house counsel are eligible for free registration to DRI seminars. In-house counsel are defined as licensed attorneys who are employed exclusively by a corporation or other private sector organization for the purpose of providing legal representation and counsel only to that corporation, its affiliates, or its subsidiaries. To qualify for free registration, in-house counsel must be a DRI member and a member of the DRI Corporate Counsel Committee *or* be sponsored by a DRI member who is both registered and has paid for the seminar.

**Nonmember in-house counsel may utilize this offer only once. This offer excludes the DRI Annual Meeting and the DRI Business Management Principles for Lawyers Seminar.**

### Claims Executives

Claims professionals are eligible for free registration to DRI seminars. Claims professionals are defined as any individuals employed by a corporation or insurance company, who spend a substantial portion of their professional time hiring or supervising outside counsel in the representation of businesses, insurance companies or their insureds, associations, or governmental entities in civil litigation. To qualify for free registration, the claims professional must be a DRI member under a corporate membership *or* be sponsored by a DRI member who is both registered and has paid for the seminar. **Nonmember claims professionals may utilize this offer once per calendar year. This offer excludes the DRI Annual Meeting.**

### CLE/Claims Adjusters Accreditation

This seminar has been approved for MCLE credit by the State Bar of California for up to **11.50** hours, including **1** hour of ethics credit. Accreditation has been requested from every state with mandatory continuing legal education (CLE) requirements. Certificates of attendance will be provided to each attendee. Attendees are responsible for obtaining CLE credits from their respective states. **Application has been made for continuing education for claims adjusters.** Credit availability and requirements vary from state to state; please **check the DRI website at [dri.org](http://dri.org)** for the latest information for your state.

### Registration Policy

**Save \$100 when you register by March 4, 2019.** (See the registration form for pricing.) The registration fee includes course materials, continental breakfasts, refreshment breaks, networking receptions, and access to the DRI App. If you wish to have your name appear on the registration list distributed at the conference and receive the course

materials in advance, DRI must receive your registration by **March 11, 2019** (*please allow 10 days for processing*). Registrations received after **March 11, 2019**, will be processed on-site.

### Refund Policy

The registration fee is fully refundable for cancellations received on or before **March 11, 2019**. Cancellations received after **March 11** and on or before **March 18, 2019**, will receive a refund, less a \$100 processing fee. Cancellations made after **March 18** will not receive a refund, but a \$100 certificate good for any DRI seminar within the next 12 months will be issued. All cancellations and requests for refunds must be made in writing. Fax (312.795.0747) or email ([seminars@dri.org](mailto:seminars@dri.org)) to DRI's Accounting Department. Processing of refunds will occur within four weeks after the date of the seminar. All refunds will be processed in the same method that the payment was received. Substitutions may be made at any time without charge and must be submitted in writing.

### Discounts

**Group Discount** The first and second registrations from the same firm or company are subject to the fees outlined previously. The registration fee for additional registrants from the same firm or company is **\$775**, regardless of membership status if received on or before **March 4, 2019**. After **March 4**, the group rate is **\$875**. All registrations must be received at the same time to receive the discount.

**Travel Discounts** DRI offers discounted meeting fares on various major air carriers for **DRI Life, Health, Disability, and ERISA Seminar** attendees. To receive these discounts, please contact Direct Travel, DRI's official travel provider, at 800.840.0908. As always, to obtain the lowest available fares, early booking is recommended.

- The taping or recording of DRI seminars is prohibited without the written permission of DRI.
- Speakers and times may be subject to last-minute changes.
- A small portion of your room rate offsets the costs of the seminar.
- DRI policy provides there will be no group functions sponsored by others in connection with its seminars.

### Hotel Accommodations

A limited number of discounted hotel rooms have been made available at **Swissôtel Chicago, 323 East Upper Wacker Drive, Chicago, IL 60601** ([click here](#) to view hotel photos).

Take advantage of the group rate of **\$259 Single/Double** in one of two ways:

- 1) Reserve online: [Click here](#) or visit [dri.org](http://dri.org) and go to the **DRI Life, Health, Disability and ERISA Seminar page** and click on the "Book hotel" button.
- 2) Or **contact the hotel directly at 312.565.0565** and mention the **DRI Life, Health, Disability, and ERISA Seminar**.

The hotel block is limited and rooms and rates are available on a first-come, first-served basis. You must make reservations by **March 4, 2019**, to be eligible for the group rate. Requests for reservations made after **March 4** are subject to room and rate availability.



## FACULTY

**Ann-Martha Andrews**, Ogletree Deakins Nash Smoak & Stewart PC, Phoenix, AZ

**Joshua Bachrach**, Wilson Elser Moskowitz Edelman & Dicker LLP, Philadelphia, PA

**Patrick W. Begos**, Robinson & Cole LLP, Stamford, CT

**Amy L. Blaisdell**, Greensfelder Hemker & Gale PC, Saint Louis, MO

**Bryan D. Bolton**, Funk & Bolton PA, Baltimore, MD

➤ **Brett J. Boskiewicz**, Cigna Corporation, Bloomfield, CT

**Catherine M.A. Carroll**, Wilmer Cutler Pickering Hale and Dorr LLP, Washington, DC

**Fallyn B. Cavalieri**, Gerber Ciano Kelly Brady LLP, Buffalo, NY

➤ **Lisa Copp**, CNO Financial Group, Inc., Carmel, IN

**Dorothy Hubbard Cornwell**, Smith Moore Leatherwood LLP, Atlanta, GA

**Byrnie J. Decker**, Ogletree Deakins Nash Smoak & Stewart PC, Portland, ME

**Sarah J. Delaney**, Goldberg Segalla LLP, Buffalo, NY

**Elizabeth G. Doolin**, Chittenden Murday & Novotny LLC, Chicago, IL

◆◆ **David Fisher, PhD, LP, ABPP**, PsyBar LLC, Minneapolis, MN

➤ **Z. Logan Gould**, The Guardian Life Insurance Company of America, New York, NY

**James Lewis Griffith, Jr.**, Reger Rizzo & Darnall LLP, Philadelphia, PA

**Joseph M. Hamilton**, Mirick O'Connell DeMallie & Lougee LLP, Worcester, MA

**William D. Hittler**, Nilan Johnson & Lewis PA, Minneapolis, MN

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➤ **Annie Hong**, Cigna Corporation, Glendale, CA

**Leigh Anne Hodge**, Bradley Arant Boult Cummings LLP, Birmingham, AL

**Jeannine C. Jacobson**, Robinson & Cole LLP, Miami, FL

**The Honorable Brian G. Kanner**, Bronx, NY

**Leonor M. (Leo) Lagomasino**, Hinshaw & Culbertson LLP, Miami, FL

**Linda M. Lawson**, Meserve Mumper & Hughes LLP, Los Angeles, CA

**Joshua D. Lerner**, Rumberger Kirk & Caldwell, Miami, FL

◆◆ **Bob Madden**, Lawley Insurance, Buffalo, NY

**Nancy Jerian Marr**, Burke Williams & Sorensen LLP, Los Angeles, CA

➤ **Lisa E. Montelongo-Connor**, Unum Group, Chattanooga, TN

**Stephen E. Reynolds, CIPP/US, CISSP**, Ice Miller LLP, Indianapolis, IN

**Dennis J. Rhodes**, Wilson Elser Moskowitz Edelman & Dicker LLP, San Francisco, CA

**Mark E. Schmidtke**, Ogletree Deakins Nash Smoak & Stewart PC, Valparaiso, IN

**Christopher T. (Chris) Sheean**, Swanson Martin & Bell LLP, Chicago, IL

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Registration fee includes seminar attendance, networking receptions, course materials, and access to the DRI App. DRI will email a link to download the course materials to all registrants two weeks in advance of the seminar. Only members of DRI will have access to the PowerPoint presentations after the seminar.

	On or before Mar. 4, 2019	After Mar. 4, 2019	
<input type="checkbox"/> Member	\$875	\$975	<i>For inclusion on the preregistration list and to receive course materials in advance, <b>register by March 11, 2019.</b></i>
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## Life, Health, Disability, and ERISA

April 3-5, 2019  
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