



CIPC

CONFERENCE

2020

February 5 - 6, 2020

Bellagio Hotel & Casino | Las Vegas, NV



TABLE OF CONTENTS

About the CIPC	03
Sponsorship/Exhibitor Opportunities	06
CIPC Membership Information	12



About the CIPC

Council For Insuring Private Clients

MarketScout founded the Council for Insuring Private Clients (CIPC) to provide a venue where agents and insurers may collaborate on how to better serve their private clients. Insuring wealthy individuals is a unique, specialty area of the insurance industry and until now, there wasn't a forum for sharing ideas and perfecting skills. The CIPC will focus on implementing best practices and risk management techniques for insuring the personal assets of private clients. Any agent or insurer with a focus on insuring high net worth individuals may join the CIPC.

AIG, Chubb, Price Forbes and The National Alliance for Education and Research are Strategic Partners of the CIPC.

The annual CIPC Conference provides attendees the opportunity to network with high net worth insurers, agents, investors and others involved in the high net worth space. It will also focus on specific presentations designed to improve the art and science of insuring private clients.

In 2012, the CIPC made plans to develop the educational programs required for an individual to obtain a new designation, Certified Personal Risk Manager (CPRM). The CPRM designation program is specifically designed for the high net worth insurance industry. In May 2014, the CIPC, in collaboration with The National Alliance for Insurance Education & Research announced the development of the Certified Personal Risk Manager (CPRM) Program. The purpose of the CPRM program is to train the insurance and risk management communities to better serve the high net worth and affluent client base. The program's five major areas of emphasis will include personal risk management, insurance coverage differences, evaluation and protection of the lifestyle, the practical application, and management of the business of high net worth and affluent clients.

The future direction of the CIPC will be built on a collaborative platform with all members having a voice in how we work to improve the private client insurance industry.



About the CIPC

Founder



Strategic Partners



2019 Sponsors



2019 Exhibitors

AIG, Castle High Value Surveys, Chubb, Exotic Car Collection, FloLogic, HazardHub, Leak Defense, MarketScout, Water Security Solution, York Risk Services



About the CIPC

Advisory Board

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President
The Horton Group
Orland Park, IL

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Chubb
Whitehouse Station, NJ

Robert Haibi

Chief Field Executive
AIG
New York, NY

Kathryn Norris

VP, Family Office Practice Leader
Personal Risk Services
Chubb
Chicago, IL

Lynn Rasmussen

Senior Vice Present, National Practice Leader
Lockton Companies
Tampa, FL

Laura Sherman

Founding Partner
Baldwin Krystyn Sherman Partners
Tampa, FL

Sharon Posman, CIC, AFIS, CISR

Vice President & Member
Lipscomb & Pitts Insurance LLC
Memphis, TN

Shari Violas

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Insurance Brokers
Sherman Oaks, CA

Robert F. Larocca

Executive Vice President
SterlingRisk
New York, NY



Sponsorship & Exhibitor Opportunities





Sponsorship Opportunities

PLATINUM SPONSORSHIP – \$10,000

- Maximum exposure at 2020 CIPC Conference
- Complimentary CIPC Corporate Membership which includes up to 10 Retail Agent Memberships
- 4 complimentary registrations to the CIPC Conference
- Sponsor recognition in opening remarks
- Opportunity to provide speaker in session content as a presenter, panelist or moderator (if applicable)
- Prominent logo and url posting on www.privateclientcouncil.com
- Company name included on all pre-event press releases and advertisements
- Company name/logo in conference program, on-site event signage, general sessions

GOLD SPONSORSHIP – \$5,000

- 5 Individual Memberships to the CIPC
- 3 complimentary registrations to the CIPC conference
- Sponsor recognition in opening remarks
- Prominent logo and url posting on www.privateclientcouncil.com
- Company name/logo in attendee handbook, on-site event signage, general sessions

SILVER SPONSORSHIP – \$2,500

- 3 Individual Memberships to the CIPC
- 2 complimentary registrations to the CIPC conference
- Acknowledgement and url posting on www.privateclientcouncil.com
- Company name/logo in attendee handbook, on-site event signage, general sessions

BRONZE SPONSORSHIP – \$1,000

- 2 Individual Memberships to the CIPC
- 1 complimentary registration to the CIPC conference
- Acknowledgement and url posting on www.privateclientcouncil.com
- Company name/logo in attendee handbook, on-site event signage, general sessions

Sponsorship Opportunities

KEYNOTE SPEAKER – \$5,000 (1 available)

- Two minutes of podium time to highlight your company and introduce speaker
- 5 Individual Memberships to the CIPC
- 3 complimentary registrations to the CIPC conference
- Acknowledgement and url posting on www.privateclientcouncil.com
- Company logo in conference program

PROGRAM BOOK or NAME BADGES – \$5,000 (2 available)

- Full page ad space in program book (program book sponsorship only)
- 3 Individual Memberships to the CIPC
- 3 complimentary registrations to the CIPC conference
- Acknowledgement and url posting on www.privateclientcouncil.com
- Prominent company logo placement in conference program book.
- Exclusive company logo placement on name badges or lanyards (name badge sponsorship only)

POWER CHARGING STATION – \$3,000 (2 available)

- Exclusive sponsor of the CIPC Conference Power Charging Station
- Company Name/Logo on power charging station signage
- 4 Individual Memberships to the CIPC
- 3 complimentary registrations to the CIPC conference
- Acknowledgement and url posting on www.privateclientcouncil.com
- Company logo in conference program

NETWORKING BREAKS – \$2,500 (2 available)

- Exclusive sponsorship of the networking beverage and refreshment breaks (catering included)
- On-site signage during networking breaks
- 3 Individual Memberships to the CIPC
- 2 complimentary registrations to the CIPC conference
- Company logo in conference program

For more information regarding sponsorship opportunities, please
contact us at cipc@marketscout.com or 972.934.4264.



Exhibitor Opportunities

MarketScout founded the Council for Insuring Private Clients (CIPC) in cooperation with The National Alliance for Insurance Education & Research and AIG. CIPC focuses on implementing best practices and risk management techniques for insuring the personal assets of private clients.

The CIPC's mission is to provide a venue where agents and insurers may collaborate on how to better serve their private clients. Insuring wealthy individuals is a unique, specialty area of the insurance industry and until now, there wasn't a forum for sharing ideas and perfecting skills.

Exhibiting at the 2020 CIPC Conference will be a valuable opportunity to be in front of a select group of high net worth insurance professionals.

EXHIBIT SPACE – \$1,950

- 1 6-foot draped table
- 2 side chairs
- 1 wastebasket
- 1 complimentary registration to the CIPC conference
- Identification sign with your company name and booth number
- Fifty-word company listing (provided by your company) will be included in the conference program distributed to all attendees
- Attendee contact information in an Excel spreadsheet
- Company listing will be included in all event related promotion and advertising, when applicable

Please Note:

Information on set-up and tear-down hours for booths will be provided at a later date.

Reserve today, exhibit booth spaces are limited!



Sponsorship/Exhibitor Agreement & Selection Form - Part I

Thank you for participating in the 2020 CIPC Conference! MarketScout will send confirmation when processed with specific sponsorship benefits.

Please check all that apply:

<input type="checkbox"/>	Platinum Sponsor - \$10,000	<input type="checkbox"/>	Keynote Speaker - \$5,000
<input type="checkbox"/>	Gold Sponsor - \$5,000	<input type="checkbox"/>	Program Book/Name Badge - \$5,000
<input type="checkbox"/>	Silver Sponsor - \$2,500	<input type="checkbox"/>	Networking Breaks - \$2,500
<input type="checkbox"/>	Bronze Sponsor - \$1,000	<input type="checkbox"/>	Exhibitor Booth - \$1,950

Additional Attendee Registration - \$395/person
(Optional)

\$ _____

Grand Total Due

\$ _____

Please make checks payable to MarketScout.

I hereby make application of the above for the 2020 CIPC Conference.

Company Name: _____

Contact Name: _____ Title/Position: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

E-mail: _____ Website URL: _____

(PLEASE CONTINUE TO SPONSORSHIP/EXHIBITOR AGREEMENT & SELECTION FORM - PART II)



Sponsorship/Exhibitor Agreement & Selection Form - Part II

Method of Payment

American Express MasterCard Visa Check # _____
Credit Card #: _____ Exp. Date (MM/YY): _____ CVC #: _____
Credit Card Billing Address: _____
City: _____ State: _____ Zip: _____
Name on Card (Please Print): _____
Signature (Required): _____ Date: _____

Attendee Registration Information

First Name: _____ Last Name: _____
Badge Name (if different from above): _____
Title/Position: _____ E-mail: _____
Phone: _____ Fax: _____
Mailing Address: _____
City: _____ State: _____ Zip: _____

Additional Attendee Registration

First Name: _____ Last Name: _____
Badge Name (if different from above): _____
Title/Position: _____ E-mail: _____
Phone: _____ Fax: _____
Mailing Address: _____
City: _____ State: _____ Zip: _____

Please send completed Sponsorship Agreement & Selection Forms Part I & II along with payment. Confirmations will be sent once approved. Sponsorships and exhibit booths are assigned on a first-come, first-served basis and are non-refundable.

Check Payments: *(payable to MarketScout)*
Mail to: MarketScout/Diahann Doyen
12700 Park Central Drive, Suite 510 Dallas, TX 75251

Credit Card Payments:
Return with form to cipc@marketscout.com or fax at 972-934-4299
There is a 3% processing fee for all credit card payments



CIPC Membership





Membership Information

CIPC CORPORATE MEMBERSHIP – \$5,000

CIPC Corporate Members are identified as supporting sponsors of the CIPC's efforts to improve education, networking, market access and professionalism in the practice of insuring private clients. Memberships are available for \$5,000 per year and provides access to all active agents in the firm.

Benefits of joining the CIPC as a Corporate Member:

- Recognition for your support for education, advocacy and networking in the private client business
- Affirmation of your desire to establish best practices for private client business
- Participation in executive panels on industry issues
- Opportunity to chair a specific service, industry or coverage group
- Direct contact between agency and insurer partners
- Access to agents and insurers specializing in the Private Client sector
- Consultation for building non admitted facilities
- Introduction to new market facilities
- Platform for locating agencies across the U.S. who can assist with servicing the business or producing new accounts
- Support in locating new producers, account representatives and marketing personnel
- Networking with individuals and companies interested in the high net worth space
- Connections with life and estate planning specialists and insurers
- Postings as industry expert for press inquiries
- Onsite consulting and training workshops
- Exclusive Lloyd's of London underwriting facility
- Complimentary Silver Sponsorship at the CIPC Conference, including:
 - 3 individual memberships to the CIPC
 - 2 complimentary registrations to the annual CIPC Conference
 - Acknowledgement and link on www.privateclientcouncil.com
 - Company name/logo in program, on-site event signage, and general sessions



Membership Information

MGA/WHOLESALE MEMBERSHIP – \$2,500

Memberships are available for \$2,500 per year and provides access to all active agents in the firm.

Benefits of joining the CIPC as a MGA/Wholesaler:

- CIPC individual memberships for the agency's insurance professionals (unlimited)
- Recognition for your support for education, advocacy and networking in the private client business
- Affirmation of your desire to establish best practices for private client business
- Networking with individuals and companies interested in the private client services space
- Reduced rates for attendance at all CIPC functions
- Networking with both admitted and non-admitted underwriters
- Two complimentary registration to attend the annual CIPC Conference (\$990 value)
- Opportunity to better understand retail agent challenges
- Continuing education on coverage, risk management and loss control for private clients
- Advanced notice of the Certified Personal Risk Manager (CPRM™) course curriculum and schedule





Membership Information

RETAIL AGENCY MEMBERSHIP – \$500

Memberships are available for \$500 per year and provides access to all active agents in the firm.

Benefits of joining the CIPC as a Retail Agency:

- CIPC individual memberships for the agency's insurance professionals (unlimited)
- Access to both admitted and non admitted private client markets
- Exclusive Lloyd's of London underwriting facility
- Introductions to other private client professionals
- CIPC will serve as liaison to new markets and insurance companies
- Reduced rates for attendance at all CIPC functions
- 1 complimentary registration to attend the annual CIPC Conference (\$495 value)
- Introduction to Lloyd's Coverholder and MGA market
- Continuing education on coverage, risk management and loss control for private clients
- Advanced notice of the Certified Personal Risk Manager (CPRM™) course curriculum and schedule



Membership Information

INDIVIDUAL MEMBERSHIP – \$295

Individual agent memberships are available for \$295 per year to insurance professionals who specialize in insuring private clients.

Benefits of joining the CIPC as a Retail Agent:

- Access to both admitted and non admitted private client markets
- Exclusive Lloyd's of London underwriting facility
- Introduction to other private client professionals
- CIPC will serve as liaison to new markets and insurance companies
- Reduced rates for attendance at all CIPC functions
- Continuing education on coverage, risk management and loss control for private clients
- Advance notice of the Certified Personal Risk Manager (CPRM) course curriculum and schedule

CIPC

2020

Membership Payment Form - Part I

Please check all that apply:

<input type="checkbox"/>	Corporate Membership -\$5,000	<input type="checkbox"/>	
<input type="checkbox"/>	MGA/Wholesaler Membership -\$2,500	<input type="checkbox"/>	
<input type="checkbox"/>	Retail Agency Membership -\$500	<input type="checkbox"/>	
<input type="checkbox"/>	Individual Membership - \$295	<input type="checkbox"/>	

Grand Total Due

\$ _____

Please make checks payable to MarketScout.

I hereby agree to apply for the above 2020 CIPC Membership.

Company Name: _____

Contact Name: _____ Title/Position: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

E-mail: _____ Website URL: _____

(MEMBERSHIP PAYMENT FORM - PART I)

CIPC

2020

Membership Payment Form - Part II

Method of Payment

American Express

MasterCard

Visa

Check # _____

Credit Card #: _____ Exp. Date (MM/YY): _____ CVC #: _____

Credit Card Billing Address: _____

City: _____ State: _____ Zip: _____

Name on Card (Please Print): _____

Signature (Required): _____ Date: _____

Check Payments: *(payable to MarketScout)*

Mail to: MarketScout/Diahann Doyen
12700 Park Central Drive, Suite 510 Dallas, TX 75251

Credit Card Payments:

Return with form to cipc@marketscout.com or fax at 972-934-4299

There is a 3% processing fee for all credit card payments



Questions regarding the CIPC?

Contact Us:
cipc@marketscout.com
972.934.4264

