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PARKER | SMITH | FEEK  
**University**

**Educational Series**

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PARKER | SMITH | FEEK

**Commercial Insurance**

**Employee Benefits**

**Personal Insurance**

**Risk Management**

**Surety**





PARKER | SMITH | FEEK

## About

Parker, Smith & Feek is a nationally recognized, full service insurance broker and employee benefits consulting firm. Founded in 1937 in Seattle, Washington, Parker, Smith & Feek has grown to be one of the largest risk management and insurance brokerage firms in the United States. From our offices in Bellevue, Washington; Anchorage, Alaska; and Portland, Oregon, Parker, Smith & Feek provides risk management consulting services, business and personal insurance, employee benefits consulting, and surety bonds. We represent the leading insurance companies both in the United States and abroad.

## Contact

If you have questions about the Parker, Smith & Feek University classes, or would like to reserve your spot in an upcoming class, please contact:

**Sara Bowyer**  
**425.709.3712**  
**skbowyer@psfinc.com**

We have limited space, and spots tend to fill up quickly. Not all classes are offered at all locations. If you have a large group, ask us about a personal class tailored for your company's needs!

## 2019 Class Offerings

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# Educational Series

## Insurance 101 - Property & Casualty Basics

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THURSDAY, MARCH 21ST | 8:30 am - 12:00 pm

*Seattle, WA at The World Trade Center*

THURSDAY, SEPTEMBER 5TH | 8:30 am – 12:00 pm

*Tacoma, WA (Venue TBD)*

THURSDAY, JULY 25TH | 8:30 am – 12:00 pm

*Anchorage, AK Office*

THURSDAY, OCTOBER 3RD | 8:30 am – 12:00 pm

*Bellevue, WA Headquarters*



### WHAT YOU WILL LEARN

This course is intended for those individuals who have little or no insurance experience and knowledge. It is designed to familiarize the non-insurance professional with basic concepts of traditional insurance coverage as well as key terms and principles. The major coverages dealt with are property insurance, general liability insurance, auto insurance, umbrella/excess liability, and others. Areas of importance such as named insureds, coverage forms, policy exclusions, conditions and limitations, along with coverage enhancements and solutions for common insurance issues.

The attendee will leave this seminar with a basic understanding of standard insurance coverages including their function and those areas of coverage which are often confusing or misunderstood.



### PRESENTER: SHELLEY CARDIEL

Read Shelley's bio in the back of this brochure.

## Contracts & Certificate Review 101 Certificate & Endorsements 201

For full day sessions, lunch will be served between classes.

WEDNESDAY, FEBRUARY 13TH

*Bellevue, WA Headquarters*

Contracts & Certificate Review 101 | 8:30 am – 12:00 pm

THURSDAY, FEBRUARY 14TH

*Bellevue, WA Headquarters*

Certificate & Endorsements 201 | 8:30 am – 12:00 pm

THURSDAY, MARCH 28TH

*Portland, OR at Multnomah Athletic Club*

Contracts & Certificate Review 101 | 8:30 am – 12:00 pm

Certificate & Endorsements 201 | 1:00 pm – 4:00 pm

THURSDAY, JUNE 6TH

*Seattle, WA at The World Trade Center*

Contracts & Certificate Review 101 | 8:30 am – 12:00 pm

Certificate & Endorsements 201 | 1:00 pm – 4:00 pm

THURSDAY, AUGUST 15TH

*Bellevue, WA Headquarters*

Contracts & Certificate Review 101 | 8:30 am – 12:00 pm

Certificate & Endorsements 201 | 1:00 pm – 4:00 pm

THURSDAY, SEPTEMBER 26TH

*Tacoma, WA (Venue TBD)*

Contracts & Certificate Review 101 | 8:30 am – 12:00 pm

Certificate & Endorsements 201 | 1:00 pm – 4:00 pm

THURSDAY, OCTOBER 17TH

*Anchorage, AK Office*

Certificate & Endorsements 201 | 8:30 am – 12:00 pm

THURSDAY, NOVEMBER 14TH

*Bellevue, WA Headquarters*

Contracts & Certificate Review 101 | 8:30 am – 12:00 pm

Certificate & Endorsements 201 | 1:00 pm – 4:00 pm



### WHAT YOU WILL LEARN

**Contracts & Certificate Review 101** — This class is designed for those who have primary responsibility for securing and monitoring insurance coverages and certificates of insurance. Topics will focus on negotiating contracts and contractual requirements in leases and contracts and the various insurance coverages required to comply. This will include discussion about certificates of insurance - what they are, what they do, and how to read them.

**Certificate & Endorsements 201** — This class is designed for businesses that hire contractors and/or work in the construction industry. It will benefit those responsible for reviewing certificates and endorsements. We will break down Additional Insured, Primary/Non-Contributory, and Waiver of Subrogation language within policy forms and endorsements attached to the Acord Certificate of Liability Insurance. You will learn to identify and differentiate between the various coverage triggers found in Additional Insured endorsements as well as identifying the coverage limitations and exclusions contained therein.

You will come away with a comprehensive checklist and forms library that can be utilized to support you in the process of compliance and monitoring certificates of insurance. Here are a couple of testimonials for this class:

“I would highly recommend anyone working with insurance on a regular basis attend the Parker, Smith & Feek courses, you will be very glad you did. Knowledge makes each of us more confident and our work more enjoyable, the more we know the better. I truly would not be where I am today without the guidance from Parker, Smith & Feek.” - Deborah Noel, Lydig

“The Certificate and Endorsements 201 Class instructed by Angela Samarel of Parker, Smith & Feek greatly advanced my understanding and knowledge of endorsements specifically relating to commercial subcontractors. I highly recommend this class to all insurance reviewers!” - Pam Westphal BNBuilders



### PRESENTERS: SHELLEY CARDIEL, ANGELA SAMAREL

Read their bios in the back of this brochure.

# Educational Series

## Claims 101 - Demystifying The Claims Process

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THURSDAY, APRIL 18TH | 8:30 – 12:00 pm

*Bellevue, WA Headquarters*

THURSDAY, JULY 18TH | 8:30 – 12:00 pm

*Portland, OR at Multnomah Athletic Club*



### WHAT YOU WILL LEARN

This class intended for those individuals who want a greater understanding of the claims process. Have you ever wondered if the ads about insurance company adjusters are really true? Or why some claims are paid and others are not? Maybe you've had a personal experience with a claim and you still don't understand what the adjuster did. This course will help to unmask the claims process and provide the attendee with a basic understanding of common claims terms, concepts and procedures used by the insurance company from the time they are notified of a claim to its resolution.



### PRESENTER: ED RHONE

Read Ed's bio in the back of this brochure.

## **Workers' Compensation 101 - Solving the Mysteries of Workers' Compensation**

WEDNESDAY, JANUARY 23RD | 8:30 – 11:30 am

*Anchorage, AK Office*

THURSDAY, SEPTEMBER 12TH | 8:30 – 11:30 am

*Bellevue, WA Headquarters*

THURSDAY, JUNE 27TH | 8:30 – 11:30 am

*Portland, OR at Multnomah Athletic Club*



### **WHAT YOU WILL LEARN**

This class will provide a brief overview of the history of workers' compensation insurance, as well as the different types of coverage available to protect employees who are injured on the job. We'll start with a high level overview of the experience modification process that will set the stage for our review of the claim management process, including an explanation of the available benefits. Finally we'll wrap things up by highlighting helpful resources to assist employers with containing costs and expediting claim resolution.



**PRESENTERS: SHAWN HJORT, KEVIN SAYLER, KRISTY CLARK, LYNNE SEVILLE,  
BRIAN ZEMATIS**

Read their bios in the back of this brochure.

# Educational Series

## Construction & Project-Related Insurance 101

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TUESDAY, FEBRUARY 26TH | 8:30 am – 12:00 pm

*Bellevue, WA Headquarters*

THURSDAY, OCTOBER 17TH | 8:30 am – 12:00 pm

*Tacoma, WA (Venue TBD)*

THURSDAY, MAY 23RD | 8:30 am - 12:00 pm

*Portland, OR at Multnomah Athletic Club*

THURSDAY, NOVEMBER 7TH | 8:30 am – 12:00 pm

*Bellevue, WA Headquarters*



### WHAT YOU WILL LEARN

While initially designed for contractors and subcontractors, this course benefits those involved with construction activities and projects, including real estate developers. The course foundation is built upon a basic knowledge of insurance and coverages essential to the construction industry, but also includes sections on contractual requirements and claims process that apply to construction and real estate concerns alike. Project-related insurance topics include builder's risk, owner/contractor controlled insurance programs (OCIP's or CCIP's – often referred to as wrap ups) and owner's and contractor's protective (OCP) coverage. If you are responsible for construction contracts, construction site supervision, project development, and/or the overall management of related insurance programs, this course is for you.



### PRESENTERS: WALT ISLER, JIM SORTE

Read their bios in the back of this brochure.



## Presenter Bios



### SHELLEY CARDIEL

Shelley is a Client Experience Manager in our Commercial Department and a Principal of our firm. She plays a leadership role in our quality control, procedures, and training programs, and she supervises PS&F's commercial account team members. In addition to her leadership responsibilities, Shelley manages all administrative aspects of the insurance program for some of our largest, most high profile, and technically complex clients. Shelley specializes in Construction and Real Estate accounts, and has extensive experience with Contractor Controlled Insurance Program (CCIP) and Owner Controlled Insurance Program (OCIP) management and administration. She is an expert in contract analysis for insurance purposes and conducts training seminars on all aspects of contract management, including review and proper handling of certificates of insurance. Shelley has 41 years experience in the insurance industry, 34 of those at Parker, Smith & Feek.



### ANGELA SAMAREL

Angela is a Vice President and Client Executive in our Commercial Department. She manages all administrative aspects of the insurance program for some of our largest, most high profile, and technically complex clients, specializing in the construction industry. She is a primary contact for client risk managers and senior level management, and works directly with them in all aspects of their insurance program needs, providing proactive strategies for placement of coverage, development of policy contracts, and solutions to satisfy their continuing insurance requirements. Angela has more than 25 years of experience in the insurance industry, and has been with Parker, Smith & Feek since 1999.



### ED RHONE

Ed is the Manager of PS&F's Claims Department. He is our clients' advocate in negotiations between all parties to a claim: insured claimants, insurance company adjusters, and attorneys. He has extensive experience in a broad spectrum of property and casualty losses, and has helped clients manage catastrophic losses caused by fire, chemical spills, industrial accidents, and natural disasters. Ed is adept in evaluating how insurance coverages will respond to specific loss scenarios. Ed has nearly 31 years of claims management experience, 14 at Parker, Smith & Feek. He holds the Chartered Property and Casualty Underwriter (CPCU) and Associate in Claims (AIC) professional designations. Ed received his B.A. in Business Administration from Western Washington University.

## Presenter Bios (continued)

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### SHAWN HJORT

Shawn has over 25 years of property and casualty claim management experience, with expertise in the workers' compensation arena. She has assisted clients in a variety of industries, with specialization in Health Care, Manufacturing, Transportation, Food Service, Retail, Public Entities/Municipalities and Technology.



### KEVIN SAYLER

As our Risk Control Specialist, Kevin works with our account teams and clients to provide risk prevention and safety control practices in the workers' compensation, general liability, property, and fleet exposure areas tailored to individual clients' exposures and operations. He has experience working with many industries including food processing, professional offices, construction, metal fabrication, surface mining, and extensive experience in shipyards. Kevin's background in industrial hygiene gives him a focus on prevention of illnesses and injuries from exposures in the work environment. Through this broad base of experience, he is able to help find alternatives to hazardous conditions that reduce risk but also work within the client's operations. Kevin joined Parker, Smith & Feek in 2016. He has been a Certified Industrial Hygienist (CIH) since 2005 and completed the Marshall & Swift Commercial Cost Approach Certification. He holds a B.S. degree in biology from Walla Walla College (now Walla Walla University) and a master's degree in public health from Loma Linda University.



### KRISTY CLARK

Kristy is our Health and Wellness Management Executive. She collaborates with employee benefit clients to explore, strategize, develop, implement, and nurture programs of health promotion and awareness for employees. Our health and productivity consulting covers a broad range of health and lifestyle issues with the intended result of creating a healthier workforce. Wellness programs that reduce barriers to healthy living can decrease the incidence of chronic disease, improve employee morale, invoke synergies within peer groups for participation, and may reduce costs. Kristy has over 20 years of insurance industry experience in benefit account management with fully insured and self-funded employers in carrier, TPA, and brokerage settings. She holds a B.A. in political science from the University of Colorado, Boulder, and a master's in public health (MPH) from Case Western Reserve University School of Medicine (2014).



### WALT ISLER

Walt is an Account Executive in our Commercial Department, a Principal of our firm, and a member of our Construction Practice Group. He specializes in the design and implementation of insurance programs for both general and specialty contractors. Walt has over 20 years experience in the insurance industry and holds the Chartered Property Casualty Underwriter (CPCU) and Construction Risk Insurance Specialist (CRIS) professional designations. He is a graduate of the United States Military Academy at West Point, New York, and served five years in the United States Army.

## Presenter Bios *(continued)*

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### **JIM SORTE**

Jim is a Claims Executive, and a Vice President of the firm. He has held a variety of positions in his claims career. He was an adjuster with an insurance company, an independent adjusting firm, and the State of Oregon Risk Management Department. His experience as a broker Claims Consultant/Executive includes 14 years with a national broker, and over 8 years with Parker, Smith & Feek. Jim graduated from Oregon State University with a degree in Business Administration and holds the Associate of Claims (AIC) and Associate of Risk Management (ARM) professional designations.



### **LYNNE SEVILLE**

Lynne is an Account Executive in our Anchorage office and a Principal of the firm. Lynne serves Alaska-based contractors, financial institutions, social services organizations, and utilities. In addition to insurance program design and placement, Lynne specializes in injury and loss prevention management strategies, and claims management programs and implementation for clients. Lynne joined Parker Smith & Feek, Inc. in 2006. She has over twenty-five years of industry experience, including thirteen years with one of the world's largest international insurance brokers. Lynne is active in professional associations and has received several awards in recognition of her professional accomplishments and philanthropic activities. Lynne earned a B.S. in Industrial Engineering, Business, and Pre-Law from Arizona State University.



### **BRIAN ZEMATIS**

Brian is an Associate Claims Executive in our Commercial Department, responsible for managing clients' claims. He works for client interests with the insurance companies, and is a resource for them when facing a claim. He helps clients understand the nuances of their coverage and navigates the complex and ambiguous claim process. Brian's background is rooted in workers' compensation and branches into the various commercial lines of coverage. He has experience with a wide range of industries, including construction, retail, non-profits, and finance. Brian was a workers' compensation officer with the State of Alaska prior to joining Parker, Smith & Feek. In this role, he adjudicated prehearings in litigated workers' compensation cases and provided the public with guidance in navigating the workers' compensation process. He joined Parker, Smith & Feek in the spring of 2018.



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