

Thursday, November 8th

4:00 - 5:00 p.m.	New Client Q&A Meeting
6:00 - 8:00 p.m.	Welcome Cocktail Reception

Friday, November 9th

8:00 - 9:00 a.m.	Breakfast	
9:00 - 9:15 a.m.	Welcome Remarks	Mark Sims, Captive Alternatives
9:15 - 9:45 a.m.	Keynote Presentation: The Future of Captives	Daniel Towle, Captive Insurance Company and Association
9:45 - 10:15 a.m.	New Developments in Puerto Rico	Ralph Rexach, Rexach & Picó
10:15 - 10:45 a.m.	Morgan Stanley	Michael Brunner, Morgan Stanley
10:45 - 11:00 a.m.	Break	
11:00 - 11:30 a.m.	The Four Legged Stool: An Introduction to Risk Transfer, Risk Distribution, Insurable Risk and Insurance	Robert Walling, Pinnacle Actuarial
11:30 a.m. - 12:00 p.m.	Puerto Rico International Insurance Center: Background, Trends and Expectations	Ruben Gely, International Insurance Center Puerto Rico
12:00 - 12:30 p.m.	Reserve Mechanical Case	Mark Sims and David Kirkup, Captive Alternatives
12:30 - 1:00 p.m.	A Closer Look at Tax Issues and the CapAlt Model	Jeff Korenblatt, Reed Smith
1:00 - 2:00 p.m.	Lunch	
7:00 - 10:00 p.m.	Dinner	

Saturday, November 10

8:00 - 9:00 a.m.	Breakfast	
9:00 - 9:15 a.m.	Madison Claims Overview: Year in Review	Rex Ramos, Western Litigation and Robert Zack, Captive Alternatives
9:15 - 9:45 a.m.	Welcome to Puerto Rico	Luis G. Rivera Marin, Secretary of State of Puerto Rico
9:45 - 10:15 a.m.	Maximizing Captive Ownership for Tax, Asset Protection and Family Planning	John Parise and Michael J. Parise, Esq., Copper Beech Financial Group
10:15 - 10:45 a.m.	Captives Politics and Policy, Straight from DC	Ryan Work, Self-Insurance Institute of America
10:45 - 11:00 a.m.	Break	
11:00 - 11:30 a.m.	Legislative Update Panel - PATH Act, Form 8886, Avrahami Decision	Ryan Work, Daniel Towle, Rob Walling, Mark Burns, and Chase Herring
11:30 am - 12:00 pm	Closing Remarks	Captive Alternatives
1:00 - 2:00 pm	Lunch	
2:00 p.m.	Exploring Tax Efficient Exit Planning for Your Captive (Cooper Beech-sponsored Optional Breakout Session)	John Parise and Michael J. Parise, Esq., Copper Beech