

# 2021 INSURANCE ROUNDTABLE INSURANCE & RISK MANAGEMENT IN THE TIME OF COVID-19 AND BEYOND

*Sponsored by AHT Insurance, HUB International Limited, and Marsh McLennan*

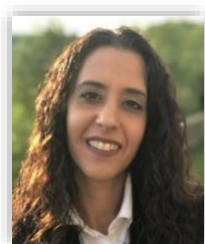
## PRESENTERS BIOGRAPHIES



### **Mark S. Beasley**

KPMG Professor of Accounting and Director of Enterprise Risk Management Initiative  
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Mark S. Beasley is KPMG Professor of Accounting and Director of North Carolina State's Enterprise Risk Management (ERM) Initiative, which provides thought leadership about ERM practices and their integration with strategy and corporate governance. He served over seven years on the COSO board and served on COSO's Advisory Council that helped develop the 2004 *Enterprise Risk Management – Integrated Framework* and its 2017 revision. He currently is serving on the United Nations' Internal Control Advisory Group that is advising the UN Controller on COSO-based best practices related to internal controls, and he has assisted the UN with training on ERM. Mark is a frequent speaker at national and international conferences and frequently works with boards of directors and senior executives on risk oversight issues. Mark has authored over 100 research articles and business publications, and he is the author of a leading auditing textbook. Prior to joining NC State, Mark served as a Technical Manager in the Audit and Attest Division of the AICPA and as an Audit Manager in the Nashville, Tennessee office of Ernst & Young. He received a BS in accounting from Auburn University and a Ph.D. from Michigan State University.



### **Moojan Behziz**

Senior Advisor Treasury & Insurance  
Bill & Melinda Gates Foundation  
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Moojan Behziz is responsible for Treasury at the Bill & Melinda Gates Foundation where she works primarily on global banking and insurance. She started her career at PWC, responsible for tax preparation of tax-exempt organizations. Following her work with PWC, Moojan spent 13 years at Amgen, Inc. and held positions of increasing responsibility mainly within global treasury, which included cash management, capital planning, interest rate and foreign exchange risk management, and corporate insurance. Prior to joining the Bill & Melinda Gates Foundation, Moojan was the Assistant Treasurer for Wesco Aircraft, responsible for M&A treasury integration, cash operations, and debt restructuring. She earned her M.B.A. in Financial Planning in 2009 from California Lutheran University and holds dual Bachelor of Science degrees from George Mason University in Accounting and Management Information Systems/Decision Sciences. Moojan resides in Sammamish with her husband and two children.

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## **Stephen Chiu**

Director, Global Treasury  
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Stephen Chiu is the Director of Global Treasury at World Vision International, leading strategic initiatives that enhance treasury, insurance, and risk management across the global development sector. Previously at World Vision, Stephen held roles as Senior Strategic Advisor for Public-Private Partnerships, designing global collaborations between corporations, governments, and NGOs; and Senior Finance Officer, overseeing financial management of 175 projects in 36 countries. Prior to World Vision, he served in Corporate Strategy at Fannie Mae; Private Client Services at Lehman Brothers; and Management Consulting at PricewaterhouseCoopers and Perot Systems. Stephen received an M.B.A. at U.C. Berkeley's Haas School of Business and an A.B. from Harvard College. He recently served on the Association for Financial Professionals' Conference Planning Task Force and Pinnacle Award Committee, and received his CTP designation in 2014.



## **Ashley Coles**

Director, Security Risks  
Price Forbes  
ashleycoles@priceforbes.com

Ashley Coles began his career as a Kidnap and Ransom Underwriter at Hiscox Guernsey focusing on Latin American Family Kidnap and Ransom Insurance. Latterly, Ashley specialized in Maritime Piracy programs at Hiscox before joining Jardine Lloyd Thompson in London as a Security Risks broker focusing on Emergency Evacuation and Security Risks in the Asia Pacific region. In 2014, Ashley was stationed in Hong Kong for 5 years, where he was responsible for opening the first dedicated Security Risks desk in Asia. Here his remit was to support clients in challenging environments across a range of insurance solutions including Emergency Evacuation, Kidnap and Ransom, High Risk Personal Accident, Cyber and Recall Risks. Following his return to the UK, Ashley joined Price Forbes as a Director in the Security Risks Practice where he assists clients from small and medium enterprises to blue chip Fortune 500 companies in constructing robust Security Risks coverages. His focus remains on Asia and up until recently was stationed in Malaysia. However, he continues to support the business globally. Ashley holds a Politics and French degree from the University of Bath.

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**Barbara Davey, CIC ARM CPCU**

Insurance and Financial Risk Manager  
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Barbara Davey began her tenure with the University of Notre Dame almost 25 years ago. In that capacity, Barb provides risk management and insurance expertise to the University and its constituents. Barb has achieved three designations in the insurance field, spoken at industry conferences, and served in various leadership roles within the University Risk Management and Insurance Association (URMIA).



**Elise M. Farnham, CPCU, ARM, AIM, CPIW**

President  
Illumine Consulting  
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Elise M. Farnham is an internationally acclaimed speaker, educator, author, and expert witness with over 45 years of experience in risk management and insurance as a P&C claim professional. She has held executive positions with Crawford & Co., GAB Robins N.A., The Harmonie Group, and Carson-Brooks. Currently she is a member of the CPCU Society, serving on the CPCU Consultants, Litigators, Educators & Witnesses Interest Group committee and is a past president of the Atlanta Chapter of CPCU. Elise is a member of the Insurance Professionals of Atlanta and past president of the International Association of Insurance Professionals (1998-1999). She has been recognized as the IAIP National Claim Professional of the Year, Insurance Woman of the Year three times by Insurance Professionals of Atlanta; and Instructor of the Year by the Atlanta Chapter of CPCU. Her articles have been published in numerous industry domestic and international trade journals.



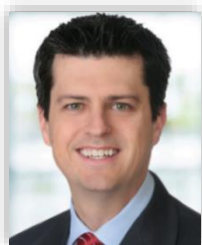
**Joe Gleason**

Global Risk Consultant  
AHT Insurance  
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With over 20 years of experience managing global operational risks, Joe Gleason brings a seasoned and practical approach to his role at AHT. Working with clients to identify and assess risks and then build and refine mitigation strategies, Joe's role is a key resource supporting clients in AHT's International Aid and Development Organization practice. Whether it is through reviewing and strengthening plans and procedures, delivering training on topics such as travel risk or critical incident response, or advising clients on current best practices within the community, Joe helps enable client operations in some of the world's most challenging environments. Prior to AHT, Joe spent 17 years directly managing global security and operations for an NGO with offices in over 60 countries, providing a practical, experienced foundation for his role advising clients. In a further commitment to the community, Joe serves on the board of the International NGO Safety and Security Association (INSSA).

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**Bill Hardin**

Vice President, Forensic Services  
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Bill Hardin has worked on over a thousand data incident/data breach cases along with numerous cases dealing with white-collar crime and enterprise risk management. He has handled all types of ransomware, data extortion, business email compromise, nation state attacks, malware outbreaks, insider threats, amongst other items. Many of his cases have been mentioned in The Wall Street Journal, Financial Times, Forbes, and Krebs on Security, amongst other publications. With a background in finance, operations, and software development, he brings valuable insights to clients from multiple dimensions. In addition to his forensic engagement assignments, Bill has served in numerous interim management roles for organizations experiencing disruption. He has assisted companies with various management consulting assignments pertaining to strategy, operations, and software implementations. Bill is a Certified Public Accountant (CPA)/CFF, Certified Fraud Examiner (CFE), and a certified Project Management Professional (PMP). He has spoken at numerous events on cybercrime, risk management, and strategy/operations consulting. He serves on the board for Legal Prep Charter Schools and is an adjunct professor at DePaul University in Chicago.



**Daniel J. Healy**

Partner  
Anderson Kill, LLP  
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Daniel J. Healy is a partner in Anderson Kill's Washington, D.C. office. He started his career with Anderson Kill over 20 years ago, served for five years as a Trial Attorney with the U.S. Department of Justice, Tax Division, and currently represents policyholders seeking insurance coverage. Dan co-chairs Anderson Kill's Cyber Insurance Recovery Practice Group and is a member of the firm's Technology, Media and Distributed Systems, and COVID Task Groups. Since 2018, Dan has been selected by his peers for inclusion in The Best Lawyers in America for Insurance Litigation and has been recognized by Super Lawyers for Insurance Coverage. In 2019, he was selected for inclusion in the American College of Coverage Counsel. While at the Department of Justice, he received numerous Outstanding Attorney awards and served as the E-Discovery Coordinator for the Tax Division.

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**Carolina Klint**

Managing Director, Risk Management Leader Continental Europe  
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Carolina Klint was appointed Risk Management Leader for Continental Europe in October 2020 and oversees Marsh's Risk Management teams in the region as they develop strategic solutions that support and enable Marsh's largest clients to navigate the global risk landscape. She also leads key initiatives around client centricity, innovation, and enhanced value propositions throughout the region. Carolina is a member of the Continental Europe Executive Committee. Carolina joined Marsh in 2017 as CEO of Marsh's Northwest Europe region, comprising Belgium, Luxembourg, Netherlands, and the Nordics. Before joining Marsh she held several senior positions with AIG, most recently as President of its U.S. South Zone, responsible for AIG's Commercial Business in 11 states. Carolina has held the position of Country CEO of AIG in Sweden and under her leadership, AIG was named Insurance Company of the Year at the 2013 Insurance Awards held by R&F, Sweden's leading insurance publication. Carolina speaks frequently about change management, risk, resilience, and the importance inclusive leadership as a keynote speaker, panelist, and guest lecturer. She serves as the official Marsh McLennan spokesperson for the World Economic Forum's Global Risks Report 2021. She has appeared on Swedish business weekly Veckans Affärer's list as one of "The 125 Most Powerful Women in Business" for three consecutive years. In December 2013 Carolina was named honoree for the Business Insurance magazine's Women to Watch and she is one of the co-authors of the book "Words of Wisdom from Women to Watch: Career Reflections from Leaders in the Commercial Insurance Industry" (Wiley 2016). She is a nonexecutive director on the board of Anticimex and serves on the board of the Business Insurance Foundation. Carolina is based in Stockholm, Sweden, and lives just north of the city with her husband and their son.



**Scott R. Konrad**

Senior Vice President & Not-for-Profit Practice Leader  
HUB International Northeast Limited  
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Scott Konrad leads global broker HUB International's vertically-integrated specialty practice that helps charitable organizations surmount their most pressing corporate risk, insurance, and human capital challenges. An award-winning insurance industry veteran whose resume has included leadership roles with global brokers Johnson & Higgins, Marsh, and Willis, and with the Episcopal Church's denominational insurance facility, Scott has devoted the past half of his 44-year career to advocating for nonprofit organizations. He is a graduate of Colgate University with professional accreditation in Risk Management for Churches & Schools from the University of Cambridge (UK), and is a frequent author and speaker on nonprofit risk management themes. Scott brings an 'insider' perspective to his work through his own servant leadership experience with a variety of nonprofit civic, religious, and professional organizations.

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**Jeffrey A. Kurz**

Managing Director, Captive Insurance Consulting  
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Jeffrey A. Kurz is the Managing Director of Captive Insurance Sales and Consulting for Artex Risk Solutions. He has over 25 years of experience in the area of alternative risk financing including work with captive insurance companies, segregated cell captive insurers, risk retention groups and self-insured trusts, with specific concentrations in higher education, construction, healthcare, real estate and large multinational company related risk. A Certified Public Accountant in inactive status, Jeff has provided consultation to a wide range of multinational clients on alternative risk issues including US federal, state and international taxation, accounting, and investment management as well as strategic planning and restructuring of captive insurance companies and legacy liability transactions. Prior to joining Artex, Jeff was the founder and CEO of Red Hook Risk Services, a captive insurance consulting firm in joint venture with Medical Protective, a Berkshire Hathaway Company. Jeff has served as a national captive insurance resource for large regional and international brokerages. His career includes eight years as a CPA in public accounting where he served as an insurance tax consultant, including service as part of the national insurance tax practice. He is a frequent speaker at events of the Vermont Captive Insurance Association, the Captive Insurance Companies Association, the World Offshore Conference, the Captive Insurance Council of the District of Columbia, the National Restaurant Association, and the Insurance Accounting and Systems Association, and has been published in National Underwriter, ART and Insurance Review and Captive Review. He is a graduate of The Ohio State University Fisher College of Business and a veteran of the United States Marine Corps.



**Dr. Finn Morgan**

Chief Medical Officer  
Healix International  
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Dr. Finn Morgan has been working full time in international medical assistance for 18 years. He joined Healix International as a Medical Officer in 2003, before being promoted to Chief Medical Officer in 2010. Healix is one of the world's leading international medical assistance organisations, providing medical services to corporate and insurance clients all over the globe. They have been the medical assistance partner of the British Government for the past eleven years. During the COVID-19 pandemic, Dr. Morgan has been focused on efforts to maintain a functioning international medical assistance service in the face of obstacles never before encountered. He has been closely involved in the pandemic response of the British Diplomatic Service. Prior to joining Healix, Dr Morgan worked for nine years as a surgeon in London and undertook research in the field of xenotransplantation.

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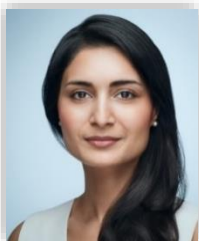
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## **Kathryn Powers**

Head of Global Treasury  
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Kathryn Powers is the Global Treasurer of World Vision International (WVI), a Christian relief, development, and advocacy organization with revenues of \$2.7 billion and operations in nearly 100 countries. Kathryn joined WVI in 2006 and has led the organization through the process of globalizing treasury and insurance including the development of services, policies and standards as well as implementing and leveraging technology. Before joining WVI, Kathryn held numerous treasury positions at AT&T, Lucent Technologies, and EDS. Kathryn holds an MBA from the University of Chicago. Prior to graduate school, Kathryn served in the financial and administrative management of rural “bush” health clinics and medical facility in Blantyre, Malawi.



## **Saadia Zahidi**

Managing Director, Centre for the New Economy and Society  
World Economic Forum  
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Saadia Zahidi and her teams work with leaders from business, government, civil society and academia to understand and shape the new economy, advance competitiveness, drive social mobility and inclusion, close skills gaps, prepare for the future of work, and foster gender equality and diversity. Saadia founded and co-authors the Forum's Future of Jobs Report, Global Gender Gap Report, and Human Capital Report. Her book, *Fifty Million Rising*, charts the rise of working women in the Muslim world and was longlisted for the FT/McKinsey Business Book of the Year 2018. She has been selected as one of BBC's 100 Women and won the inaugural FT/McKinsey Bracken Bower Prize for prospective authors under 35. She holds a BA in Economics from Smith College, an MPhil in International Economics from the Graduate Institute of Geneva, and an MPA from the Harvard Kennedy School. Her interests include the future of work, the impact of technology on employment, education and skills, income inequality and using big data for public good.