

Surviving Troubled Waters

Please note: Handouts for the sessions will be posted when available. Please keep in mind that not all speakers provide handouts.

8:30 - 9:30 am

(GLASS ROOM)

PRESIDENTS' BREAKFAST:

THE RIGHT CREW ON BOARD: A CASE STUDY

This event is exclusively for presidents. You MUST select this registration option if you wish to attend. Act fast and register today! Seating is limited!

Speakers: Ari J. Hoffman, Esq. – Cohen & Wolf, P.C.
Frank Pingelski – Toohar Ferraris Insurance Group
Nicole Skaro – First Citizens Bank
Steve Lang & David Kent – The Falcon Group

Moderator: Michael Famiglietti, CMCA – CM Property Management

Our panel will offer a case study to illustrate the cost of not hiring an expert. Having a good crew of experts you can rely on to ensure you are charting a safe course is key to preventing shipwrecks and other disasters. Learn how you can better utilize your crew of professionals.

Sponsored by: CM Property Management

8:30 - 9:45 am

(WAGON ROOM)

MANAGERS' BREAKFAST:

SANITY SURVIVAL STRATEGIES

This event is exclusively for state registered Community Association Managers (CAMs). Pre-registration for this session is required.

Speakers: Jessica Towles-Gottschalk, AMS, PCAM – Sterling Ranch CAB
Moderator: Kristie Leff, Esq. – Bender, Anderson & Barba, P.C.

Ever feel like you are just bailing water out of a distressed boat? How can an annual calendar; greater transparency through the financials; and more honest assessments about the physical state of your communities help you be proactive rather than reactive? Our Nationally renowned speaker will discuss strategies to help keep you from drowning.

Sponsored by: Bender, Anderson & Barba, P.C.

8:30 - 10:15 am EXHIBIT HALL OPENS • REGISTRATION AND CONTINENTAL BREAKFAST (COFFEE & DANISH)

10:15 - 11:00 am • General Session I

A: INSURANCE: SAILING THROUGH INCREASES AND RENEWALS

(GLASS ROOM)

Speakers: Doug Henken – CAU of America
Chas Ryan, Esq. – Pilicy & Ryan, P.C.

Moderator: Carrie Mott – Bouvier Insurance

The waters have been quite choppy in the sea of insurance lately. Is your community doing all that it can to be marketable to insurance carriers? Discover strategies for staving off large increases including loss control directives, etc. Determine when it is appropriate to call your agent. And more!

Sponsored by: Bouvier Insurance

B: HOMEOWNER PERCEPTIONS: CRUISE SHIP OR ROWING BOAT?

(WAGON ROOM)

Speakers: Bill Ward, Esq., CCAL – Ackerly Ward & McKirdy LLC
Dan Levine, CPA – Tomasetti, Kulas & Company, P.C.
Jessica Towles-Gottschalk, AMS, PCAM – Sterling Ranch CAB

Moderator: Erin Kremser – First Citizens Bank

Does it sometimes seem as though unit owners see the association as a cruise ship where is everything is taken care of? Or, do they understand that it is a rowing shell where everyone needs to row together? How do you encourage owners to understand the challenges facing the community and why they need to be part of the solution, e.g. realistic budgeting; honest communication about the need for increased fees; the realities of affordability for some homeowners, why delaying projects now will likely mean more expense later, etc.

Sponsored by: First Citizens Bank

11:00 - 11:45 AM • EXHIBIT HALL

11:45 - 12:30 pm • General Session II

A: BATTEN DOWN THE HATCHES: RESERVES & CAPITAL SPENDING

(GLASS ROOM)

Speakers: Michelle Baldry – Reserve Advisors LLC
Eric Churchill – Scherneck Property Services, Inc.

Moderator: Greg Zajac – Building Renewal, LLC

Are you taking on water? Is it too late to jump? Decades old communities may have years of deferred maintenance that can no longer be ignored or delayed further. Have you looked closely at items like: sewer pipes, catch basins, wiring, general plumbing, footing drains, gutters, etc. that may have missed close review in the past? Does your community have a reserve study? Is it up to date? Has your association followed the recommendations? After Surfside, states are increasingly requiring more robust reserve planning and funding. Will Connecticut be next?

Sponsored by: CM Property Management

B: LEGAL HAZARD BUOY – BERMUDA TRIANGLE

(WAGON ROOM)

Speakers: Kasey Burchman, Esq. – Feldman, Perlstein & Greene, LLC
Gregory McCracken, Esq. – Jacobs, Walker, Rice & Barry, LLC
Christopher K. Leonard – Collins Hannafin, PC

Moderator: Benjamin Whittemore, CMCA – Paladin Property Management

Our knowledgeable speakers will focus on the three main legal trouble hazards that can sink a community: Compliance Hierarchy, Communication and Transparency and how to avoid the perils of the legal sea e.g. the proper reasons for holding executive sessions, allowing for the inspection of records, ensuring that your association is in compliance with state laws and the value of effective communication.

Sponsored by: Bellwether Property Group

12:30 - 1:00 PM • EXHIBIT HALL

1:00 - 2:00 pm • General Session III

A: LEGAL/INSURANCE PANEL

(GLASS ROOM)

Speakers: Scott J. Sandler, Esq., CCAL – Sandler & Hansen, LLC
Adam J. Cohen Esq. – Pullman & Comley, LLC
Robert A. Pacelli – Zeldes, Needle & Cooper, P.C.
Henken – CAU of America

Moderator: Karl Kuegler, Jr., CMCA, AMS, PCAM – Imagineers, LLC

Are legal issues taking the wind out of your association's sails? Our panel of legal and insurance professionals will answer your questions and help to keep your community on course.

Sponsored by: Imagineers, LLC

**B: LUNCH WITH AN EXPERT
OF YOUR CHOICE**

(WAGON ROOM)

*Pre-registration for this session is required. Additional \$35 fee required.
Seating limited to 8 per expert.*

Moderator: Frank Pingelski – Tooher Ferraris Insurance Group

Have lunch with ONE expert of your choice from a list of the best and brightest in our industry. This is a great opportunity to explore your concerns on a specific topic with a small group of your peers in a more comfortable setting.

Your Choice includes:

- **Legal: General for Board Members**
Ari J. Hoffman, Esq. – Cohen and Wolf, P.C.
- **Legal: General for Managers**
Bill Ward, Esq., CCAL – Ackerly Ward & McKirdy LLC
- **Legal: General for Managers**
Franklin Pilicy, Esq. – Pilicy & Ryan, PC
- **Legal: Executive Sessions, Hearings and Fines**
Brian Smith, Esq. – Robinson + Cole, LLP
- **Legal: Corporate Transparency Act & General Legal**
Ron Barba, Esq. – Bender, Anderson & Barba, PC
- **Insurance**
Dave Pilon, CIRMS – Bowvier Insurance
- **Insurance**
Carrie Mott – Bowvier Insurance
- **Construction Project Management**
Russ Fernandes – Becht Engineering, BT, Inc.
- **Reserve Studies**
Dave Chesky – The Falcon Group



2:00 PM • DOOR PRIZE DRAWING (WAGON ROOM)

**YOUR NAMETAG IS YOUR
PRIZE DRAWING CARD**

Deposit your Nametag at the entrance
to the Wagon Room at 2:00 pm.

**REGISTRATION INFO
ON THE NEXT PAGE...**