



## **THE SURETY & FIDELITY ASSOCIATION OF AMERICA 2017 FUNDAMENTALS OF COMMERCIAL SURETY SEMINAR**

**October 23-25, 2017**

**Chicago, IL**

This seminar will provide both an overview and detail regarding the commercial surety line of business. Instructors will be knowledgeable commercial surety underwriters with years of experience. The Seminar will provide the entry level surety professional (up to 3 years of experience) with information and underwriting considerations regarding the many types of commercial surety bonds. Underwriting issues will include topics such as bond language evaluation, financial analysis, and assessment of the class of business risk. The seminar also will include a session on marketing commercial surety. Instruction will be supplemented with interactive case studies. Take advantage of this worthwhile educational resource!

The seminar will be held in Chicago at the Embassy Suites Hotel – Downtown (600 N. State Street). Register early. Space is limited. To enhance the educational experience of the students, registration will be capped at 30, students.

### **INFORMATION**

#### **ADVANCE REGISTRATION**

We will be accepting registrations on a first-come, first-served basis. To register, please fill out the attached form and return it with the registration fee to: Meetings Department, The Surety & Fidelity Association of America, 1140 19th Street, NW, Suite 500, Washington, DC, 20036. Please submit your registration by September 15, 2017, to ensure that you are included on the advance registration list. To verify that space is available, please call 202-463-0600.

#### **CANCELLATION POLICY**

A full refund of the seminar registration fee will be provided if the reservation is canceled by September 19, 2017.

#### **HOTEL INFORMATION**

To make hotel reservations, please call the Embassy Suites directly at 1-800-445-8667 or access the reservations site through the Internet at <http://embassysuites.hilton.com/en/es/groups/personalized/C/CHIDWES-CSS-20171023/index.jhtml>. A special rate of \$249.00 per night is available for meeting attendees. All reservations must be guaranteed with a valid credit card and are subject to a 72-hour cancellation policy. Please mention that you are attending The Surety & Fidelity Association of America Commercial Surety Seminar. This special rate is available until September 22, 2017.

**THE SURETY & FIDELITY ASSOCIATION OF AMERICA**  
**2017 FUNDAMENTALS OF COMMERCIAL SURETY SEMINAR**  
October 23-25, 2017  
Chicago, IL

**PROGRAM SCHEDULE**

**October 23, 2017**

**6:00 p.m. – 7:00 p.m.**

**SEMINAR REGISTRATION**

**6:00 p.m. – 8:00 p.m.**

**WELCOMING RECEPTION**

**October 24, 2017**

**8:00 a.m. – 8:30 a.m.**

**CONTINENTAL BREAKFAST**

**8:30 a.m. – 8:45 a.m.**

**WELCOME & INTRODUCTION**

**8:45 a.m. – 9:30 a.m.**

**BOND FORM CONCEPTS**

This session will address various provisions found in a bond form that affect the risk profile of the bond.

**9:30 a.m. – 10:15 a.m.**

**LICENSE & PERMIT BONDS**

This session will address the underwriting considerations, bond forms and statistics of three frequently written license and permit bonds: contractor's license, motor vehicle dealer and mortgage broker.

**10:15 a.m. – 10:30 a.m.**

**BREAK**

**10:30 a.m. – 11:15 a.m.**

**FIDUCIARY BONDS**

This session will cover the forms and underwriting considerations of various types of fiduciary bonds – administrator, executor, guardian, and trustee.

**11:15 a.m. – 12:00 p.m.**

**INDEMNITY AGREEMENTS**

This session will cover the clauses of a typical general agreement of indemnity. This session also will include a discussion of the requirements of taking indemnity correctly, depending on how the principal is organized (corporation, partnership, limited liability company, sole proprietorship).

**12:00 p.m. – 1:00 p.m.**

**LUNCH**



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**PROGRAM SCHEDULE**

**October 24, 2017 continued**

**1:00 p.m. – 1:45 p.m.**

**COURT BONDS**

This session will cover the forms and underwriting considerations of various types of bonds required in court proceedings – defendant's appeal, attachment and replevin.

**1:45 p.m. – 2:30 p.m.**

**MISCELLANEOUS BONDS**

This session will cover the forms and underwriting considerations of various types of miscellaneous bonds, including various types of financial guarantee bonds.

**2:30 p.m. – 2:45 p.m.**

**BREAK**

**2:45 p.m. – 3:30 p.m.**

**FINANCIAL STATEMENT ANALYSIS**

This session will present techniques and skills to assist the surety professional in navigating his or her way through the bond principal's financial statement, including the principal's annual report and 10K.

**3:30 p.m. – 4:15 p.m.**

**GENERATING BUSINESS—MARKETING COMMERCIAL SURETY**

This session will cover techniques and considerations for building your commercial surety book of business.

**4:15 p.m. – 5:30 p.m.**

**NON CONSTRUCTION CONTRACT BONDS**

This session will examine the underwriting considerations regarding a growing class of commercial surety - bonds that secure the performance of a non-construction contract, such as a contract to provide various services (e.g. transportation, advertising, and accounting).

**October 25, 2017**

**8:00 a.m. – 8:30 a.m.**

**CONTINENTAL BREAKFAST**

**8:30 a.m. – 9:40 a.m.**

**REVIEW AND CASE STUDY #1**

**9:45 a.m. – 10:55 a.m.**

**REVIEW AND CASE STUDY #2**

**11:00 a.m. – 12:10 p.m.**

**REVIEW AND CASE STUDY #3**

**12:10 p.m.**

**ADJOURN**



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LAST NAME

FIRST NAME

MI

NAME AS YOU WISH IT TO APPEAR ON YOUR BADGE

COMPANY/FIRM

CITY

STATE

ZIP

(AREA CODE) TELEPHONE

FACSIMILE

E-MAIL

**REGISTRATION FEES**

(includes course materials, opening reception on October 23, continental breakfast on October 24-25 and lunch on October 24)

SFAA MEMBERS	\$439
NON-MEMBERS	\$529

**Pay by Check or Credit Card**

**Checks**

Make checks payable to The Surety & Fidelity Association of America. Return this form with payment to Meetings Department, 1140 19th Street, NW, Suite 500, Washington, DC, 20036

**Credit Card (see form on next page)**



## **Credit Card Authorization Form**

Type of Card

Visa

Mastercard

Name as it appears on card:

Company:

Billing Address:

Email Address:

Phone:

Credit Card Number:

Expiration Date:

CVV2/CVC2 Numbers:

(3 or 4 numbers from back of card)

Amount Authorized:

Item/Items Purchased:

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



**Please complete this form for credit card purchases and fax it to  
202-463-0606 with your order form. Thank you.**