



**CIPR AND THE INSTITUTES
GRIFFITH FOUNDATION
PRESENT**

**Back to Basics: Life/Health
Guaranty Associations**

**JUNE 25TH
1PM CENTRAL**

NAIC | CENTER FOR INSURANCE POLICY AND RESEARCH

Agenda:

Welcome and Introductory Remarks - Eryn Campbell, NAIC Research Library Manager
Origins and Evolution of Guaranty Associations – Evan Eastman
Current Status / Safety Net at Work – Janis Potter
Integration of Guarantee Associations within Solvency Framework – Donna Wilson
Q&A - Moderated by Frank Paul Tomasello, Executive Director, The Institutes Griffith
Foundation

Housekeeping items:

CE Information: Certificates will be emailed within two weeks. Attendees must stay for the duration of the webinar to receive credit.

To be notified of future Back to Basics webinars, subscribe to the [CIPR email list](#) or follow [CIPR](#) and [The Griffith Foundation](#) on LinkedIn.

This webinar will be recorded. To view recordings of previous Back to Basics webinars, visit the [NAIC Research Library website](#).



Learning Objectives

1. Participants will be able to explain the history and evolution of the L/H guaranty system and its role in consumer protection and market stability.
2. Participants will be able to describe the different roles and collaborative relationship between a receiver and a guaranty association.
3. Participants will be able to contrast the L/H guaranty system with the protections provided by the FDIC for banking consumers.

Speakers:

Evan M. Eastman



Evan M. Eastman is the Independent Life & Accident Insurance Associate Professor in the Dr. William T. Hold/The National Alliance Program in Risk Management and Insurance in the College of Business at Florida State University. He holds a B.S. in Economics from the Pennsylvania State University and a Ph.D. in Risk Management and Insurance from the University of Georgia. His current research focuses on financial accounting, taxation, enterprise risk management, and regulation. His work has been published in *The Accounting Review*, the *Journal of Risk and Insurance*, the *North American Actuarial Journal*, and the *Risk Management and Insurance Review*.

Evan's work has been presented at conferences including the FARS Midyear Meeting, the AAA Auditing Midyear Meeting, the ATA Midyear Meeting American Risk and Insurance Association, and the Financial Management Association, among others. His research has won awards from academic organizations as well as been cited by regulatory bodies. He has served as a reviewer for the *Journal of Risk and Insurance*, the *North American Actuarial Journal*, the *Journal of Insurance Issues*, the *Journal of Insurance Regulation*, and the *Risk Management and Insurance Review*. In addition to research, Evan's teaching includes principles of risk management and insurance, life and health insurance, and insurer operations.



Janis Potter

Janis Potter, Certified Public Accountant, is the Executive Director of the Illinois Life & Health Insurance Guaranty Association. She provides leadership in supporting insolvency, organizational and financial plans with the Board of Directors and staff and carries out plans and policies authorized by the Board. She is the primary contact to the Board of Directors and the Executive, Nominating, Audit & Finance, and Legal Committees, including the responsibility for oversight of staffing of all committees. Ms. Potter is active at the national level, servicing as NOLHGA Chair of the Accounting Issues and Education committees, and many other NOLHGA related groups, including Task Force Chair for a health insolvency.

Prior to joining the Association, Ms. Potter was Vice President at Mutual Trust Financial Group. . She serves on the Board of the Insurance Regulator Education Foundation.



Donna L. Wilson, CIR-ML



Donna Wilson has worked in the insurance industry since 1980 upon graduating from Oklahoma State University. In 1985, she started her receivership experience with the liquidation of Southwestern Insurance Company. Since then, her experience has included rehabilitation and liquidation of estates writing property and casualty, life and health, prepaid dental, MEWA, captive, and prepaid funeral trusts. Ms. Wilson is appointed by the Oklahoma County District Court as Assistant Receiver for several Oklahoma insurance receivership estates and is the Estate Manager for the Oklahoma Receivership Office, Inc. Ms. Wilson is a Certified Insurance Resolution Director for Multiple Lines. She currently serves as the Second Vice-President of the International Association of Insurance Receivers and was

President in 2016-2017. Ms. Wilson represents Commissioner Glen Mulready (Vice Chair) on the Receivership and Insolvency Task Force and co-chairs the Receivership Financial Analysis Working Group of the National Association of Insurance Commissioners. Ms. Wilson is also a member of the Association of Certified Fraud Examiners.



Moderators:

Eryn Campbell, MLS

Eryn Campbell is the Regulatory Research Services Manager at the NAIC where she conducts research for NAIC members, regulators, and staff and maintains a specialized and historic collection of nearly 10,000 items. She also manages the Journal of Insurance Regulation and the NAIC Fellows Program. Prior to joining the NAIC in 2014, she was a medical librarian at a regional health system. She serves on the boards of the Society of Insurance Research and the Kansas City chapter of the Special Libraries Association. Eryn holds a Master of Library Science from Emporia State University, a Bachelor of Arts in English from Southern Nazarene University and a paralegal certificate.



Frank Paul Tomasello, JD

Frank Paul Tomasello, JD, is Executive Director of The Institutes Griffith Insurance Education Foundation (“The Institutes Griffith Foundation”). He oversees the work of this affiliate of The Institutes and is responsible for advancing strategic plans, serving as a liaison to the Board of Directors and Advisory Council, and interacting with both internal and external stakeholders to further the organization’s mission. Prior to joining The Institutes Griffith Foundation in 2014, Tomasello held leadership roles at the American Law Institute-American Bar Association Committee on Continuing Professional Education (now known as ALI-CLE), a non-profit organization dedicated to educating lawyers. He was educated at Duquesne University School of Law. There, he served as a member of the Duquesne Law Review and received the “CALI Excellence for The Future Award” for his achievements in the study of advanced legal research and writing. Tomasello practiced law in his native Pittsburgh before transitioning to a career in the non-profit realm. He lives in suburban Philadelphia with his wife and son.