



## **PROFESSIONAL INDEMNITY INSURANCE CONFERENCE**

***“The past, the present, and the future - the lessons that they teach”***

1 - 3 JULY 2024

ROBINSON COLLEGE, CAMBRIDGE

### **THE CONFERENCE**

This is the twenty-sixth Conference arranged with support from the Professional Indemnity Forum. The event will once again cover a wide number of issues including:

- A review of recent issues and expectations for the future.
- Emerging issues facing the professions and the insurance market.
- Regulatory, legal and coverage developments in individual professions, including insurance brokers and solicitors.
- Significant legal decisions that are impacting on the professions' exposures and a look forward to what the next year may bring.

Following each presentation, time is set aside for delegates to discuss points and there will also be opportunities for participants to partake in the Symposium and raise issues for further discussion.

### **WHO IS THE CONFERENCE FOR?**

This Conference will be of interest to anyone involved in Professional Indemnity Insurance, including underwriters, claims managers, risk managers, lawyers and brokers.

### **THE PROFESSIONAL INDEMNITY FORUM**

PIF was formed many years ago by leading underwriters in the London Market with a view to improving levels of knowledge in the market as a whole. PIF is now a Committee of the International Underwriting Association of London Ltd (IUA). Membership is open to all IUA members together with invited underwriting representatives from other syndicates and companies. PIF presents a forum for discussion of issues of interest to the PI Market. It also seeks to promote sound principles for best practice, provide education to its members and formal liaison with other professional bodies. This Conference gives the members of PIF the opportunity to further its aims and to involve others in the industry who have an interest in Professional Indemnity Insurance.

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No.2 The Old Vicarage, Manor Road, Goring, Oxfordshire RG8 9DR  
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## CONFERENCE PROGRAMME

### **AN OVERVIEW OF ISSUES FACING THE MARKET**

*Chris Head, Senior Underwriter, Professional Indemnity, Axis Capital*

### **INSURANCE BROKERS - A REVIEW OF RECENT LEGAL DEVELOPMENTS**

*Felix Zimmermann, Partner, Simmons & Simmons*

### **“AN UNDERWRITER, A BROKER AND A CLAIMS MANAGER WALK INTO A BAR - YOU’D THINK THAT ONE OF THEM WOULD HAVE SEEN IT”**

**A DISCUSSION ON HOW CLAIMS, UNDERWRITING AND BROKING CAN COLLABORATE BETTER IN THE PI MARKET**

*Alex Barry, Claims Director, Collegiate*

*Robert Bass, Divisional Director, Financial Lines Group, Howden*

*Sarah Dando, Assistant Underwriter, Allianz*

### **A REVIEW OF RECENT DEVELOPMENTS IN PROFESSIONALS’ LIABILITIES**

*Amanda Savage KC, 4 New Square*

### **RESOLVING PROFESSIONAL INDEMNITY CLAIMS FROM A CLAIMANT’S VIEWPOINT**

*Tim Constable, Partner, Bates Wells*

### **BRAVE NEW WORLD - THE RISE OF AI AND ITS IMPACT ON THE LIABILITY OF PROFESSIONALS**

*Neil Howes, Partner, Mills & Reeve*

*David Gooding, Partner, Mills & Reeve*

*Jacqui King, Principal Associate, Mills & Reeve*

### **DEVELOPMENTS IN CONSTRUCTION PROFESSIONALS’ LIABILITY**

*Rebecca Austin, Partner, DAC Beachcroft*

*Matthew Olorenshaw, Partner, DAC Beachcroft*

### **CONSTRUCTION PROFESSIONALS - PANEL DISCUSSION**

*George Smeaton, Head of Professional Indemnity, Starr Companies*

*Nicholas Abbott, Senior Underwriter, Everest Global Markets*

*Matthew Olorenshaw, Partner, DAC Beachcroft*

*William Butler, Marsh Specialty Construction, Marsh*

*Tom Anderson, Executive Director, Aon*

### **THE POST OFFICE SCANDAL - LESSONS FOR INSURERS**

*Jim Simpson, Senior Claims Specialist, Financial and Professional Lines, HDI Global Specialty*

*Gary Oldroyd, Partner, Browne Jacobson*

### **SOLICITORS - RECENT LEGAL DEVELOPMENTS INCLUDING INTERPRETATION OF WORDINGS**

*Alexandra Charlton, Senior Associate, Clyde & Co*

*Jonathan Lawrence, Legal Director, Clyde & Co*

*Toby Rouse, Legal Director, Clyde & Co*

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**RECENT DEVELOPMENTS IN PROFESSIONAL LIABILITY LAW - (1) *DISCOVERY LAND V AXIS* (2)  
*MANCHESTER BUILDING SOCIETY 3 YEARS ON***

*William Flenley KC, Hailsham Chambers*

**SYMPOSIUM**

**OUR PANEL OF EXPERTS (EX PIF CHAIRMEN) WILL LEAD A DISCUSSION ON ISSUES RAISED BY DELEGATES**

*Paul Freeman, Senior Underwriter and AVP, Liberty Specialty Markets*

*Russell Newell, Director of Underwriting Strategy, Collegiate Underwriting*

*Rob McTaggart, Head of Professional Indemnity, Starr Underwriting Agents*

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## CHAIRPERSON



**DEBORAH HALL** has been a professional presenter for over 30 years. She was trained by BBC TV as a journalist and read the Local and National News on BBC-1. She was a News Anchor on BBC World (total 12 years). She is a very experienced Conference Chair, fronting nearly 100 conferences for the London insurance market, including all the Professional Indemnity Conferences. She still presents TV programmes and webcasts for businesses. Deborah coaches MBA students at Durham University and is the staff trainer for London Business School. She is the in-house trainer for various law firms and insurance brokers and underwriters. As a coach on the Civil Service Learning Panel, she has worked with Directors at the Departments of Health, Business Innovation & Skills, Work & Pensions and HM Treasury. Deborah has worked extensively in Europe over 25 years as media trainer for the European Centre for Disease Control and is the media consultant on the scientific side of Bill Gates/WHO's programme to vaccinate the world's poor (since 2000), training over 1000 delegates from 92 countries.

## PRESENTERS



**REBECCA AUSTIN** is a Partner at DAC Beachcroft. She specialises in construction and engineering matters. She has over 10 years' experience in this sector. Her clients include insurers, employers, developers, contractors, architects, engineers, project managers and other members of the professional team. She has experience across a wide range of projects including retail, leisure, residential and commercial schemes, power and energy plants, remediation works, utilities, road and infrastructure.



**TOM ANDERSON** is Executive Director at Aon. He has 20 years' experience in construction insurance. He was previously Group Insurance Manager at Sindall Morgan Group.



**ALEX BARRY** is the Claims Director at specialist professional indemnity MGA, Collegiate Management Services Ltd. His role at Collegiate gives him overall responsibility for claims arising from Collegiate's Underwriting business. In addition, Collegiate provide outsourced claims handling services to a number of PI insurers and syndicates. Alex has been in the market for 14 years and has worked at both insurers and MGAs, always focusing on financial lines and cyber.

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**ROBERT BASS** is Divisional Director, Financial Lines Group at Howden. With over 30 years experience, Robert has worked with some of the largest Financial Advisors in the UK. Robert focuses on the claims issues facing our clients' business and uses his extensive experience to negotiate with insurers and produce the best outcomes.



**WILLIAM BUTLER** is a Professional Indemnity broker at Marsh Specialty Construction based in London. William handles the PI renewals for some of the major Tier One UK contractors as well as specializing in New Business and large International project risks on a wholesale and retail basis. With a prior background in major PI claims he is able to bring a rounded view of PI risk from a technical and holistic standpoint. William enjoys finding new and innovative ways to address his client's risk profiles both within PI and beyond and has recently taken ESG risk as a point of focus.



**ALEXANDRA CHARLTON** is a Senior Associate at Clyde & Co in the Manchester office's Insurance, Finance and Professional Disputes team. She has experience in dealing with the defence of claims against a wide range of professionals, both at a pre-litigated stage and through all stages of litigation. She acts on behalf of PI Insurers and their Insured clients including solicitors, barristers, brokers, and construction professionals including surveyors and architects.



**TIM CONSTABLE** is a Partner at Bates Wells. He is a commercial disputes lawyer with over 30 years' experience in national and international dispute resolution. He has successfully resolved disputes in over 40 countries. He has a broad and adaptable commercial disputes practice. Tim has litigated in every type of English Court up to the Court of Appeal and arbitrated in many different institutions including LCIA, ICC, Gafta, LMAA. He specialise in mediation advocacy, having conducted nearly 200 mediations since the 1990s with a 90%+ success rate.

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**WILLIAM FLENLEY KC** of Hailsham Chambers practises in the fields of professional liability, insurance, regulatory and contract law. William is a former Chairman of the Professional Negligence Bar Association. He has contributed to Cordery on Legal Services and Professional Negligence and Liability, was deputy editor of Lloyd's Reports: Professional Negligence, and has lectured in law at the London School of Economics. He is a Bencher of the Middle Temple. He has been recommended as a leading barrister practising in professional liability by each of the two principal directories for many years and has been shortlisted in the Chambers Bar Awards 2020 as Professional Negligence Silk of the Year.



**PAUL FREEMAN** is UK Underwriting Manager at Liberty Specialty Markets. He has been Chairman of the Professional Indemnity Forum.



**DAVID GOODING** is a Partner at Mills & Reeve. David is a professional liability and policy coverage specialist. His practice is focussed on advising lawyers, accountants and financial professionals and their insurers on defending and resolving claims. He also advises insurers on policy coverage disputes and dishonesty investigations. David is head of the firm's national accountants' liability practice. His practice also includes handling the defence of disciplinary tribunal claims against lawyers, financial professionals and insolvency practitioners. He is regularly instructed to assist and defend professionals facing high profile and significant claims.



**CHRIS HEAD** is a Senior Professional Indemnity Underwriter at Axis Capital. Chris initially worked as a claims handler at RSA Group in Manchester, before moving into underwriting, which has been his main role for the last 16 years, including working at RSA Group, AmTrust and Canopus before his current role at Axis. He has an economics degree, is ACII qualified and is the current Chairman of PIF.



**NEIL HOWES** is a Partner at Mills & Reeve and a recognised expert in the field of professional indemnity. Neil's insight and expertise means that he is regularly instructed to handle high profile claims with significant reputational or financial implications for professionals and their insurers. His defence work for professionals in the legal sector covers both solicitors and members of the Bar. Neil also heads up Mills & Reeve's national construction insurance practice and he undertakes defence work for a wide range of architects, design & build contractors, and engineers.

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**JACQUI KING** is a Principal Associate at Mills & Reeve. She specialises in insurance coverage work across a wide variety of policies including Cyber, Directors and Officers and Professional Indemnity. She also assists insurers and insureds in defence work across a broad range of professional indemnity policies and has particular experience defending construction professionals and technology professionals. Jacqui also advises on general commercial dispute resolution.



**JONATHAN LAWRENCE** is a Legal Director at Clyde & Co. He specialises in resolving malpractice claims in the professional services sector and professional disciplinary proceedings. He has extensive experience of complex and high-value litigation in the High Court and Court of Appeal. In addition to civil claims, he acts in the defence of law firms and individual solicitors before the Solicitors Disciplinary Tribunal. Jonathan also advises law firms and individuals on regulatory issues and SRA investigations.



**RUSSELL NEWELL** is Director of Underwriting Strategy at Collegiate Underwriting. He has a degree in Economics from LSE and is ACII qualified. He has been underwriting since 1984 at Aegon, Sorema / Trenwick, Canopius and AmTrust. He is an ex-Chairman of the PI Forum (PIF), regularly speaks at the PI Conference supported by PIF and he co-wrote the chapter on IFAs for the Insurance Institute of London Professional Indemnity book. Russell was also instrumental in the establishment of the PIF 'test' a market recognised set of exams relating to PI.



**GARY OLDROYD** is a Partner at Browne Jacobson in the financial and professional risk team. Gary has specialised in the defence of claims against lawyers for over 20 years and he has been involved in several high-profile claims in this arena. Gary has acted for many of the 'Participating Insurers' who are authorised by the Solicitors Regulation Authority to provide insurance cover to law firms. In this capacity, he regularly provides coverage advice to insurers, in addition to regulatory advice to their insureds. Increasingly, Gary assists law firms to manage the consequences of data breaches including law firms who are the victims of cyber-crime.

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**MATTHEW OLORENSHAW** is a Partner in DAC Beachcroft. He has extensive experience of dispute resolution within the construction and engineering sphere. His main practice area involves advising major insurance clients on defending claims against construction professionals both in the UK and abroad, including architects, engineers, design and build contractors and specialist consultants. He advises insurers regularly on complex and high-value policy coverage issues. He has also acted directly, in major disputes, for parties on all sides of the construction industry in the UK and abroad, including employers, developers, main contractors and subcontractors.



**TOBY ROUSE** is a Legal Director at Clyde & Co in the Professional and Financial Disputes team in Bristol. He has over 15 years' experience in acting for insurers and their insured in relation to professional indemnity matters. Toby has particular experience in defending solicitors, accountants, insurance brokers, financial advisors and insolvency practitioners. Toby also regularly provides coverage advice to insurers.



**AMANDA SAVAGE KC** practises from 4 New Square in professional liability, disciplinary, insurance and general commercial litigation. Amanda has particular experience of claims against lawyers being regularly instructed by leading solicitors' insurers and BMIF. She is often instructed on regulatory cases and has particular experience in representing barristers before the Bar Disciplinary Tribunal. Amanda is an editor of Jackson and Powell on Professional Liability (Sweet and Maxwell, 9th edition, 2022), is Vice Chair of the Professional Negligence Bar Association and is a member of the London Common Law & Commercial Bar Association, The British Insurance Law Association and the Chancery Bar Association.



**JIM SIMPSON** IS *Senior Claims Specialist, Financial and Professional Lines at HDI Gerling*

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**GEORGE SMEATON** is Head of Professional Indemnity at Starr Companies. He is the current Chairman of the Professional Indemnity Forum.



**ROBERT MCTAGGART** is Head of Professional Indemnity at Starr Companies. He is a past chairman of the Professional Indemnity Forum. He has over many years' insurance underwriting and broking experience. Robert started his insurance career at Windsor's Insurance Brokers and moved into underwriting in 2005. He previously worked as underwriter at Norwich Union and Mitsui Syndicate 3210 before heading up the Professional Indemnity team at AVIVA before moving to his current role in 2017.



**FELIX ZIMMERMANN** is Partner at Simmons & Simmons. He is in the Insurance and Construction group. He has 20 years' experience of advising on defending claims against professionals including solicitors, brokers, financial advisers and construction professionals, and directors and officers. Felix regularly advises on coverage issues and disputes arising out of PI policies (e.g. on post-Grenfell claims) and on Management Liability, Financial Institutions, Warranty and Indemnity, Tax Liability, Political Risk and Trade Credit, Cyber and Aviation policies.

## **CONFERENCE INFORMATION**

### **DATES**

1st - 3rd July 2024

1st July - Registration from 4.00 pm, dinner at 6.00 pm followed by Punting on the Cam

2nd July - Registration from 8.00 am

2nd July - Conference commences at 9.00 am

3rd July - Conference Close 2.45pm

### **VENUE**

The Conference will be held at Robinson College, Cambridge

### **FEES**

The fee for the two-day Conference is £995.00 + VAT. The fee includes accommodation for 2 nights, refreshments, breakfast, lunch, dinner, banquet and any conference documentation.

### **ACCOMMODATION**

Student Single Study "en-suite" bedrooms located in the College building

### **SOLICITORS REGULATORY AUTHORITY CPD SCHEME**

This Conference qualifies towards Continuing Professional Development

### **CII CPD SCHEME**

This Conference may be used for the purpose of CPD

### **BOOKINGS**

To book places for the Conference, please email: [tony.gregory@imc-seminars.com](mailto:tony.gregory@imc-seminars.com)

or telephone: +44 (0)1491 872 839 / +44 (0)7712 482 212

### **PLEASE NOTE**

Joining instructions will be emailed to all delegates prior to the Conference. If you do not receive these, please contact us to ensure we have registered your booking. It may be necessary for reasons beyond the control of the organisers to change the speakers and/or alter the content and timing of the programme.

If you have any queries please contact Tony Gregory  
[tony.gregory@imc-seminars.com](mailto:tony.gregory@imc-seminars.com) +44 (0)1491 872 839 or mobile +44 (0)7712 482 212

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