

Date	Start	End	Speaker	Title	Company	Bio	Presentation Title
Monday, September 15th							
	9:00 AM	10:00 AM	Dan Swensen	Sr. Practice Director – Learning & Development	LAI ReSource Pro	Dan oversees the entire learning and development operations while working closely with the Field Support Mentor Team. As Sr. Practice Director of L&D, he implements best practices within the different teams and departments of the company to foster enhanced synergy and cohesion. After graduating with a Bachelor of Arts from the University of Utah in Communications, Dan began working with LAI as a field auditor in 2006. In 2017, he moved into a field mentor position, then a year later was appointed Director of Learning and Development before coming into his current role. Dan has been the driving force behind LAI's E-Learning and onboarding platform, revolutionizing auditor development and the onboarding process. He also implemented a new field support and mentoring program, including virtual mentoring sessions for field auditors. Dan and his wife, Amy, have two daughters and enjoy spending time as a family, playing sports, and being outdoors.	Keynote - What do you See?
	10:30 AM	12:00 PM	Tom Mosgrove	Filings & Research Consultant	National Council on Compensation Insurance	Tom is a Filings & Research Consultant in NCCI's Workers Compensation Infrastructure Operations, providing technical input on projects related to rules and classification. He brings 27 years of workers compensation experience to his role, having worked in data resources, premium audit, inspections, research, and underwriting. Tom earned a BA from the University of Kentucky.	Bureau Roundtable - NCCI, MN, IN & WI
			Terra Jordahl	Sr. Field Service Specialist/Test Auditor	Minnesota Workers' Compensation Insurers Association (MWCIA)	Terra is with the Minnesota Workers' Compensation Insurers Association (MWCIA), where she is the Sr. Field Service Specialist/Test Auditor. She has been with the Minnesota bureau (MWCIA) for over seven years and has been in the auditing industry for more than 17 years. Terra is currently active and has served on the board for both her local (MIAA)and regional (IAACS) auditor's associations and is currently a Regional Vice President for NSIPA representing Central States.	
			Daniel Geary	Classification and Inspection Analyst	Indiana Compensation Rating Bureau	Daniel has been with the ICRB for over 4 years. Before joining the ICRB he spent 8 years working in premium audit. He performed both field and phone audits during his time working with a carrier. He is a proud graduate of the University of Cincinnati with a degree in Finance.	
			Tad Cleveland	Senior Vice President, Technical Services	Wisconsin Compensation Rating Bureau	Tad joined the WCRB in 2005 in the capacity of Audit and Inspection Manager. Currently the Senior Vice President of Technical Services, he is responsible for the areas of Wisconsin Workers' Compensation Insurance Pool (WWCIP) administration, Inspection, Wisconsin Contractor's Premium Adjustment Program (WCPAP) and Ownership. Before joining the WCRB, Tad spent 19 years in the premium audit field working for Heritage Mutual, EBI Companies, and United Heartland. He holds a Bachelor of Arts Degree in Accounting from Iowa State University.	
	1:30 PM	2:30 PM	Rhonda Retterath de Garcia	Business Systems Manager – Atlas	National Council on Compensation Insurance	Rhonda is the Business Systems Manager for NCCI's Workers Compensation Operations Projects. She leads all content and application updates made to the <i>NCCI Atlas</i> platform. With an extensive tenure at NCCI, Rhonda has made notable contributions toward operational efficiencies in Experience Rating, Data Resources, Regulatory, and WC Operations. She is also skilled at resource development, people change management, and information design. Rhonda holds a master of public administration and policy from American University as well as dual bachelor's degrees in French and German from the University of Wisconsin.	NCCI Atlas
	3:00 PM	4:00 PM	Daniel Geary	Classification and Inspection Analyst	Indiana Compensation Rating Bureau	Daniel has been with the ICRB for over 4 years. Before joining the ICRB he spent 8 years working in premium audit. He performed both field and phone audits during his time working with a carrier. He is a proud graduate of the University of Cincinnati with a degree in Finance.	Bureau Inspections Role In Premium Audit
			Andrew Stoughton	Inspection/Audit Manager	Wisconsin Compensation Rating Bureau	Andrew has been with the WCRB for just over 6 years as an Inspector for 5 years and now as Inspections/Audit Manager. Prior to working at the WCRB he worked at the Office of the Commissioner of Insurance (OCI) for Wisconsin for 6 years working in the property and casualty division with a focus on worker's compensation.	
Tuesday, September 16th							
	9:00 AM	10:00 AM	Jim Dunleavy	AVP Senior Platform & AI Owner	EXL Premium Audit	Jim started with Overland Solutions doing phone surveys in 2004. A year later he moved to Accounting and held several positions in that department until he left the company in 2013. In 2016 he returned to the company and joined the IT team as a Sr. Business Analyst and now works as Senior Platform and AI Owner for the EXL Premium Audit team. He is passionate about delivering an exceptional customer experience for carriers, policyholders, and auditors. Jim lives in Tampa FL with his wife. On weekends they visit Mickey at Walt Disney World or head to the beach.	AI in Premium Audit - Friend or Foe?
	10:30 AM	11:30 AM	Jonathan Rippe	Senior Premium Auditor	Amerisure Mutual Insurance Company	Jonathan is a Senior Premium Auditor with Amerisure Mutual Insurance Company. He has been in premium audit since 2019, beginning his experience with Berkshire Hathaway Homestate Companies. In his time, Jonathan has completed audits across all NCCI and independent bureau states, created various trainings concerning manual rules and excel techniques, and is a mentor for new hires. He received a Masters of Science in Business Intelligence and Analytics in 2022 from Creighton University. He currently serves as the Vice President for the Insurance Auditors Association of Kansas City. In his spare time, Jonathan enjoys attending Husker football games, cantoring for mass, and traveling internationally.	Pivot tables and beyond
	11:30 AM	12:30 PM	Ryan Squatrito	Technical Service/Ops Mgr	Starr	With over 20 years of Premium Audit experience, Ryan has held roles at leading insurance companies including AIG, The Hartford, and Starr. His career has spanned a wide range of positions such as Field Auditor (Dedicated, Auditor, Senior Auditor, and Specialist), Test Audit Reviewer, Team Lead, Assistant Director/Regional Manager, Manager of Customer Support & Performance Enablement, and Technical Service & Operations Manager. In his current role at Starr as Technical Service & Operations Manager, Ryan oversees the Premium Audit and Billing Quality programs, manages Test Audit Program administration and compliance, and leads initiatives in procedure development, operational process improvement, and data analytics.	Getting the most out of your Technical Services / QA Program
	1:30 PM	2:30 PM	Michael Williams	Premium Audit Supervisor	Old Republic Risk Management Old Republic Insurance Group	Michael is a second-generation Premium Auditor. With almost 20 years in premium audit, Michael has handled physical and virtual assignments for numerous vendors and insurance carriers in both local territories and across the country. Extensive time performing physical audits in the field has provided him with many interesting (and some strange) encounters with insureds. Drawing from these sometimes awkward experiences, Michael brings a dynamic blend of insight and humor to help auditors conduct strong interviews that lead to accurate results.	Insuring the Interview - Audit with Accuracy and avoid the Awkward
	2:30 PM	3:30 PM	Kelly Altschul	Fraud Attorney	Wisconsin Office of the Commissioner of Insurance	Kelly was hired in May of 2024 as Wisconsin OC I's first Fraud Attorney and is, officially, the first and only employee in Wisconsin's Insurance Fraud Unit. Prior to embarking on this exciting experience she was with Wisconsin's Department of Revenue for ten years litigating tax matters of all types and providing general counsel to their multiple in-house law enforcement agencies.	Premium Audit Forfeiture