



## ANNUAL CONFERENCE

June 20 - 22, 2023 | Whitefish Lodge | Whitefish, MT



# 2023 Annual Conference

## Attendee List

*(As of 5/30/23)*

Attendee List Sponsored by



Daniel Auerbach .....	Attorney.....	Browning, Kaleczyc, Berry & Hoven, P.C. ....	Missoula, MT
Christopher Bartlett.....	CFO.....	Horizon Realty Advisors .....	Seattle, WA
Steve Beeghly .....	.....	ORCA Risk Retention Group .....	Seattle, WA
Jeff Bernhold.....	Manager, Risk .....	CareSource .....	Dayton, OH
Ramona Bidon .....	Captives Compliance.....	Office of the MT Commissioner of Securities & Ins. Helena, MT	
Derek Burdsall .....	Member Manager.....	Fenix Concepts, LLC.....	Tucson, AZ
Ed Buttrey.....	Representative.....	Montana State Legislature .....	Great Falls MT
Cinda Carbone .....	Executive Vice President.....	Active Captive Management, LLC.....	Lake Forest, CA
Truman Child .....	President.....	American Liberty Insurance Co. ....	Provo, UT
Amanda Clark .....	Employee Benefits Program Manager .....	MMIA .....	Helena, MT
Troy Downing .....	Commissioner of Insurance .....	Commissioner of Securities & Ins, MT State Auditor	Helena, MT
Dan Duncan .....	CEO .....	Agile Premium Finance Captive Specialist.....	San Diego, CA
Susan Euteneuer.....	Gen.Counsel & Chief Compliance Officer ...	Oxford Risk Management Group, LLC .....	Sparks, MD
Joe Foley .....	.....	Lone Peak Re, LLC.....	Rocky River, OH
Mandie Friar .....	Assistant Program Manager .....	Innovative Captive Strategies I, LLC.....	Bigfork, MT
Mary Claire Goff .....	Managing Member .....	The Taft Companies LLC .....	Towson, MD
Nancy Gray .....	Regional Managing Director - Americas .....	Aon .....	Burlington, VT
Aimee Grmoljez.....	Partner/Lobbyist.....	Crowley Fleck PLLP .....	Helena, MT
Diana Hardy .....	Audit Partner .....	RH CPAs, PLLC.....	Greensboro, NC
Dana Hentges Sheridan ....	Founder & Principal Advisor .....	CIRA Solutions, LLC.....	Los Angeles, CA
Phillip Holowka .....	COO.....	Complete Captive Management Services .....	Pittsburgh, PA
Matthew Holycross.....	Director of Finance .....	The Taft Companies LLC .....	Towson, MD
Alan Hulse.....	CEO .....	MMIA .....	Helena, MT
Patrick Hunter.....	Captive Examiner .....	Office of the MT Commissioner of Securities & Ins. Helena, MT	
Jeffrey Johnstone.....	Chairman & President.....	Stockman Risk Management, Inc. ....	Miles City, MT
Simon Kilpatrick.....	President.....	Advantage Insurance Management (USA) LLC...	Charleston, SC
Laura Kleisle.....	CEO .....	ORCA Risk Retention Group .....	Seattle, WA
Benjamin Larson .....	Program Manager .....	Innovative Captive Strategies I, LLC.....	Bigfork, MT
Merna Lechman.....	CFO.....	Montana Municipal Interlocal Authority.....	Helena, MT
Kari Leonard.....	Deputy Bureau Chief.....	Office of the MT Commissioner of Securities & Ins. Helena, MT	
Daniel Linton.....	Senior Consulting Actuary.....	Pinnacle Actuarial Resources, Inc.....	Bloomington, IL
John Malnar .....	Manager.....	Fringe Re, LLC .....	Billings, MT
Steve Matthews.....	Captive Coordinator.....	Office of the MT Commissioner of Securities & Ins. Helena, MT	
William Megna, Esq. ....	Attorney.....	Genova Burns, LLC.....	Newark, NJ
Laura Perisse.....	Chief Commercial Officer.....	Oxford Risk Management Group, LLC .....	Sparks, MD
Victor Puchi.....	Accountant.....	Fenix Concepts, LLC.....	Phoenix, AZ

Tal Redpath..... Captive Insurance Examiner ..... Office of the MT Commissioner of Securities & Ins. Helena, MT  
 Sherry Ricker..... VP- Senior Client Service Manager ..... Advantage Insurance Management (USA) LLC..... Austin, TX  
 Christopher Ridge ..... Director, Risk & Insurance ..... CareSource ..... Dayton, OH  
 Leon Rives..... Chief Visionary Officer ..... RH CPAs, PLLC..... Lexington, NC  
 Randall Ross..... Principal ..... Allegiant Actuarial Group, LLC..... South Jordan, UT  
 Donald Rousso..... Managing Principal ..... Pegasus Captive Management, LLC..... Irvine, CA  
 Dan Salomon ..... Senator..... Montana State Legislature ..... Ronan, MT  
 Marcey Selle ..... Attorney..... Womble Bond Dickinson (US) LLP ..... Charlotte, NC  
 Jeffrey Simpson ..... Partner ..... Womble Bond Dickinson (US) LLP ..... Wilmington, DE  
 Erin Snyder..... Financial Examiner ..... Montana Commissioner of Securities & Insurance . Helena, MT  
 Betsy Southworth ..... Partner & Consulting Actuary ..... Select Actuarial Services..... Nashville, TN  
 Matthew Spradling ..... Attorney..... Zerbe, Miller, Fingeret, Frank and Jadav, LLP..... Houston, TX  
 Steve Stafford ..... Fenix Concepts, LLC..... Tucson, AZ  
 F. Hale Stewart, JD, LL.M. . ..... alliantgroup ..... Houston, TX  
 Joe Streck..... Sr. Program Manager/Office Manager ..... Innovative Captive Strategies I, LLC..... Bigfork, MT  
 Tim Tarter ..... Captive Ins. Tax Audit & Litigation Defense. Woolston & Tarter, P.C. .... Phoenix, AZ  
 Dakota Terry ..... Captive Examiner ..... MT Commissioner of Securities & Insurance ..... Helena, MT  
 Gordon Thompson..... Consulting Actuary..... AmeRisk Consulting, LLC ..... Albuquerque, NM  
 Anne Marie Towle ..... Global Captive Solutions Leader ..... Hylant Group, Inc. dba Hylant Global Capt Sols Indianapolis, IN  
 Dan Towle..... President..... Captive Insurance Companies Association (CICA) Noblesville, IN  
 Adam Tunning ..... Attorney..... Moulton Bellingham PC..... Billings, MT  
 Steven Wade..... Attorney..... Browning, Kaleczyc, Berry & Hoven, P.C. .... Helena, MT  
 Christopher Woodruff ..... Director of Business Development ..... Select Actuarial Services..... Nashville, TN  
 Kellie Zacharko..... Director of Sales Implementation ..... Oxford Risk Management Group, LLC ..... Sparks, MD