



BUILDING RELATIONSHIPS. KEEPING THEM STRONG.

# PEARLMAN 2025

## 31<sup>ST</sup> ANNUAL CONFERENCE

SEPTEMBER 3-5, 2025



Register by August 15, 2025 to secure the "early bird rate"!

### MEET OUR CHAIRS



**JENNIFER FIORE**  
*Dunlap Fiore LLC*



**DENNIS O'NEILL**  
*Beacon Consulting Group, Inc.*



**SHAUNA SZCZECZOWICZ**  
*Philadelphia Insurance Companies*

## PEARLMAN COLLEAGUES!

We're thrilled to invite you to join us in Woodinville, Washington, from **September 3-5, 2025**, for what's shaping up to be one of our most memorable Pearlman Conferences yet.

Set in the heart of wine country, Woodinville offers the perfect backdrop for three days of connection, inspiration, and that unmistakable Pearlman energy. Whether it's your first year or your fifteenth, this event is built on our shared commitment to **building relationships—and keeping them strong.**

We'll kick things off Wednesday evening with a warm **welcome reception at the beautiful Willows Lodge**. From 4:30 to 7:30 PM, join us for an evening of live music, craft cocktails, and plenty of opportunities to reconnect, unwind, and set the tone for the days ahead.

Our educational program begins Thursday morning at Sparkman Cellars Winery, where we'll gather for two themed days of learning and conversation. **Thursday's theme**, inspired by Kenny Rogers' "**The Gambler**," is all about reading the room, knowing when to take a chance, and making smart decisions in an ever-changing environment. That evening, we'll stay right there at the winery for dinner, drinks, and our beloved **Hold 'Em Poker Tournament**.

On **Friday**, the tone shifts—think Kenny Loggins' "**I'm Alright**." We'll explore adaptability, resilience, and how to thrive (not just survive) through change.

After the day's sessions wrap, you'll have your choice of classic Pearlman fun: **Sip 'n Putt mini golf** at Rainbow Run, or a **traditional round at The Golf Club at**

**Redmond Ridge.** And if you're not quite ready to leave, the **annual wine tour rolls out Saturday morning** for those sticking around.

**A quick note on registration:**

All attendees (*yes, even surety folks*) must **register by August 15, 2025** to lock in the Early Bird Rate. Surety company employees attend for free—but we still need you to sign up.

We can't wait to welcome you to Woodinville. Let's raise a glass, **share our stories**, and make this the best Pearlman yet.

Sincerely,

*Luis Aragon*

**Luis Aragon**  
President

## CONFERENCE SCHEDULE

### DAY 1

WEDNESDAY  
SEPTEMBER 3

**4:30-7:30 PM:** Hospitality Reception at **Willows Lodge**.  
Enjoy live music, food, and drinks!

**Hosted by:** *The Vertex Companies, Inc.; Husted Law Firm; and Sage Associates, Inc.*

**Band hosted by:** *Faux Law Group and Friedrich Dishaw PLLC*

### DAY 2

THURSDAY  
SEPTEMBER 4

**7:00 AM:**

Breakfast buffet at **Sparkman Cellars Winery** (*right across from Willows Lodge*)

**Hosted by:** *CSG Law, Forcon International Corporation, RHISE, SMTD Law*

Espresso Bar

**Hosted by:** *MPCS*

All-Day Beverage Services

**Hosted by:** *Sokol Larkin*

**8:15 AM:**

Opening Remarks – Luis Aragon

**8:30 AM: Seminar – The Surety as the Gambler**

**10:00 - 10:15 AM:**

Morning Break Snacks

**Hosted by:** *RJT Construction, Inc.*

**11:45 AM - 1:15 PM:**

Lunch at Sparkman Cellars Winery

**Hosted by:** *Law Offices of James D. Curran; Aperture LLC; and Weinstein Radcliff Pipkin LLP*

**1:15 PM: Seminar, cont. – The Surety as the Gambler**

### PRICING

**Sustaining Member ... \$800**  
(before 08/15/25)

**General Attendee ..... \$925**  
(before 08/15/25)

**Sustaining Member .... \$850**  
(after 08/15/25)

**General Attendee ..... \$975**  
(after 08/15/25)



**REGISTRATION:**

- No fees for surety company employees
- Registration is required for all attendees
- Fees cover participation in all events

**ADDITIONAL DETAILS:**  
Spouses/significant others are welcome at social events at no extra cost.

**HOTELS:\***  
**Willows Lodge:**  
Call (425) 424-3900 for reservations (waitlist option only)

**Redmond Marriott Town Center:**  
Call (425) 498-4000 for reservations or **book online** thru August 13.

*\*Conference hotel rate: Pearlman*

## DAY 3

FRIDAY  
SEPTEMBER 5

**2:45 - 3:00 PM:** Afternoon Snacks

*Hosted by: RJT Construction, Inc.*

**3:00 - 3:15 PM:** Scholarship Presentation

**5:00 PM:** Welcome Reception and Dinner

*Hors d'oeuvres hosted by: Sokol Larkin, Jennings Haug Keleher McLeod Waterfall LLP, and Nicholson Professional Consulting*

*Dinner hosted by: Watt, Tieder, Hoffar & Fitzgerald, LLP; J.S. Held LLC; and RJT Construction*

**7:00 PM:** Hold 'Em Tournament

*(hone your risk management skills!)*

*Dealers hosted by: J.S. Held and Weinstein Radcliff Pipkin*

*Cocktails host by: Krebs Farley PLLC*

**7:30 - 8:15 AM:**

Breakfast buffet at [\*\*Sparkman Cellars Winery\*\*](#) (right across from Willows Lodge)

*Hosted by: Cashin Spinelli Ferretti LLC; Carney Badley Spellman P.S.; and Spencer Fane*

Bloody Mary Bar

*Hosted by: Dry Law, PLLC*

Espresso Bar

*Hosted by: MPSC*

Beverage Service

*Hosted by: Guardian Group, Inc.*

**8:15 AM:**

Opening Remarks – Luis Aragon

**8:20 AM: Educational Program – Everything's Alright**

**9:45 - 10:00 AM:**

Morning Break

**12:00 PM:** Bus Service to Rainbow Run + Redmond Ridge

*(The bus will come back to Rainbow Run to pick up anyone who wishes to attend the awards dinner at Redmond Ridge.)*

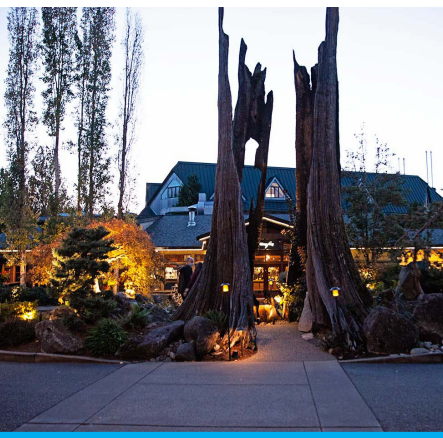
*Hosted by: Law Offices of Larry Rothstein*

**1:00 PM:** Sign in/Warm Up - Boxed Lunches provided for Golf and Sip 'n Putt\* attendees

*Sip 'n Putt hosted by: Booth Mitchel & Strange LLP, Guardian Group, Inc., Lewis Brisbois Bisgaard & Smith LLP, Liberty Mutual Surety*

*\*ALTERNATIVE option to The Scramble Tournament at The Golf Club at Redmond Ridge. **Limited to 60 people!***





## DAY 4

SATURDAY  
SEPTEMBER 6

**1:30 PM:** Scramble Tournament – Shotgun Start

Beverage Cart

**Hosted by:** Watt, Tieder, Hoffar & Fitzgerald, LLP, Ernstrom and Dreste, LLP

**6:30 PM:**

Dinner at The Golf Club at Redmond Ridge

Food truck: The Mann BBQ

**Hosted by:** Ward Hocker Thornton, PLLC

Cocktails

**Hosted by:** Sokol Larkin

**7:00 PM:** Golf Prizes Awarded + Closing Remarks

**7:30 PM:** Bus service returns to Sparkman Cellars Winery and Willows Lodge

*Audio Video (AV) is hosted by Fox Rothschild LLP for Thursday and Friday.*

## WOODINVILLE VALLEY WINE TOUR (ELECTIVE):

An exclusive wine tour will have you meandering through the lush Sammamish River Valley where celebrated and critically acclaimed wines are produced in 40 different wineries, all within 30 minutes of Seattle. If you plan on joining, **please note that in your registration.**

**Hosted by:** Torre, Lentz, Gamell, Gary & Rittmaster, LLP; SMTD Law LLP; The Law Offices of T. Scott Leo



# SPECIAL THANKS

**We proudly recognize the contributions of our Sustaining Members.** Your continued generosity allows us to put on an annual, company-run event, providing educational opportunities to the industry. Further, you allow us to award scholarships to deserving surety professionals. Please accept our sincere gratitude for your yearly contributions that help make the Pearlman possible:



Aperture LLC  
Bains Law PLLC  
Beacon Consulting Group  
Booth, Mitchel & Strange, LLP  
Bronster Fujichaku Robbins ALC  
Carney Badley Spellman, P.S.  
Cashin Spinelli & Ferretti, LLC  
Chiesa Shahinian & Giantomasi P.C.  
Clark Hill PLC  
D'Arcy | Vicknair, L.L.C.  
Dry Law PLLC  
Dunlap Fiore, LLC  
Elizer Law Group, LLC  
Ernstrom & Dreeste, LLP  
Fasano Acchione & Associates, LLC  
Faux Law Group  
Forcon International Corporation  
Fox Rothschild LLP  
Friedrich & Dishaw

Guardian Group, Inc  
J.S. Held, LLC  
JAMS  
Jennings Haug Keleher McLeod  
Kerr, Russell and Weber, PLC  
Koeller Nebeker Carlson Haluck LLP  
Krebs Farley  
Ward, Hocker & Thornton, PLLC  
Langley LLP  
Law Offices of James D. Curran  
Law Offices of John L. Fallat  
Lewis Brisbois Bisgaard & Smith, LLP  
Loewke Brill Consulting Group, Inc.  
Manier & Herod  
Markel Surety  
Matson, Driscoll & Damico  
MPCS  
Nicholson Professional Consulting Inc

PCA Consulting Group  
Phelps Dunbar LLP  
RiskScape Strategies, LLC  
RJT Construction, Inc  
Robins Kaplan LLP  
Robinson + Cole, LLP  
Sage Associates, Inc  
Simon, Peragine, Smith & Redfearn, LLP  
SMTD Law LLP  
Sokol Larkin  
Spencer Fane  
Torre, Lentz, Gamell, Gary & Rittmaster, LLP  
The Horowitz Law Firm  
The Hustead Law Firm  
The Vertex Companies  
Watt Tieder Hoffar & Fitzgerald, LLP  
Weinstein Radcliff Pipkin, LLP  
Wright, Constable & Skeen, LLP

A big thank you to **Rachel Charlton of Sticky Communications, LLC** for designing and developing all the e-blasts and conference collateral (including this invitation!), and to **Brian Rice of RiskScape Strategies, LLC** for keeping our website running smoothly, building the registration form, and making sure digital traffic flows in the right direction. Their contributions give Pearlman the polished, professional feel it deserves. If you see Rachel or Brian, give them a shoutout.

# DETAILED CONFERENCE AGENDA

SEPTEMBER 3-5, 2025

## DAY 1

WEDNESDAY  
SEPTEMBER 3

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**Band hosted by:** Faux Law Group and Friedrich Dishaw PLLC

## DAY 2

THURSDAY  
SEPTEMBER 4

### THE SURETY AS THE GAMBLER

#### 7:00 AM:

Breakfast buffet at [Sparkman Cellars Winery](#) (right across from Willows Lodge)

**Hosted by:** CSG Law, Forcon International Corporation, RHISE, SMTD Law

Espresso Bar

**Hosted by:** MPCS

All-Day Beverage Services

**Hosted by:** Sokol Larkin

#### 8:15 AM:

Opening Remarks – Luis Aragon

#### 8:30 AM:

**Program Introduction** – Co-Chairs: Jennifer Fiore, Dennis O'Neill, and Shauna Szczechowicz

#### 8:30 - 9:15 AM:

**Panel 1:** Know When to Hold Em. Know When to Fold Em.

**Topic:** Completing the Bonded Project

**Panelists:** Scott Williams, Sara Corbello, Rodney Tompkins, Jr., and Myat Cyn

#### 9:15 - 10:00 AM:

**Panel 2:** Know When to Walk Away. Know When to Run.

**Topic:** Defenses/denials of Claims payment/performance

**Panelists:** Ali Salamirad, Scott Olson, Michael Cronin, and Gene Zipperle

#### 10:00 - 10:15 AM:

Morning Break Snacks

**Hosted by:** RJT Construction, Inc.

#### 11:45 AM - 1:15 PM:

Lunch at Sparkman Cellars Winery

**Hosted by:** Law Offices of James D. Curran; Aperture LLC; and Weinstein Radcliff Pipkin LLP



## DAY 2, cont.

THURSDAY  
SEPTEMBER 4

### 10:15 - 11:00 AM:

**Panel 3:** You Never Count Your Money While You're Sittin' at the Table

*Topic: Cyber Related Issues and the Surety*

*Panelists: Brian Rice, Michelle Cumberland, Stephanie Miller, and Allegra Perez*

### 11:00 - 11:45 AM:

**Panel 4:** There'll Be Time Enough for Countin' When the Dealin's Done

*Topic: Indemnity*

*Panelists: Stuart Overton, Emory Allen, Rob Kelley, and Brandon Bains*

### 11:45 AM - 1:15 PM:

Lunch at Sparkman Cellars Winery

*Hosted by: Law Offices of James D. Curran; Aperture LLC; and Weinstein Radcliff Pipkin LLP*

### 1:15 - 2:00 PM:

**Panel 5:** The Secret to Survivin' Is Knowin' What to Throw Away and Knowin' What to Keep

*Topic: Insurance Recovery and the Surety*

*Panelists: Bill McConnell, David Kash, Tom Moses, and Pat Casey*

### 2:00 - 2:45 PM:

**Panel 6:** Every Hand's a Winner and Every Hand's a Loser

*Topic: Underwriting and How It Interfaces with Claims*

*Panelists: Kim Czap, Steven Rea, John Bondy, Chris Kapp, and Chris Wagner*

### 2:45 - 3:00 PM: Afternoon Snacks

*Hosted by: RJT Construction, Inc.*

### 3:00 - 3:15 PM: Scholarship Presentation

### 3:15 - 4:00 PM:

**Panel 7:** The Best You Can Hope for Is to Die in Your Sleep

*Topic: Ethical Dilemmas in Suretyship*

*Panelists: Adrian D'Arcy, Jeff Horowitz, Mike Saba, and Ben Chambers*

### 4:30 - 4:45 PM: Announcements and Adjournment for the Day

### 5:00 PM: Welcome Reception and Dinner

*Hors d'oeuvres hosted by: Sokol Larkin, Jennings Haug Keleher McLeod Waterfall LLP, and Nicholson Professional Consulting*

*Dinner hosted by: Watt, Tieder, Hoffar & Fitzgerald, LLP; J.S. Held LLC; and RJT Construction*

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## DAY 3

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# EVERYTHING'S ALRIGHT

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**Hosted by:** MPCS

Beverage Service

**Hosted by:** Guardian Group, Inc.

### 8:15 AM:

Opening Remarks – Luis Aragon

### 8:20 - 9:15 AM:

**Panel 1:** I'm Alright – But Is My Principal?

**Topic:** *Strategies and Best Practices for Identifying Warning Signs and Evaluating the Principal's Financial Health*

**Panelists:** Ty Oksuzler, Jon Pancio, Jim Curran, and Angela Zanin

### 9:15 - 9:45 AM:

**Panel 2:** Nobody Worry 'Bout Me – Or Should They?

**Topic:** *New Legislation and Case Law Impacting the Surety*

**Panelists:** Collin Vincent, Paul Friedrich, Xavia Gamboa, and Matt Geary

### 9:45 - 10:00 AM: Morning Break

### 10:00 - 10:45 AM:

**Panel 3:** Why You Got to Give Me a Fight – It's in Everyone's Best Interest to Settle

**Topic:** *Dispute Resolution and Litigation Strategies*

**Panelists:** Judge Chad Allred, Richard Tasker, Danny Lund, and Kim Steele

### 10:45 - 11:30 AM:

**Panel 4:** Can't You Just Let It Be – The Way We Used to Do Things

**Topic:** *AI, Innovation, Technology and the Future of Surety*

**Panelists:** Ryan Dry, Sonny Ingram, Doug Wynn, and Mike Sugar

### 11:30 - 11:45 AM: Closing Announcements and Adjournment

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