

Merger & Acquisition Activity Seminar Speaker Biographies

Joel Hopkins, Esq, Partner, Saul Ewing Arnstine & Lehr: *Joel Hopkins' practice includes representing the insurance industry in regulatory, organizational, operational, coverage, claims, bad faith and insolvency issues. He regularly counsels business clients on insurance and risk transfer matters, including complicated coverage and program issues relating to mergers and acquisitions. He also advises clients on insurance product development, compliance and evaluation. Joel creates, reviews and improves claims, coverage and regulatory policies, procedures and manuals, and provides expert evaluations of coverage and claim disputes.*

Joel serves as claims and coverage counsel to insurers, risk retention groups, group captives and self-insureds. His 10 years of insurance industry experience provides clients with practical claims handling and coverage advice with a focus on regulatory compliance and bad faith prevention. He serves as counsel to self-insured health plans and self-insured workers' compensation groups.

In his insurance litigation practice, Joel represents the insurance industry in contractual and regulatory disputes arising under life, health and property and casualty insurance policies. He litigates coverage and bad faith actions in state and federal courts and represents insurers and producers in regulatory investigations and enforcement actions before state insurance departments, including actions brought by the Pennsylvania Insurance Department as the rehabilitator or liquidator of insolvent insurers.

Joel is a frequent lecturer on a variety of insurance related topics, including insurance coverage, claims and bad faith, non-insurance risk transfers, captives, risk retention groups, self-insurance and contract surety, among others. Joel is also certified as a Professional Mediator through the Mediation Training Institute International and a Certified Mediator for the United States District Court for the Middle District of Pennsylvania.

In addition to his insurance practice, Joel handles transactional and litigation work associated with public and private construction projects. Joel has handled jury and bench trials on behalf of project owners and contractors, and has secured seven-figure settlements for his clients.

Prior to joining Saul Ewing Arnstine & Lehr, Joel worked for nearly 10 years as an insurance professional with two major insurance companies. During that time, he earned his Associate in Risk Management and Associate in Claims designations from the Insurance Institute of America.

Joel is admitted to practice in all Pennsylvania state and federal courts and in New Jersey state courts and the U.S. District Court for the District of New Jersey.

Steve Davis, Esq, Chair, Insurance Practice, Stradley Ronon: *Steve Davis is a nationally recognized insurance regulatory and coverage practitioner. As chair of Stradley Ronon's insurance practice, Steve helps manage the firm's insurance-related regulatory and coverage dispute and litigation engagements.*

For more than 20 years, he has provided skilled and experienced counsel and services in hundreds of insurance and reinsurance regulatory, coverage and litigation matters. As former general counsel of the Pennsylvania Insurance Department, Steve has vast experience providing counsel in a wide variety of insurance and

reinsurance transactional, compliance and enforcement matters. He is a known authority on insurance receivership and runoff issues, and represents the Pennsylvania Insurance Department in a variety of insurance receivership and other regulatory matters. Steve also has broad experience providing coverage dispute counseling and related litigation and mediation/arbitration services to property-casualty, flood/write-your-own (WYO), directors and officers (D&O), errors and omissions (E&O), life, health and long-term care insurers and reinsurers, and sophisticated commercial insureds. Steve also routinely advises producers in business matters, litigation and enforcement disputes.

Stephan Johnson, Insurance Financial & Regulatory Specialist, Stradley

Ronon: *With nearly 30 years' experience in the insurance industry, Stephen Johnson advises on insurance and insurer-related financial transactions with a focus on identifying and addressing insurance regulatory issues. He works with clients on the insurance regulatory implications of mergers, acquisitions and joint ventures; implementation of new regulatory requirements; reviewing transactional documents for insurance regulatory issues and possible alternatives; designing and developing presentations to regulators; and creating and assessing workout options for troubled companies.*

Stephen served as Deputy Insurance Commissioner for the Pennsylvania Insurance Department's Office of Corporate and Financial Regulation from 1998-2015 where he oversaw the Bureau of Company Licensing and Financial Analysis and the Bureau of Financial Examinations. These bureaus have primary responsibility for carrying out the department's financial solvency regulation and are also responsible for company licensing; financial analysis; financial examinations and the review of proposed acquisitions, mergers, restructurings and other corporate changes and transactions involving Pennsylvania insurers.

Anthony Latini, Managing Director, Boenning Scattergood: *Mr. Anthony A. Latini, Jr., also known as Tony, CFA has been Managing Director of Boenning & Scattergood, Inc. since April 25, 2011. Mr. Latini served as Managing Director at Curtis Financial Group LLC for 10 successful years. Mr. Latini has provided corporate finance and investment banking services to middle market and large corporate clients for the past 14 years. Mr. Latini focus on initiating and executing investment banking transactions as well as expanding and strengthening relationships within the financial services sector. Mr. Latini has more than 20 years of experience and expertise serving in corporate finance advisory and investment banking roles to insurance companies, banks and middle market companies. He focuses on merger and acquisition advisory services and capital raising for clients in a wide variety of industries including manufacturing, distribution and financial services. His merger and acquisition transaction experience includes over \$1.5 billion in transaction value and he has assisted in raising in excess of \$500 million in debt and junior capital. Prior to joining Curtis Financial Group, he was a director in the Financial Services Group at Berwind Financial L.P. He also has held positions at Evans & Company, Inc., an equity buyout group, and CoreStates Financial Corp.*

In his professional capacity, he has addressed numerous trade associations on topics such as mergers, acquisitions and valuations, and has been quoted in CFO Magazine, Investment Dealers Digest, Mergers and Corporate Policy, American Banker and National Underwriter. He received his Bachelor of Science degree in Economics with a concentration in Finance from the Wharton School of the University of Pennsylvania. He holds the designation Chartered Financial Analyst (CFA). His Professional Affiliations include Association for Investment Management and Research, Financial Analysts of Philadelphia, Pennsylvania Association of Mutual Insurance Companies (2000-2001 Chair, Financial Management Committee), Crime Prevention Association (past Chair of Finance Committee).