

THURSDAY, **NOVEMBER 3, 2016** + 11:30 A.M.-5:00 P.M.

HILTON GARDEN INN + 1749 SCOTT BOULEVARD + TEMPLE, TX 76504



EARN 3 CPE CREDITS

BUILD YOUR PROFESSIONAL SUCCESS

CFMA has the members with
the **EXPERIENCE, EXPERTISE**
and **ADVICE** to help you!

■ QUESTIONS:

Contact: Christine Wells at
Ckg-cfma@templecpa.com or 254-773-9907

SUBGUARD & SUB PREQUALIFICATION

Presented by: Marc McKerley, Crowe Horwath; Andy Taylor, Aon

■ SCHEDULE:

11:30 a.m.-11:45 a.m.

Networking and registration

11:45 a.m.-12:00 p.m.

Lunch buffet lines open and announcements

12:00 p.m.-1:00 p.m.

VENERABLE OR VIABLE? RECENT DEVELOPMENTS IN SUBCONTRACTOR DEFAULT INSURANCE

Andy Taylor, Aon (1 hour of CPE)

- Recent changes in SDI
- Foreseeable issues as the market hardens
- Comparison of different programs available today
- Importance of prequalification standards

1:15 p.m.-3:00 p.m.

UNDERSTANDING A SUBCONTRACTOR'S FINANCIAL STATEMENTS – THE PREQUALIFICATION PROCESS

Marc McKerley, Crowe Horwath (2 hour of CPE)

- A discussion regarding why contractor's fail
- A case study that includes a review of:
 - A subcontractor's financial statements
 - Subcontractor's job schedules
 - Subcontractor's completed prequalification questionnaire
- Goal – to understand the underwriting effort needed to address potential risks

3:00 p.m.-5:00 p.m.

Cocktails and Networking

■ REGISTRATION + PAYMENT:

Online: [CFMA Heart of Texas Chapter Events](#)

Mail: CFMA Heart of Texas Chapter, c/o Christine Wells
3520 SW HK Dodgen Loop
Temple, TX 76504

Registration Fee: Members & Non-Members: \$75

Credit cards are accepted at the door

Checks payable to: Heart of Texas Chapter of CFMA

Registration deadline is October 31, 2016

Cancellation with refund is due by October 31, 2016

Name _____

CFMA Chapter _____

Company _____

Address _____

City, State, Zip _____

Phone _____

E-Mail Address _____

I WILL attend Cocktails and Networking 3:00 p.m.-5:00 p.m.

REGISTRATION FEES:

The conference registration fee of \$75 for CFMA members and non-members. All registrations must be received by Monday, October 31, 2016

To Register: Please mail check (payable to CFMA) and registration form to **Christine Wells, c/o CFMA, 3520 SW HK Dodgen Loop, Temple, TX 76504**. We also accept credit cards at the door. All registrations must be received by Monday, October 31, 2016. Registrations received after this date will be accepted on a space-available basis.

CONFERENCE QUESTIONS?

Christine Wells

Ckg-cfma@templecpa.com or 254-773-9907

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