

RISK MITIGATION

THE ABC'S OF OCIP'S, CCIP'S & SURETY BONDS

**Presented by Marc Williams
& Charity Moser of Gallagher Lutgert**



Marc joined Lutgert Insurance in 1996 as a Sale Executive advancing to become an agency principal in 2000. He has been a local resident of Naples since 1977 & received a Bachelor of Science degree from Florida State University in Risk Management & Insurance. In November of 2017 Marc and his partners sold Lutgert Insurance to Arthur J. Gallagher & Co. Marc currently serves as the Area Executive Vice President; he's a licensed property, casualty and health agent focusing primarily in the construction industry and with condominium association risks. Marc previously served as a Director on the "American Specialty Contractors of Florida" board, along with a few of our current members.



Charity joined Lutgert Insurance in 2006 as a Producer and Director of Construction handling both our Surety and Construction Departments. Charity is a Florida native and has been a resident in Naples since 1994. Over the last twenty-five years her primary focus has been within the construction and real estate development industries. Charity is a licensed property, casualty, and health agent with a special niche for surety. Previously Charity was the Senior Risk Manager for WCI Communities, a publicly traded real estate developer, where she was responsible for the risk management, loss prevention, claims and surety departments. Prior to WCI, Charity worked for Collier Enterprises as the Finance/Risk Manager responsible for treasury, finance and risk management. Charity is a frequent speaker on the topics of managing construction risks, OCIP/CCIP's and surety for a number of professional organizations.

Attendees will learn:

- **How OCIP's & CCIP's Work**
 - Benefits of Coverage
 - Underwriting
 - Administrative and Claims Consolidation
 - Program Comparisons
- **Surety Bonds**
 - The Parties Involved in the Arrangement
 - Principal, the Oblige and the Surety
 - Two Types of Sureties
 - Commercial and Contract



WHEN

**Wed., October 17th
5:00 – 7:00 p.m.**

WHERE

**Embassy Suites by
Hilton Fort Myers-
Estero**

**10450 Corkscrew Commons Dr.
Estero, FL 33928**

REGISTRATION FEES

**FREE - Members
FREE - Non-Members
Guests Welcome!**

TO REGISTER:

Click Below:

<https://conta.cc/2xCjzpX>

**Business Practice
Interchange (BPI)
Will Also Take
Place at This
Meeting.**