



Third Annual SimErgy ERM Boot Camp New York June 24-26, 2013

CURRICULUM

SimErgy ERM Boot Camp is a practical hands-on training program providing tangible skills that can be applied immediately to successfully implement or advance ERM programs. This program uses a stimulating and dynamic combination of lectures, individual exercises, small group exercises, large group exercises, and case studies.

WHO SHOULD ATTEND

SimErgy ERM Boot Camp is for individuals involved with identifying, measuring, managing, or disclosing risks, or those with oversight over those functions. This includes:

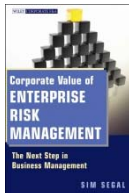
- Heads of ERM programs, such as chief risk officers (CROs) or those functioning in that capacity
- Corporate ERM team members that conduct qualitative risk assessments or build models to quantify risks
- Heads of internal audit
- Senior executives, such as CEOs and CFOs
- Directors, including chairs of audit committees and chairs of risk committees
- Heads of external relations or those communicating with analysts and rating agencies

INSTRUCTOR



SIM SEGAL, FSA, CERA is a globally-recognized ERM thought leader renowned for his engaging presentation style. Segal is president of SimErgy, which provides a full range of ERM consulting services; adjunct professor at Columbia University, where he teaches an ERM course; author of *Corporate Value of*

Enterprise Risk Management, which has been well received by the business community and is now required reading on syllabi of the SOA and an increasing number of leading universities; and host of *Risk Radio*, a weekly radio show. Segal has given over 100 presentations on ERM and risk-related topics. He is frequently quoted by media, such as Wall Street Journal, Treasury & Risk, and CFO Magazine. Segal has authored numerous articles in leading publications, such as Forbes, American Banker, and Corporate Finance Review. Segal is former VP on the board of directors of the Society of Actuaries, where he also served as inaugural chairman of its Risk Committee, leading the design and implementation of ERM for the profession. He is a Fellow of the Society of Actuaries and a Chartered Enterprise Risk Analyst.



TOP 10 SKILLS GAINED BY ATTENDEES

1. Implement an advanced yet practical ERM framework
2. Quantify strategic and operational risks
3. Clearly define risk appetite on a quantitative basis
4. Integrate ERM into decision making, such as strategic planning, strategic & tactical decisions, & transactions
5. Avoid the 5 common mistakes of risk identification
6. Evaluate your ERM program against 10 key ERM criteria
7. Conduct effective qualitative risk assessment surveys
8. Develop a risk categorization and definition (RCD) tool
9. Develop risk scenarios using the Failure Modes and Effects Analysis (FMEA) technique
10. Learn techniques to build buy-in with key stakeholders and satisfy ORSA requirements

SUMMARY PROGRAM

Day 1: ERM Infrastructure

- 1) Introduction
- 2) Defining ERM
- 3) ERM framework
- 4) Risk governance
- 5) ERM vendors

Day 2: Risk Identification

- 1) Risk categorization and definition
- 2) Qualitative risk assessment
- 3) Emerging risk identification
- 4) Killer risks

Day 3: Risk Quantification and Defining Risk Appetite

- 1) Developing a quantitative ERM model
- 2) Calculating baseline company value
- 3) Quantifying individual risk exposures
- 4) Quantifying enterprise risk exposure
- 5) Defining risk appetite

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WWW.SIMERGY.COM/REGISTRATION
OR CALL (646) 862-6134

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Detailed Program



Day 1 (Monday, June 24, 2013)	
8:30am - 9:00am	Breakfast and Registration
9:00am - 10:30am	1) Introduction <ul style="list-style-type: none"> Evolution of ERM Challenges to ERM 2) Defining ERM <ul style="list-style-type: none"> Definition of risk Basic definition of ERM The 10 key criteria of ERM
10:30am - 10:45am	Refreshment Break
10:45am - 12:10pm	<ul style="list-style-type: none"> The 10 key criteria of ERM (cont.) Exercise 1 (group): Evaluate case study against the 10 key criteria ERM process cycle Benefit of ERM to stakeholders
12:10pm - 1:00pm	Lunch
1:00pm - 3:00pm	3) ERM Framework <ul style="list-style-type: none"> Three core challenges typical of traditional ERM frameworks Value-based ERM framework Lessons from the financial crisis Non-corporate entity framework
3:00pm - 3:15pm	Refreshment Break
3:15pm - 4:45pm	4) Risk governance <ul style="list-style-type: none"> Roles and responsibilities Organizational structure Policies and procedures 5) ERM vendors <ul style="list-style-type: none"> How vendor offerings fit in
Day 2 (Tuesday, June 25, 2013)	
8:30am - 9:00am	Breakfast
9:00am - 10:30am	1) Risk categorization and definition <ul style="list-style-type: none"> Risk categorization/definition tool Defining risks by source Categorizing risks evenly Exercise 2 (group): Categorize risks Exercise 3 (solo): Categorize risks
10:30am - 10:45am	Refreshment Break
10:45am - 12:10pm	<ul style="list-style-type: none"> Exercise 4 (group): Categorize risks 2) Qualitative risk assessment <ul style="list-style-type: none"> Participant identification Advance communication Defining metrics clearly
12:10pm - 1:00pm	Lunch
1:00pm - 3:00pm	<ul style="list-style-type: none"> Qualitative risk assessment survey Gathering data appropriately Identifying risks prospectively Exercises 5/6 (pairs/switch roles): Conduct surveys Consensus meeting
3:00pm - 3:15pm	Refreshment Break
3:15pm - 4:45pm	3) Emerging risk identification <ul style="list-style-type: none"> Monitoring for known risk Environmental scanning 4) Killer risks

Day 3 (Wednesday, June 26, 2013)	
8:30am - 9:00am	Breakfast
9:00am - 10:30am	1) Developing a quantitative ERM model <ul style="list-style-type: none"> Input of data and assumptions Model calculations Output of results 3) Quantifying individual risk exposures <ul style="list-style-type: none"> Input of data and assumptions Deterministic risk scenarios Developing scenarios using FMEA
10:30am - 10:45am	Refreshment Break
10:45am - 12:10pm	<ul style="list-style-type: none"> Exercise 7 (group): Conduct FMEA Model calculations Output of results Exercises 8/9 (group/solo): Quantify individual risk scenario Case studies
12:10pm - 1:00pm	Lunch
1:00pm - 3:00pm	4) Quantifying enterprise risk exposure <ul style="list-style-type: none"> Input of data and assumptions Model calculations Output of results Economic capital 5) Defining risk appetite <ul style="list-style-type: none"> Risk appetite consensus meeting Defining/quantifying risk appetite Case study
3:00pm	Adjournment

REGISTRATION

[To Register](#)

Register online: www.simergy.com/registration

Register by phone: Call (646) 862-6134

Registration Fee

Full 3-days: \$2,650 by May 17 / \$2,850 after May 17

Any 2 days: \$1,900 by May 17 / \$2,100 after May 17

Any 1 day: \$950 by May 17 / \$1,050 after May 17

Includes materials, breakfast, lunch, and refreshment breaks.

EVENT LOCATION

Regus Conference Center
 445 Park Ave. (between 56th and 57th Streets)
 10th Floor
 New York, NY 10022

FOR MORE INFORMATION

Call: (646) 862-6134

Email: info@simergy.com

Visit: www.simergy.com/seminars