

How to Self-Insure Workshop January 28th, 2026 Agenda

- **9:00 a.m. Welcome and Introduction**
Kris Tefft, WSIA Executive Director
- **9:15 a.m. Overview of the Qualifications and the Application Process**
James Vest, Certification Services Supervisor, LNI
Cyal Christmas, Compliance Operations Manager, LNI
- **10:00 a.m. Evaluating Self-Insurance: Finance, Risk Management, and Excess Insurance**
Michael Jokerst, Client Engagement Manager Safety National
Brian Weitzman, Marsh
- **11:00 a.m. - Break**
- **11:15 a.m. Aspects and Benefits of Self-Insurance – Claims**
Phil Valdens, President, Penser
- **12:00 p.m. Aspects and Benefits of Self-Insurance – Legal**
Aaron Bass, principal, SBH Legal
- **12:45 p.m. Lunch Break**
- **1:15 p.m. Evaluating a Compliant Safety Program**
Herb Sherburne, principal, Sherburne & Associates
- **2:00 p.m. Questions and wrap up**