

## **GENERAL TERMS OF SPEAKING AT CAS EVENTS**

Thank you for your interest in participating with a CAS educational event. As a potential participant in our program, you play a vital role in its success. This General Terms of Speaking at CAS Events (the “Policy”) applies to all events organized, hosted, sponsored, or otherwise affiliated with CAS and CAS regional and international affiliates. Please read the following carefully, as it contains important terms for speakers.

Speaking at a Casualty Actuarial Society event is an esteemed privilege. Speakers with CAS meetings have the singular task of preparing and delivering their presentations to an audience. Speakers are expected to represent the CAS well and complete any required tasks from the event coordinators. Presentations delivered at any CAS events must be consistent with the mission and purposes of CAS, which are set forth below:

- To advance the body of knowledge of actuarial science applies to general insurance, including property, casualty and similar risk exposures;
- To expand the application of actuarial science to enterprise risks and systemic risks;
- To establish and maintain standards of qualification for membership;
- To promote and maintain high standards of conduct and competence;
- To increase the awareness of actuarial science;
- And, to contribute to the well-being of society as a whole

### **Some Key Items Expected of CAS speakers**

1. Provide the draft presentation, transcript, handouts, etc. to moderators/coordinators for review and approval
2. Provide any scheduling conflicts to event coordinator
3. Upload a copy of the presentation for publishing to the web
4. Check the accuracy of presentation and contact information
5. Adhere to any deadlines put forth by event coordinator
6. Register for the event, if applicable, and make hotel room reservations.
7. Notify CAS in the event that an emergency should prevent you from meeting your obligations as a CAS speaker/presenter
8. Adhere to this Policy and any additional guidelines/policies relating to the CAS event

The length of presentations and specific topics will vary depending on the event. Speakers are frequently volunteers and offer a great service to our society. They are also afforded an incredible opportunity for personal growth and professional exposure.

### **Submission of Presentations via CAS Online Session Submission System**

The CAS asks that you submit your presentation to our Online Session Submission System. Events organized by CAS regional and international affiliates may have alternative presentation submission channels. PLEASE NOTE: As a general policy, CAS educational events and programs are paperless and attendees will need time in advance of the events to download presentations. Therefore, we kindly request that you adhere to any deadlines for submitting your presentation.

1. All materials should be prepared accordingly:
  - Title page listing session number, title and author(s)

- Please be sensitive to printing concerns and refrain from using slides which require excessive ink.
2. If you are using excerpts, including data from third party vendors, please be aware that some require advanced permission to reproduce from the original author(s). It is your responsibility to secure all such written permission.
  3. On the slides you submit for attendees to print it is suggested that you use page numbers and plain white/clear backgrounds for each slide for the following reasons:
    - Attendees use page numbers to assist them in following the presentation
    - Attendees use less ink when printing slides with white/clear backgrounds
    - Attendees are better able to view printed slides with white/clear backgrounds

### **Presentation Content Guidelines**

Participants attend CAS educational events and programs to receive information and increase their knowledge in actuarial principles, practices, issues and opportunities. In order to foster a positive learning experience built upon a foundation of respect and ethical behavior, speakers should abide by the content guidelines below.

- During the presentation you will not engage in any type of promotional marketing or selling of any product or service, and you will not disparage any of the sponsoring organizations.
- You will not include content that are libelous, defamatory, threatening, offensive, derogatory, or off-topic in your presentation, as determined based on CAS' sole discretion.
- To the best of your knowledge, your presentation does not violate any proprietary or personal rights of others (including any copyright, trademark, and privacy rights), is factually accurate, and contains nothing defamatory or otherwise unlawful. You have obtained all necessary permissions and/or licenses from any individual or organizations whose material is included or used in your presentation.
- You will not include content that may affect adversely the reputation of CAS or the actuarial profession, as determined based on CAS' sole discretion.

In addition, to ensure compliance with federal and state antitrust laws, presentation content and discussions along the following lines must be avoided:

- Fees to be charged for particular services;
- Whether a fee should be charged for a particular activity or services (for example, fees for initial consultations or for time commuting to a meeting with a client);
- Dividing up clients among competitors in a particular geographic area, or by area of actuarial expertise; Specific suggestions about limiting the availability of services that the actuary should agree to provide based on whether the client contracts for an additional level or types of service (for example, agreeing to provide a ratemaking product only if the client agrees to contract for other actuarial services);
- Any suggestion that an actuary should refuse to provide a particular actuarial service, or to work for a particular employer or client;
- Any suggestions about the appropriateness of actuaries undertaking work which is generally regarded to be within the providence of another profession (for example, accountants, auditors, or attorneys) or vice versa;
- Any suggestions about what constitutes appropriate advertising by the actuary; and
- Recommendations for, against or endorsements of, specific services or products which can be used by actuaries (for example, computer software). It is also recommended that speakers being their remarks

by stating that the speaker's view are not necessarily identical to the view of the sponsors of the program of the employees or clients of the speakers.

CAS reserves the right to decline a speaker's participation for violation of these content guidelines based on CAS' sole discretion.

### **Permission Grant**

- You grant CAS a worldwide, non-exclusive, royalty-free license to use, reproduce, and distribute your presentation materials, including session materials, handouts, slides, etc. in any way now or in the future, with all appropriate attribution to you. You retain copyright ownership of your presentation materials and may use your session materials as you see fit, including allowing others to use it.
- You authorize the CAS to record your presentation (audio and/or simultaneous PowerPoint) and make it available for purchase through the UCAS website. (If you do not want the CAS to publish your presentation (or make it available for sale) please opt out under the recording permission section of the online submission).
- You grant CAS permission to use your name, photograph, and biographical information for the purpose of promoting your appearance at CAS' events.

### **Travel Expenses**

You are responsible for all travel arrangements and expenses that you incur to participate in this Meeting or Seminar. Except by prior written approval by the chairperson of the meeting or seminar planning committee, you will not receive any royalties, honoraria, reimbursement of expenses, or other compensation from the sponsoring organizations for your participation in the program. Upon request and approved on a case-by-case basis, CAS may reimburse some travel expenses (such as airfare and one night at the hotel) for speak-and-leave speakers who are regulators, academics, or non-profit association employees.

### **Press**

You acknowledge that members of the press are invited to CAS events and that your session may be covered by external trade publications or by the CAS's internal member publications. The CAS may, as a courtesy, invite you to review resulting media; however, you agree that no portion of the resulting media created from the event, including your name, biographical information, quotes, photographs, or recorded interviews, needs to be submitted for any approval.