

You Are Cordially  
Invited To



# PEARLMAN 2017





Dear Pearlman Colleague,

On behalf of the Board of Directors and Sustaining Members of the Pearlman Association, you are cordially invited to attend the 24th annual Pearlman Gathering whose events will be held in the Seattle area from September 6-8, 2017.

The Pearlman event will kick off Wednesday afternoon with a hosted hospitality reception in the Gazebo and Patio area of the Willows Lodge from 4:30 p.m. to 7:30 p.m. Live music from local musicians Ernest Pumphrey and friends, scrumptious food and great friends make this a “must attend” reception, and we hope you are able to join us.

Thursday’s educational program will take place at the beautiful Columbia Winery, an incredible venue nestled in the Cascade foothills. The program is titled “Defense Wins Championships: Strategies and Ethics as Spearin Approaches 100” and focuses on important concepts dealing with defenses to performance bond claims, warranty claims, defective design specifications, and the damages caused from these. We have assembled various panels containing the leading surety attorneys, consultants, and company personnel to discuss several useful and informative aspects of claim handling with respect to performance and payment bond claims, as well as e-discovery and a touch of ethics as well. A hosted breakfast, buffet lunch, welcome reception and dinner will all be offered at the Columbia Winery on Thursday.

Friday’s half day program will consist of detailed panel discussions from lawyers, consultants, and company people regarding new discovery rules, the reptilian brain strategy, and ethical issues in dealing with electronic data. A hosted breakfast buffet will be offered at the Columbia Winery. This year will continue the tradition of having a hosted Bloody Mary bar with various fixings.

In addition to the seminar, Pearlman will follow a similar format to that of previous years which will include Thursday’s Dinner and the ever popular Hold ‘Em Tournament where participants can hone their risk management skills. Also included will be an 18-hole scramble on Friday afternoon at the Harbour Pointe Golf Club in Mukilteo, WA. We intend to offer bus service to and from the course again this year. We strongly encourage all golfers to try this out. After the conclusion of golf on Friday, dinner will be hosted at the Harbour Pointe Golf Club during which time we will award golf prizes and conclude the events, save for Saturday’s elective activities.

Saturday will include your choice of two sponsored elective events which have been arranged by Pearlman and certain of its sustaining members including an exquisite wine tour through the Woodinville Valley or a day at the horse races at Emerald Downs. If your plans include a Saturday stay, please make sure to indicate your elective activity on the attached registration.

Team pairings for Friday’s golf event will be based on perceived handicaps as determined by the Pearlman Committee. Prizes will be awarded for KP’s, longest drives and other significant events. For those who may be interested, hole sponsorship and/or donations for prizes should be coordinated through Jeff Olson or Lih Hudson as soon as possible. Prize and hole sponsorship has historically filled quickly so if you have interest, please call or e-mail early.

As with previous Pearlman Gatherings, there are absolutely no fees for surety company employees. Registration, however, is required for all attendees of our events. Registration fees will entitle the registrant to participate in all of the Pearlman events. Greens fees and carts will be paid for by Pearlman. There is no fee for the Hold 'Em Tournament. Spouses and significant others are welcome and encouraged to attend the social events at no additional cost. Please make your intentions (and those of your significant other) known on the attached registration and note that, historically, the popularity of each of the Pearlman events has them filling up quickly. Please don't be left out by registering late.

We look forward to seeing you at this premier surety event. Please fill out the attached form and return it as soon as you can via e-mail as indicated on the form.

We appreciate the enthusiastic support you have shown over the years and are excited to have you and your associates, colleagues and peers join us for what will be the finest Pearlman gathering to date. See you in September!

R. Jeffrey Olson

# CONFERENCE SCHEDULE

## Wednesday, September 6

**Willows Lodge – Woodinville, WA ([www.willowslodge.com](http://www.willowslodge.com))**

4:30-7:30 p.m. Hospitality Reception  
*Hosted by Langley, LLP,  
Vertex Construction Services, Inc.,  
Hustead Law Firm, and Sage Associates, Inc.*

Live music to be performed by Ernest Pumphrey  
*Hosted by Faux Law Group and Williams Kastner*



## Thursday, September 7

**Columbia Winery -- Woodinville, WA ([www.columbiawinery.com](http://www.columbiawinery.com))**

7:30 a.m. Breakfast Buffet  
*Hosted by Alber Frank PC, PCA Consulting  
Group and Forcon International*

All-Day Beverage Service  
*Hosted by Stewart, Sokol & Larkin, LLC*

8:00 a.m. Seminar – “Defense Wins Championships:  
Strategies and Ethics as Spearin Approaches  
100”

12:00 p.m. Lunch  
*Hosted by Wolkin Curran, LLP, Sage  
Consulting Group, and Weinstein Radcliff  
Pipkin LLP*

1:15-5:00 p.m. Continuation of “Defense Wins Championships: Strategies and Ethics as Spearin Approaches  
100”

5:15 p.m. Welcome Reception/Dinner  
*Hors d’oeuvres hosted by Stewart Sokol & Larkin, LLC; Dinner hosted by Watt, Tieder, Hoffar  
& Fitzgerald, LLP, and J.S. Held LLC*

7:00 p.m. Hold ‘Em Tournament – *sponsored by Benchmark Consulting Services, LLP and  
Weinstein Radcliff Pipkin; drinks sponsored by Krebs Farley, PLLC*



## **Friday, September 8**

### **Columbia Winery -- Woodinville, WA**

- 7:30 a.m. Breakfast Buffet  
*Hosted by Cashin Spinelli Ferretti LLC, and  
Snow Christensen & Martineau*
- Bloody Mary Bar  
*Hosted by SMTD Law LLP*
- Beverage Service  
*Hosted by Guardian Group, Inc.*
- 8:30 a.m. Seminar – “Delivering the Promise” panel discussions
- 12:00 a.m. Lunch – On Your Own



### **Harbour Pointe Golf Club -- Mukilteo, WA (www.harbourpointegolf.com)**

- 12–12:30p.m. Bus service to/from golf course  
*Hosted by Law Offices of Larry Rothstein*
- 1:00 p.m. Sign In/Warm Up  
*Golf hats provided by RJT Construction*
- 1:30 p.m. Scramble Tournament – Shotgun Start
- Beverage Cart  
*Hosted by Watt Tieder Hoffar & Fitzgerald, LLP,  
Benchmark Consulting Services, LLC, and  
The Sutor Group*
- 6:30 p.m. Dinner  
*Hosted by Chiesa Shahinian & Giantomasi, P.C. and  
Ward Hocker Thornton, PLLC*
- Bar  
*Hosted by Stewart Sokol & Larkin, LLC*
- 8:30 p.m. Awarding of Golf Prizes/Closing Remarks



## **Saturday, September 9 – Elective Events**

### **Woodinville Valley Wine Tour**

This exclusive wine tour will have you meandering through the lush Sammamish River Valley where celebrated and critically acclaimed wines are produced in 40 different wineries, all within 30 minutes of Seattle.

*Sponsored by Torre Lentz, J.S. Held LLC, and Clark Consulting*



### **Horse Racing at Emerald Downs**

Enjoy a day at the races at Emerald Downs race track in Auburn, WA. Transportation is on your own, but once there you will enjoy hosted beverages and food. Doors open at 12:00PM with race time at 2:00PM. There is also a new casino located at the track. Enjoy your risk management skills at this new and exciting event!

*Sponsored by SMTD Law, LLP and Jennings Haug & Cunningham, LLP*





## **SPECIAL THANKS**

While we are extremely indebted to our past participants whose support has allowed us to continue and grow this event, the Board would like to extend a special “thank you” to the management and employees of Liberty Mutual Surety, the consulting firms of Vertex Engineering Services, Source HOV, and Fasano Acchione & Associates, as well as the law firms of Watt, Tieder Hoffar & Fitzgerald, LLP and Sedgwick, LLP who generously commit/authorize resources to promote the Pearlman objective of enhancing the educational opportunities for surety professionals.

Additionally, we would like to recognize our Sustaining Members whose generosity has facilitated both the enhancement of the educational program and the awarding of thousands in scholarship funds to deserving surety professionals.

|  |                                      |
|--|--------------------------------------|
| Fasano Acchione & Associates, LLC            | Watt Tieder Hoffar & Fitzgerald, LLP |
| Wolkin Curran, LLP                           | Benchmark Consulting Services, LLC   |
| Surety & Construction Consultants, Inc.      | Stewart Sokol & Larkin, LLC          |
| J.S. Held, LLC                               | Kerr, Russell and Weber, PLC         |
| The Husted Law Firm                          | Sage Associates, Inc.                |
| Booth, Mitchel & Strange, LLP                | Snow, Christensen & Martineau, PC    |
| RJT Construction, Inc.                       | Roberts, Taylor & Sensabaugh         |
| Alber Frank, PC                              | Chiesa Shahinian & Giantomasi P.C.   |
| Guardian Group, Inc.                         | Forcon International Corporation     |
| Torre, Lentz, Gamell, Gary & Rittmaster, LLP | Langley, LLP                         |
| Jennings, Haug & Cunningham, LLP             | Global Construction Services, Inc.   |
| Simon, Peragine, Smith & Redfearn, LLP       | SMTD Law LLP                         |
| Sage Consulting Group, Inc.                  | Manier & Herod                       |
| Coats Rose, P.C.                             | Cashin Spinelli & Ferretti, LLC      |
| JAMS   | Strasburger & Price, LLP             |
| Krebs, Farley, PLLC                          | Law Offices of John L. Fallat        |
| Ward, Hocker & Thornton, PLLC                | Clark Consulting Group               |
| PCA Consulting Group                         | Ernstrom and Drete, LLP              |
| Wright, Constable & Skeen, LLP               | Robinson & Cole, LLP                 |
| Jennings, Strouss & Salmon, PLC              | Berkeley Research Group, LLC         |
| Weinstein Radcliff Pipkin, LLP               | Koeller Nebeker Carlson Haluck LLP   |
| Matson, Driscoll & Damico                    | Bierhalter & Associates              |
| Vertex Engineering Services, Inc.            | Williams Kastner                     |

# PEARLMAN 2017 -- Registration Form

\_\_\_\_\_  
Name

\_\_\_\_\_  
Firm/Company

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
E-Mail

\_\_\_\_\_  
Name of Additional Guest

## Wednesday, September 6

Hospitality Reception – Willows Lodge

Additional guest will be attending

## Thursday, September 7

Seminar – Columbia Winery

Dinner -- Columbia Winery

Additional guest will be attending

Hold ‘Em Tournament -- Columbia Winery

Additional guest will be participating

## Friday, September 8

Seminar – Columbia Winery

Scramble – Harbour Pointe Golf Club transportation: party bus to/from golf course – Y / N

Additional guest will be participating

Handicaps: Attendee -- \_\_\_\_\_; Additional Guest -- \_\_\_\_\_

Rental Clubs Needed -- \_\_\_\_\_ Left Handed; \_\_\_\_\_ Right Handed

Dinner – Harbour Pointe Golf Club

Additional guest will be attending

## Saturday, September 9 -- Elective Events (select one)

Horse Racing @ Emerald Downs

Additional guest will be participating

Woodinville Valley Wine Tour

Additional guest will be participating

**REGISTRATION FEES:** Registration fees will entitle the registrant to participate in all of the Pearlman events. Greens fees and carts will be paid for by Pearlman. There is no fee for the Hold ‘Em Tournament.

Surety Company Representative      Waived

Sustaining Member – before 08/14/17    \$ 600

General Attendee – before 08/14/17    \$ 725

Sustaining Member – after 08/14/17    \$ 650

General Attendee – after 08/14/17    \$ 775

**MAIL:**      Pearlman Association  
                  Attn: Lih Hudson  
                  P.O. Box 34670  
                  Seattle, WA 98124

**FAX:**      (866) 548-7321

**E-MAIL:**    [Lih.Hudson@libertymutual.com](mailto:Lih.Hudson@libertymutual.com)

Please make all checks payable to  
**Pearlman Association.**

Tax ID No. is 20-1484989.

**Please register by  
Friday, August 18, 2017.**

Application is being made for CLE credits which will be announced during the event.



## **HOTEL INFORMATION**

The Pearlman Association has reserved the Willows Lodge which is conveniently located near each event. Willows Lodge offers a host of civilized comforts, including a full-service spa and two highly-rated restaurants— The Herbfarm Restaurant and the Barking Frog.

Due to its popularity, the Lodge is currently sold out; however, you may place your name on a waiting list. To make your reservation, you may call the Lodge directly at (425) 424-3900 or (877) 424-3930. The reservation rate negotiated for Pearlman attendees is \$289/night on the nights of September 6 and 7, and \$329/night on September 8, 2017.



The Pearlman Association has also reserved a block of rooms at the Redmond Marriott Town Center which is within five miles of the event. The Marriott Town Center offers upscale shopping, restaurants and entertainment.

To make your reservation, you may call the Marriott directly at (425) 498-4000. The reservation rate negotiated for Pearlman attendees is \$219/night.

