

### ***Getting It Right: Document Production for Insurance Professionals***

This is a one- or two- hour seminar that provides a detailed examination of one of the topics touched upon in the CPCU course *The Legal Environment*. Donald O. Johnson, J.D., LL.M. , CPCU developed this seminar to provide insurance professionals with detailed information about the rules governing the judicially-enforced production of paper documents and electronically-stored information. This seminar has been approved for continuing education (CE) credit for brokers and agents in the jurisdiction in which such approval was sought.

This seminar is directed at anyone who works for a company that receives a Request for Production of Documents or a Document Subpoena and is assigned the task of responding to it during an insurance coverage-related lawsuit. The seminar explains:

1. the purpose of the document production rules;
2. the scope of the term "documents," which, in this context, includes electronically-stored information, the inclusion of which increases the complexity of document production;
3. the producing entity's document preservation and document production obligations;
4. where documents that must be produced are likely to exist on computer equipment;
5. which company employees should be contacted to help identify documents that must be produced;
6. objections that the producing entity may be able to make to avoid having to produce requested documents;
7. the potential sanctions that exist for failing to produce requested documents; and
8. attorney-client privilege and attorney work-product issues.

Don presented this seminar to the CPCU Society's Brandywine Chapter in November 2008.