

Brian T. Casey

Partner

Atlanta

brian.casey@troutman.com

D 404.870.4638



Brian leads clients in the insurance, financial services, and health care industries through their most important regulatory and transactional matters, including mergers and acquisitions, corporate and structured finance, and cutting-edge insurtech strategies.

OVERVIEW

With a focus on corporate transactions, mergers and acquisitions, and regulatory compliance, Brian serves a diverse clientele in the insurance, financial services, and health care industries. His clients include insurance companies, insurance holding companies, managing general agents, insurance agencies, third-party administrators, banks, financial institutions, investment banks, and reinsurance companies.

Brian manages regulatory challenges while fostering innovation. His proactive approach helps clients stay ahead of regulatory changes, leveraging opportunities in areas such as digital insurance, blockchain/distributed ledger technology, and artificial intelligence in insurance.

REPRESENTATIVE MATTERS

Transactional Matters

- Represented a leading global insurance company in its \$1.5 billion acquisition of a U.S.-based insurance holding company.
- Advised a major financial services firm in the \$2 billion sale of its life insurance and annuity business.
- Guided a health care services company through a \$500 million merger with a competitor, creating one of the largest entities in the sector.

Regulatory Matters

- Assisted a top insurance company in navigating complex regulatory challenges related to the implementation of blockchain technology in policy administration.
- Provided strategic counsel to a fintech startup on compliance with state and federal regulations for a new digital insurance product.
- Advised a multinational corporation on regulatory issues concerning the use of artificial intelligence in

underwriting processes.

Litigation Matters

- Successfully defended an insurance company in a high-stakes class action lawsuit involving alleged violations of consumer protection laws.
- Represented a financial institution in a landmark case that set a precedent for the treatment of digital signatures in insurance contracts.
- Achieved a favorable settlement for a health care provider in a dispute over reimbursement rates with a major insurance carrier.

AWARDS

- *Best Lawyers in America*®: Insurance Law (2025-2026), Mergers and Acquisitions Law (2025-2026), Reinsurance Law (2025-2025)
- *Chambers USA*: Insurance (2024-2026)
- *Thomson Reuters Stand-out Lawyer* (2025-2026) – independently rated lawyers

TOP AREAS OF FOCUS

- Insurance + Reinsurance
- Insurance Transactional + Regulatory
- Mergers + Acquisitions
- Technology

ALL AREAS OF FOCUS

- Artificial Intelligence
- Corporate
- Digital Assets + Blockchain
- Excess + Surplus Lines
- Financial Services
- Insurance + Reinsurance
- Insurance Distribution + Intermediary
- Insurance Transactional + Regulatory
- Insurtech
- Mergers + Acquisitions
- Privacy + Cyber
- Tax
- Technology

PROFESSIONAL/COMMUNITY INVOLVEMENT

- Member, board of advisors, InsurTech Atlanta
- Member, board of mentors, RevTech Labs

- Demo day judge, Global Insurance Accelerator (GIA)
- Member, American Bar Association
- Member, Law360 Insurance Authority Specialty Lines Advisory Board (2023)
- Member, Institute of Warranty Chain Management (IWCM) Legislation and Public Policy Committee (2006-Present)
- Board of directors, Terrene Labs
- Member, Global Insurance Accelerator
- Board of directors, Life Insurance Direct Marketing Association (LIDMA) (2006-Present)
- Member, Association of Alabama Life Insurance Companies (2002-Present)
- Member, Georgia Federation of Regulatory Counsel (2001-Present)
- Member, Georgia Electronic Commerce Association (GECA) (2000-Present)
- Member, Association of Life Insurance Counsel (ALIC) (2000-Present)
- Member, Technology Association of Georgia (TAG) (2000-Present)
- Member, advisory board, Insurance Studies Institute (ISI)
- Member, Life Insurers Council Laws and Legislative Committee (1995-Present)
- Industry participant, National Association of Insurance Commissioners (NAIC) (1989-Present)

EDUCATION AND CERTIFICATIONS

EDUCATION

- Emory University School of Law, LL.M., 1992
- The Ohio State University Moritz College of Law, J.D., 1987
- Auburn University, B.A., B.S., *summa cum laude*, 1984

BAR ADMISSIONS

- Georgia

SPEAKING ENGAGEMENTS

- Speaker, "Embedded Insurance for InsurTechs," InsurTech Legal Academy, November 19, 2025.
- Speaker, "Financing of Insurance Technology Start-Ups," University of Connecticut School of Law, September 22, 2025.
- Speaker, "Primer on Fair Credit Reporting Act and Insurance Adverse Action Laws for InsurTechs," InsurTech Legal Academy, June 18, 2025.
- Speaker, "Rewriting Risk: The New Rules of Underwriting," FinTech Generations InsurTech, June 11, 2025.
- Speaker, "Managing AI Risk," 2025 CCIA Annual Meeting, April 29, 2025.
- Speaker, "Fourth Annual Warranty & Service Contract Innovations for Vehicle, Home, Smart Products & Consumer Goods," March 27, 2025.
- Speaker, "To Gen AI or Not to Gen AI," Medical Professional Liability Association CEO/COO Conference, February 3, 2025.
- Speaker, "AI, Privacy and Security & Surplus Lines," Atlanta RIMS Chapter EdCo 2025, January 30, 2025.
- Moderator, "What Key Legal and Regulatory Challenges Industry Leaders Are Facing and Doing to Ensure Compliance," 15 Annual Extended Warranty & Service Contract Innovations, September 24, 2024.

- Speaker, “Data Privacy,” SCIC, MVCPPA & GAPA 2024 Annual Conference, September 18-19, 2024.
- Speaker, “Living Up to the Embedded Insurance Promise,” InsurTech NY: 2024 Spring Conference, March 20-21, 2024.
- Speaker, “NAIC Highlights Affecting InsurTechs,” InsurTech Atlanta, March 12, 2024.
- Speaker, “Designing a Compliant Digital Business for Insurance Products,” IASA: Georgia Chapter Fall Event, December 5, 2023.
- Speaker, “Insurance Broker Fees and Insurance Commission Sharing and Referral Fee Payments for InsurTechs,” InsurTech Legal Academy, November 7, 2023.
- Speaker, “How the Life Insurance and Annuity Industry Can Win with Embedded Insurance: The Essential Steps You Need to Take to Achieve Success,” InsurTech Connect, October 31 – November 2, 2023.
- Speaker, “Traps for the Unwary,” SCIC, MVPPA & GAPA 2023 Annual Meeting, October 25-26, 2023.
- Moderator, “Special Markets Roundtable,” 14 Annual Extended Warranty & Service Contract Innovations, October 17-18, 2023.
- Moderator, “General Counsel Roundtable: What Industry Leaders are Doing to Ensure Compliance,” 14 Annual Extended Warranty & Service Contract Innovations, October 17-18, 2023.
- Moderator, Regulator Panel, Digital MGA Lab, InsurTech NY, September 14, 2023.
- Speaker, Global Insurance Accelerator: Accelerate 2023, September 6, 2023.
- Speaker, Data Privacy & Security for InsurTechs, Locke Lord InsurTech Academy, August 23, 2023.
- Speaker, Surplus Lines Insurance for InsurTechs, Locke Lord InsurTech Academy, June 28, 2023.
- Speaker, “Traps for the Unwary: Laws/Regulations You Didn’t Know Affect the Service Contracts Businesses,” Global Warranty & Service Contract Innovations, April 19, 2023.
- Speaker, “InsurTech Landscape: Areas of Investment, Regulation and Innovation,” National Fintech Organization Webinar, March 15, 2023.
- Moderator, Digital MGA Lab, InsurTech NY, September 16, 2022.
- Speaker, “Online Product Challenges & Opportunities: Regulatory View,” Consumer Credit Industry Association Annual Meeting, April 25-27, 2022.
- Speaker, “Technology Influencing the Future of Insurance,” Global Insurance Symposium, April 19-21, 2022.
- Speaker, “Designing a Compliant Digital Business,” Global Warranty & Service Contract Innovations, April 12, 2022.
- Speaker, “InsurTech NY: Startup Pitch Global InsurTech Competition,” March 7, 2022
- Speaker, “Methods of Accessing the Non-Admitted Market in the U.S.,” Southeastern Regulators Association Conference, November 2, 2021.
- Speaker, “Insurance Regulatory Compliance: Best Interest, DUAЕ Ratings, and Pandemic Regulatory Effects,” Locke Lord and Aite-Novarica Group Webinar, October 20, 2021.
- Speaker, “Emerging Regulations Impacting the Extended Warranty & Service Contract Business,” 12 Annual Extended Warranty & Service Contract Innovations, October 18, 2021.
- Speaker, “Understanding Surplus Lines,” APCIA Western Region General Counsel Conference, July 27, 2021.
- Speaker, “Methods of Accessing the Non-Admitted Market in the U.S. and Related Group Insurance Issues,” Association of Insurance Compliance Professionals Gulf States Chapter Education Day, June 29, 2021.
- Speaker, “Methods of Accessing the Non-Admitted Insurance Market in the U.S. for InsurTech Distributors,” Locke Lord and InsurTech NY Webinar, June 9, 2021.
- Speaker, “E-Signatures, FCRA Regulations, and Data Security,” Insurance IT Strategy and Regulatory Compliance, March 24, 2021.
- Speaker, “The Non-InsurTechs – How Technology Focused InsurTechs Are Changing the Face of the Industry Without Selling a Single Policy,” AIRROC Spring Membership Meeting, March 9, 2021.
- Speaker, “Navigating Ever-Changing Data Privacy and Security Laws Applicable to the Extended Warranty and

- Service Contract Business,” 11 Annual Extended Warranty & Service Contract Innovations, October 14, 2020.
- Speaker, “Artificial Intelligence (AI) and Modern Compliance,” AAIS Pulse, September 29, 2020.
- Speaker, “Insurance IT Strategy and Regulatory Compliance: COVID-19, Best Interest Industry Sales Standards, and Third-Party Risk Management,” Locke Lord and Novarica Webinar, July 29, 2020.
- Speaker, “Overcoming Bias in Insurance,” InsurTech NY and NAAIA Event, July 15, 2020.
- Speaker, “Insurance Basics: Life Insurance Products,” LIMRA/LOMA Insurance Basics Series Webinar, June 10, 2020.
- Speaker, “Taking a Fresh Look at E-Signatures, E-Delivery and E-Contracting,” Locke Lord Webinar, April 29, 2020.
- Panelist: “Insurance IT Strategy and Regulatory Compliance: CCPA, Biometric and Generic Information Privacy Laws, and Chatbots,” April 23, 2020.
- Speaker, “Telephone Consumer Protection Act Primer and Update,” Consumer Credit Industry Association Webinar, April 14, 2020.
- Speaker, “Insurance IT Strategy and Regulatory Compliance: NYDFS, NAIC and CCPA, Locke Lord and Novarica Webinar, January 9, 2020.

PUBLICATIONS

- Podcast, “Kicking the Tires on Kentucky: SB 158 and the Add-On Product Revolution,” *Moving the Metal: The Auto Finance Podcast*, May 26, 2026.
- Podcast, “The Road to Regulation: Vehicle Service Contracts Explained,” *Moving the Metal: The Auto Finance Podcast*, August 12, 2025.
- Author, “Automobile Extended Warranty Risk Transfer Agreements: Are They Insurance Policies?,” *Auto Remarketing*, November 18, 2024.
- Co-author, “Compliance Tips on State Automatic Renewal Contract Laws,” *Law360*, February 9, 2024.
- Author, “Ore. Warranty Ruling Complicates Insurance Classification,” *Warranty News*, September 13, 2023.
- Author, “As EVs Surge, Regs For Charger Warranties Remain Murky,” *Law360*, April 4, 2023.
- Co-author, “State Securities Acts Compliance Issues for Tertiary Market Life Settlement Policy Traders,” *The Review of Securities & Commodities Regulation*, December 14, 2022.
- Author, “Why Warranty Providers May Explore CCPA Exemption,” *Law360*, November 16, 2022.
- Author, “New Federal Trade Commission’s Safeguards Rule is a Game-Changer for Extended Warranty and GAP Waiver Industries,” *The Banking Law Journal*, September 2022.
- Co-author, “Financial Services Electronic Signatures and Electronic Records,” Chapter, *FinTech, RegTech, and the Financial Services Industry*, July 2021.
- Author, “Illinois Passes Uniform Electronic Transactions Act,” Locke Lord, June 30, 2021.
- Author, “California’s New Mini-CFPB Law Largely Parallels Its Federal Cousin,” *Insurance Journal*, February 8, 2021.
- Co-Author, “Top Insurance Regulatory Developments of 2020,” *Insurance Journal*, January 26, 2021.
- Author, “Time to Streamline E-Sign Act’s Consumer Consent Process,” *Law360*, August 26, 2020.
- Author, “Ways To Secure Consumers’ Electronic Consent For Data Use,” *Law360*, August 11, 2020.
- Author, “Okla. Ruling Highlights Nuances In Drafting Service Contracts,” *Law360*, June 15, 2020.
- Author, “Changes State Insurance Regulators Are Making For COVID-19,” *Law360*, March 30, 2020.
- Author, “As Companies Seek Alternative Ways to Sign Contracts and Other Records During COVID-19 Pandemic, E-Processes Take Center Stage,” Locke Lord QuickStudy, March 18, 2020.
- Author, “Top 10 Insurance Laws And Regulations Of The Decade,” *Law360*, January 28, 2020.

MEDIA COMMENTARY

- Referenced, "[Profiteers of Death](#)," *Drexel Law Review*, Vol. 17, Issue 3, 2025.