



# Iowa ChapterGram

CPCU Society Iowa Chapter September 2010

[www.cpcu-iowa.org](http://www.cpcu-iowa.org)

## 2010-2011 Officers

---

President:  
 Russ Greenwood  
 (515) 345-2075  
[Russ.E.Greenwood@EMCIns.com](mailto:Russ.E.Greenwood@EMCIns.com)

Vice President:  
 Richard Keith  
 (515) 327-2755  
[Richard.Keith@theimtgroup.com](mailto:Richard.Keith@theimtgroup.com)

Secretary:  
 Connie Doud  
 (515) 237-7389  
[Connie@fmh.com](mailto:Connie@fmh.com)

Treasurer:  
 Erin Osier  
 (515) 223-6998  
[eosier@holmesmurphy.com](mailto:eosier@holmesmurphy.com)

Past President:  
 Barb Sullivan  
 (515) 225-5445  
[Bsullivan@fbfs.com](mailto:Bsullivan@fbfs.com)

## Directors

---

Karen Wassather  
 (515) 508-4580  
[Wassatk@nationwide.com](mailto:Wassatk@nationwide.com)

Dalith Wells  
 (515) 345-2542  
[Dalith.M.Wells@EMCIns.com](mailto:Dalith.M.Wells@EMCIns.com)

Kim Smetzer  
 (515) 365-4340  
[kim.smetzer@marshpm.com](mailto:kim.smetzer@marshpm.com)

Rose Nwaturuocha  
 (515) 508-3386  
[Nwaturr@nationwide.com](mailto:Nwaturr@nationwide.com)

## Contents

|      |  |
|------|--|
| Page |  |
| 2    | Message from the President                                   |
| 3    | Iowa Insurance Hall of Fame                                  |
| 4    | Burkhalter Award   |
| 5    | Burkhalter Award Nomination Form                             |
| 6    | In Memoriam<br>Thanks to our 2010 Golf Outing Sponsors       |
| 7    | Donation to Blank Children's Hospital                        |
| 8    | Certificate of Appreciation<br>Help Wanted                   |
| 9    | 2010-2011 CPCU Events<br>Iowa Chapter Annual Meeting Package |
| 10   | Chapter Meeting  |

## Upcoming Events

|                           |  |  |
|---------------------------|--|--|
| Thursday,<br>September 16 | Wakonda<br>Country Club                    | Topic: Learn about your<br>CPCU Chapter & volunteer<br>opportunities   |
| Thursday,<br>October 21   | Glen Oaks<br>Country Club                  | TBA  |
| Thursday,<br>November 11  | Des Moines<br>Marriott                     | "I-Day"<br>CEO Panel - Kim Austen,<br>Steve Crawford &<br>Bruce Kelley |
| Thursday,<br>December 16  | Holiday Inn &<br>Suites at Jordan<br>Creek | Speaker: Debbie Ladehoff<br>Topic: "Generations at Work"               |

The summer days are quickly departing. The Iowa State Fair has closed, and many schools have begun classes. Our chapter meetings will soon be in full swing. I hope each and every one of you had a safe and enjoyable summer.

I want to thank you all for the honor and privilege to serve as your president of the Iowa Chapter of CPCU this year. In addition, I would like to express my gratitude to Barb Sullivan for her guidance and leadership of the Iowa Chapter of CPCU this past year. I also would like to extend my congratulations to her and the Iowa Chapter. Under her direction, we once again achieved the Gold Level for the 2009-2010 Circle of Excellence Recognition Program sponsored by the National CPCU Society. Through the hard work and dedication of our membership, we once again demonstrated how truly great a chapter we have.



One of the opportunities to help our chapter give back to the community will happen on September 2<sup>nd</sup> from 2:30 to 4:30 at HyVee Hall in Des Moines. We have agreed to supply volunteers to help assemble and package meals for starving people around the world. Please consider helping with this great cause by contacting Jeff Wilson at [jeff.wilson@theimgroup.com](mailto:jeff.wilson@theimgroup.com)

Our New Designee Reception will be held on Thursday, September 9<sup>th</sup> at Raccoon River from 5 – 7 p.m. We invite all our new CPCU designees to come and meet the members of the Iowa Chapter.

Vice-President, Richard Keith, has been busy preparing exciting meetings for this upcoming year. Our first meeting will be held at Wakonda Club on September 16<sup>th</sup> from 3:00 to 4:30p.m. Several speakers will discuss our chapter and volunteer opportunities within the Society. Please mark your calendar to attend.

On behalf of myself, Vice-President, Richard Keith, Secretary, Connie Doud, Treasurer, Erin Osier, and the rest of the board, we are excited about the upcoming year for the Iowa Chapter and encourage all of you to become active in the chapter.

“Success Comes in Cans...”

Joel Weldon, Motivational Speaker

Russ Greenwood, President, Iowa Chapter of CPCU



On May 19, 2010, over 200 people attended the Iowa Insurance Hall of Fame Induction ceremony where 5 people were inducted.



Inductees pictured above from left to right:

- \* Graham Cook, FLMI, Homesteaders Life Company
- \* Dutch Koch accepting for William Koch(deceased), Chairman, National Travelers Life
- \* William Ambrisco, CPCU, Retired Iowa City Independent Agent
- \* Robert Jester, Jester Insurance
- \* Robert Dee, Retired Chairman/CEO, Holmes Murphy



The **Burkhalter Award** is designed to recognize individuals for outstanding contributions to their community and the property/casualty insurance industry in Iowa. This award will be presented at the annual I-Day seminar.

The **Burkhalter Award** is named after Major General Louis D. Burkhalter, Jr. who was the first individual in Iowa to attain the CPCU designation; a charter member of the Iowa Chapter of CPCU; and the first president of the Iowa Chapter. Mr. Burkhalter had a long and distinguished career in the insurance industry, military and civic activities.

### **Nominees for this award will be evaluated based upon the following criteria**

- Promotion of insurance within the business community through civic and non-civic activities
- Achievements beyond primary professional responsibilities
- Innovation within the industry
- Specific achievements which benefit the industry
- Research efforts
- Volunteer work in the industry and community
- Leadership activities in the governmental arena

### **Goals of the BURKHALTER Award**

- Recognize outstanding service to the community and insurance industry
- Give community visibility to the recipient and his/her achievements and contributions
- Generate interest and motivation within the Iowa insurance industry to aspire to this award
- Contribute to the public image and visibility of the Iowa property and casualty insurance industry

### **YOUR NOMINATION FOR THIS YEAR'S AWARD IS ENCOURAGED**

The Iowa Chapter seeks qualified recipients for the prestigious **Burkhalter Award**. If you know of someone who has made an outstanding contribution to our profession and their community, we encourage you to submit a nomination.

To nominate an individual for the Burkhalter Award:

1. Obtain a nomination form...one appears in this newsletter.
2. Complete the form.
3. Return(along with supporting documentation) to:  
Iowa Chapter CPCU Burkhalter Award  
c/o Association Insight  
1255 SW Prairie Trail Parkway  
Ankeny, IA 50015
4. Nomination deadline is October 15th.

# Burkhalter Award Nomination Form

## IOWA CHAPTER CPCU "BURKHALTER AWARD" NOMINATION FORM

### PLEASE TYPE OR PRINT ALL INFORMATION

NAME OF NOMINEE: \_\_\_\_\_

COMPANY/ORGANIZATION OF NOMINEE: \_\_\_\_\_

NOMINEE'S ADDRESS: \_\_\_\_\_

TELEPHONE NUMBER IF KNOWN: ( \_\_\_\_\_ ) - \_\_\_\_\_ - \_\_\_\_\_.

PLEASE INDICATE THE AREA, OR AREAS, OF THE NOMINEE'S CONTRIBUTION:

- CONTINUING EDUCATION**: Advancing the professionalism of insurance through participation and improvement of the instructional process.
- PROMOTING INSURANCE**: Enhancement of the industry within the business community by involvement in either civic or other activities.
- EXTERNAL ACHIEVEMENT**: Voluntary work or accomplishments in the industry or community outside the scope of one's normal job responsibilities.
- RESEARCH EFFORTS**: Activities, which have led, or will lead, to major improvements in the insurance environment such as, but not limited to, published works.
- INNOVATION WITHIN THE INDUSTRY**: Accomplishments that have added to the overall creative excellence of the industry.
- SPECIFIC ACHIEVEMENTS WHICH BENEFIT THE INDUSTRY**: Those milestones specifically targeted to improve the industry's general welfare.
- LEGISLATIVE ACTIVITIES**: Participation in government affairs leading to positive insurance legislation.
- LEADERSHIP**: Providing guidance and direction resulting in a better insurance climate.
- OTHER**: Please specify \_\_\_\_\_

BRIEF SUMMARY OF NOMINEE'S ACCOMPLISHMENTS: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

NAME OF PERSON (NOMINATOR) COMPLETING THIS FORM: \_\_\_\_\_

YOUR ADDRESS: \_\_\_\_\_

PHONE NUMBER: ( \_\_\_\_\_ ) - \_\_\_\_\_ - \_\_\_\_\_.

PLEASE RETURN THIS FORM AND SUPPORTING DOCUMENTATION TO:  
Iowa Chapter CPCU Burkhalter Award  
c/o Association Insight  
1255 SW Prairie Trail Parkway  
Ankeny, IA 50015

Deadline for submission: October 15th

[www.cpcu-iowa.org](http://www.cpcu-iowa.org)

### Brian Hart, CPCU, our 35th President, Dies at age 59.

On June 19, 2010 Brian P. Hart passed away in Montgomery Texas after a two year battle with cancer. Brian graduated from the University of Northern Iowa in 1973. That year he went to work for Hawkeye-Security Insurance Company and was employed there until 1986, when he left the insurance industry and, with his wife Ellen, formed the Business and Banking Institute. In 1997 he began working with a Dallas, TX based firm, Generational Equity where he was employed at the time of his death.



Brian received his CPCU designation in 1979 and was the Iowa Chapter president for the 1986-87 year.

## Thanks to Our 2010 Golf Outing Sponsors

On June 11<sup>th</sup> the Central Iowa CPCU Chapter held their annual golf outing at Copper Creek. The event had a good turnout with over 60 people participating. We would like to thank everybody who participated along with those who helped in the 2010 Golf outing.



We would also like to recognize our corporate sponsors for their generous donation to the 2010 CPCU Golf Outing.

**EMC Insurance Cos.**

**Iowa Insurance Hall of Fame**

**Brooks-Lussem-Clem Insurance**

**EMC National Life Co.**

**FBL Financial Group**

**IMT Insurance Co.**

**Grinnell Mutual Ins.**

**Guideone Insurance**

**Continental Western Group**

**CHUBB Federal Insurance**

The combination of individual participants and corporate sponsors enabled the Iowa Chapter of CPCU's to donate \$1,350 to the Blank Hospital Fire Safety House. We received the following thank you from Blank Children's Hospital.

Dear Central Iowa Chapter CPCU Members,

On behalf of the Fire Safety House Program at Blank Children's Hospital, I want to thank you for your generous donation to the program. The Fire Safety House is a wonderful tool that allows firefighters and trained volunteers to teach children how to prevent and safely escape a fire. In 2009, the Fire Safety House went to 65 events in schools and communities statewide, educating 5,352 children and 745 adults. With this many children utilizing the Fire Safety House each year, the repairs on the trailer are an ongoing process. We pride ourselves in providing this educational tool. Your donation will help us to continue keeping it in great condition and providing this service to local communities and schools for years to come.

Thank you, again. We sincerely appreciate your support.

Kindest Regards,  
Kylie Davidson



Brian Wright, Golf Event Chair, and Russ Greenwood, President of Iowa Chapter of CPCU, presenting a check to Kylie Davidson & Linda Plummer from Blank Children's Hospital.



As announced by Society President, Douglas J. Holtz, CPCU in January, the Society has designed the 2010 Chapter Membership Incentive Program. They are recognizing chapters' achievements in two areas: General membership retention; and conversion of the 2009 New Designees to membership. There were several levels in each category based on chapter size or new designee class size.

In May, the Society notified Barbara Sullivan, last year's Iowa Chapter President, that the Iowa Chapter is the 2nd place winner in the General Membership category for Jumbo/Large Chapters. The following Certificate of Appreciation was given to the Chapter for our achievement.



### *Certificate of Appreciation*

Presented to the

## ***Iowa Chapter***

*for Achievement in 2010 Membership Retention*  
**2nd Place - Jumbo/Large Chapters**

  
Douglas J. Holtz, CPCU, CIC, ESP  
CPCU Society President and Chairman

  
James R. Marks, CPCU, CAE, AIM  
Chief Executive Officer

## Help Wanted

Do you enjoy golf? The Iowa CPCU chapter is looking for a co-chair for next year's Golf Outing. This position is a great way to get involved and to "mingle with the crowd". It's fun and easy! If interested, please contact either Russ Greenwood (phone 345-2075 or email [Russ.E.Greenwood@EMCIns.com](mailto:Russ.E.Greenwood@EMCIns.com)) or Brian Wright (phone 345-2686 or email [Brian.W.Wright@EMCIns.com](mailto:Brian.W.Wright@EMCIns.com)) about this position.



## 2010-2011 CPCU Events

|  |                                      |   |
|--|--------------------------------------|---|
| Thursday, September 16, 2010<br>3:00-4:30    | Wakonda Country Club                 | Topic: Learn about your CPCU Chapter and volunteer opportunities  |
| Thursday, October 21, 2010<br>7:30-9:00am    | Glenn Oaks Country Club              | Speaker: TBA  |
| Thursday, November 11, 2010<br>8:00am-2:00pm | Des Moines Marriott                  | "I-Day"<br>CEO Panel—Kim Austen, Steve Crawford, and Bruce Kelley |
| Thursday, December 16, 2010<br>11:30-1:00    | Holiday Inn & Suites at Jordan Creek | Speaker: Debbie Ladehoff<br>Topic: "Generations at Work"          |
| Thursday, January 20, 2011<br>11:30-1:00     | Botanical Center                     | TBA   |
| Thursday, February 17, 2011<br>11:30-1:00    | Des Moines Club Grille Room          | Speaker: Charlie Kingdollar, General Reinurance Corporation       |
| Thursday, March 24, 2011                     | TBA                                  | Ethics day  |
| Thursday, April 21, 2011<br>11:30-1:00       | Des Moines Blank Zoo                 | Speaker: Adrian Lund, Insurance Institute for Highway Safety      |
| Thursday, May 19, 2011<br>7:30-9:00am        | Des Moines Golf & Country Club       | Speaker: Jeff DeTurris, ISO (Insurance Service Organization)      |

## Iowa Chapter 2010-11 Annual Meeting Package

**Package Includes:** All Monthly Chapter Meetings & I-Day.

**Cost:** \$200.00 for the Annual Package. That is a \$25.00 discount for paying in advance.

**Deadline:** September 10, 2010.

Make checks payable to Iowa Chapter CPCU and send them to:

Iowa Chapter CPCU  
c/o Association Insight  
1255 SW Prairie Trail Parkway  
Ankeny, IA 50015

**Note:** The annual meeting package does not include the Ethics Seminar in March, or any Technical Seminars or National Leadership Institute (NLI) seminars that are unscheduled at this time.

# Chapter Meeting

|             |   |
|-------------|---|
| Date & Time | Thursday, September 16, 2010, 3:00 p.m.                               |
| Location:   | Wakonda Country Club  |
| Speakers:   | Michael Jagadich, State Farm, Lincoln, NE - Ted Lussem - Jody Ochsner |
| Topic:      | "Learn about your CPCU Chapter and volunteer opportunities"           |

## DESCRIPTION:

Ted Lussem will present a brief history of the chapter. Jody Ochsner will review the different chapter committees. Michael Jagadich is an incoming CPCU Governor and he will describe the different ways to volunteer at a national level. We have scheduled this at a time everyone can get together and meet.

To enable us to have an accurate count for food purposes, please mail or e-mail reservations by September 10, 2010 to:

[cpcu-iowa@associationinsight.com](mailto:cpcu-iowa@associationinsight.com)

Make checks payable to: Iowa Chapter – CPCU

Mail checks to: Iowa Chapter CPCU  
c/o Association Insight  
1255 SW Prairie Trail Parkway  
Ankeny, IA 50015

Name(s): \_\_\_\_\_

Company: \_\_\_\_\_ Total Enclosed: \$ \_\_\_\_\_  
Cost: \$25 per person

To register by credit card go to our chapter's web site ([www.cpcu-iowa.org](http://www.cpcu-iowa.org)) and click on the link on the main page under News and Hot Topics.

For questions about the meeting, not concerning reservations, please call Richard Keith at 515-327-2755.