



**2001-2002
Officers**

President:

Judy Brannon
(515) 267-5346
jbrannon@guidemail.com

Vice President:

JoAnn Olson
(515) 225-5931
jaolson@fbfs.com

Secretary:

Dennis Forsythe
(515) 226-6702
dforsythe@fbfs.com

Treasurer:

Nancy Green
(515) 280-2850
nancy.d.green@emcins.com

Past President:

Bob Conroy
(515) 267-5980
bconroy@guidemail.com

Directors

Kevin Seward
(515) 225-5699
kseward@fbfs.com

Wade Sheeler
(641) 236-6121 x4565
wsheeler@gmrc.com

Dan Crew
(515) 362-7513
dan.c.crew@emcins.com

Barb Sullivan
(515) 225-5445
bsullivan@fbfs.com



CPCU Society Iowa Chapter

May 2002

www.cpcu-iowa.org

MESSAGE FROM THE PRESIDENT.....

As we end this CPCU year, a big thank you to the officers, directors and committee chairs who served the Chapter this year. Your time, energy and commitment to the Chapter are appreciated by all of us.

Congratulations to next year's officers:

JoAnn Olson, President
Dennis Forsythe, Vice President
Nancy Green, Secretary
Jeff Baker, Treasurer

Dan Crew, Director (2 years)
Barb Sullivan, Director (2 years)

These officers will be installed at our May 22 dinner following the golf outing.

Also on May 22, we will recognize **Ted Lussem** for 25 years and **Sam Waters** for 15 years of teaching CPCU and IIA courses. We will also honor **Grinnell Mutual, Farm Bureau** and **Bruce Kelley** by presentation of CPCU Excellence Awards.

At the end of a year, its always good to reflect on our accomplishments. Highlights this year include educational events for our members, support of insurance education and new CPCU designees, activities designed to raise awareness of the CPCU designation, and good works.

- I Day focusing on e-commerce and technologies affecting business with Society national president John Reynolds conferring our new designees
- 50th anniversary celebration in January
- Governor Vilsak proclaiming 1-25-02 to be CPCU Society Day in Iowa
- March Seminar, "Ethics & More" co-sponsored with Drake University's Kelley Insurance Center
- Technical insurance, Career development and Leadership topics at monthly meetings
- Insurance Commissioner Terri Vaughan speaking on the impli-



Judy Brannon

- cations of September 11
 - The start of monthly CPCU trendsetters column, featuring local CPCUs who have contributed to our Chapter and the industry
 - Study groups led by Ted Lussem in ARM-P and AIS
 - Two Drake Scholarships awarded
 - Receptions to recognize new designees
 - Our first "candidate members" - completers of 5 or more parts who choose to join the chapter
- (cont'd. on page 2)

Message from President
cont'd. from page 1

- Candidate Development program on the changes to the CPCU curriculum
- Iowa reception at the Society's Annual Meetings
- CPCU booths at Independent Insurance Agents of IA and NAIW's Region V conference
- Ads run in the paper about I-Day, our anniversary and insurance fraud
- Chapter match of members' donations, resulting in a \$1000 contribution to Red Cross following 9-11
- Support of the Fire Safety Trailer
- Golf day fundraiser with proceeds donated to Farm Safety 4 Just Kids
- Application for recognition at the Gold Level for the Society's Circle of Excellence Award

After four years as an officer in this Chapter, I'm looking forward to next year, when I plan to sit back and dispense wisdom as Past President! Seriously, its been a fun four years, made so by association with a great group of fellow officers, directors, committee chairs and members, who made it all very easy. I wouldn't have missed it for anything! Have a great summer!

Open Positions

Have you been a CPCU for a number of years, but never been actively involved? Are you a new CPCU and want to know more about our Chapter? Now is the time for you to become an 'active' member of the Chapter. There are currently some open positions that need to be filled. To learn more about the open positions, please contact JoAnn Olson at 225-5931, jaolson@fbfs.com.

SURVEY

The membership survey is up and running. Please be sure to go to the Chapter's website (www.cpcu-iowa.org) and complete it. Your opinion counts!!

CIC Celebrates 25 Years in Iowa

The Iowa Chapter of CPCU extends its heartiest congratulation to the Society of CIC on its 25th anniversary of offering educational programs in Iowa. The Society currently has 782 participants in Iowa, with 355 of these individuals holding the CIC designation.

Dr. William T. Hold, CPCU, CLU, CIC, founder of the CIC program, will be in Des

Moines on August 1st to confer the designation of the 2002 Iowa class and to help celebrate the 25th anniversary.

The CIC program was founded in 1969. Currently there are over 25,000 individuals nationwide holding the CIC designation.

Speak-Off Winner!

Jennie LeGates, CPCU, ARM, CPIW, DAE was the Region V representative at the National Association of Insurance Women (NAIW) annual meeting. She recently won the Communicate With Confidence "speak-off".

The contest was held in conjunction with the 2002 Region V 58th Annual Conference held in Des Moines April 4th through April 7th. Jennie had won the state contest in Davenport on October 13th before progressing into the regional arena. She will represent the region at the national NAIW convention in Alaska later this year.

Jennie is also the currently the Career Management Resources committee chairman on the Iowa CPCU Society board. Congratulations Jennie!

Be sure to check out the Iowa Chapter's website at <http://www.cpcu-iowa.org> for updates on the meetings, directors, officers, and chairs list, past ChapterGrams and other news.

New Designees

Congratulations to Anthony P. Farrell, Nationwide and Michael D. Fitzpatrick, Farmers Insurance Group as new designees from December. All new designees for this year will be receiving an invitation to the Golf Outing and Dinner at Willow Creek on May 22nd.

Fire Safety Trailer

Get out your planners and pencil this in! The Fire Safety House (Smoke Trailer) is back for the season--helping teach lower elementary children how to safely handle escaping and notifying authorities in case of a fire.

The West Des Moines Fire Dept. is counting on 3 - 4 volunteers (that's us) to help with each site. If you cannot stay for an entire session, that's OK. Remember that coworkers and family members can also help. The department asks that we arrive about 20 minutes prior to start time.

Please call Pam Heilskov at (515) 280-2951 or e-mail at "pam.j.heilskov@emcins.com". The sooner you call, the better so we can be sure to have someone to cover each session. The firemen were so appreciative of our offer to help, we don't want to let them down.

For the unscheduled schools, we will e-mail those times to our company contacts to circulate to their employees.

SMOKE TRAILER SCHEDULE FOR WEST DES MOINES FIRE DEPT.

<u>DATE</u>	<u>TIME</u>	<u>SCHOOL</u>
May 13 th , 2002	TBA	Clegg Park Elementary 1020 – 8 th St. (WDM)
May 14 th , 2002	TBA	Rex Mathes Elementary 1401 Vine St. (WDM)
May 15 th , 2002	TBA	Phoenix Elementary 415 – 7 th St (WDM)
May 16 th , 2002	9:00-9:45 9:50-10:35	Sacred Heart Elementary 1601 Grand (WDM)
May 17 th , 2002	TBA	Saint Francis Elementary 7075 Ashworth Rd. (WDM)
May 20 th , 2002	9:00-9:45 9:45-10:30 10:30-11:15 11:15-12:00	Westridge Elementary 5500 E P True Pkwy (WDM)
May 21 st , 2002	9:00-9:45 9:45-10:30 10:30-11:15	Crossroads Park Elementary 1050 – 50 th St. (WDM)
May 22 nd , 2002	9:00-9:45 9:45-10:30 10:30-11:15	Western Hills Elementary 600 – 39 th St. (WDM)
May 23 rd , 2002	TBA	Fairmeadows Elementary 807 – 23 rd St. (WDM)
May 24 th , 2002	12:30-1:15 1:15-2:00 2:00-2:45 2:45-3:30	Jordan Creek Elementary 4105 Fuller Rd. (WDM)

Trendsetters

Bruce Kelley, CPCU, CLU, and current President and CEO of EMC Insurance Companies, lives his philosophy of making his world a better place. Through fundraising and preservation activities, he insures better conditions for future generations. He recently spearheaded a drive that raised over \$1 million for refurbishing the local Boy Scout camp. In the late 1980s, Kelley realized that the Salisbury House would be lost to the neighborhood and the community as a whole, so he helped set up the foundation that ultimately saved Salisbury House for the Des Moines community.

Kelley's background in politics and history, plus his community contacts, has given him a unique position to help when he sees a need. He does give credit to the Company for supporting his efforts. EMC, as a mutual company, has historically supported community betterment. But, individuals "should not ignore the community; they should make it a better place—for everyone."

On a more personal note, Kelley's undergraduate degree from Dartmouth was in government and history. He followed that with a law degree from the University of Iowa, School of Law. His family includes his wife, Susy, an 11-year old daughter, and twin 16-year old sons. Favorite non-work activities are tennis, reading, and politics. Kelley considers balancing work and family among his most personally satisfying accomplishments.

Bruce feels he has been given "great opportunities" and is pleased with what he has been able to do with them. He is pleased also with where he is in his career. To new designees or insurance personnel considering the CPCU program, he wants them to know two things: First, how surprised they might be with how fascinating and complex the insurance industry is; and second, how many opportunities the industry offers. There is a long learning curve, but it will be well worth their efforts to stay with the program.

Revised CPCU Curriculum

Want to learn about the 2003 revisions to the CPCU program?

Sandy Masters, CPCU, AIS, CPIW, Director Midwestern Region, American Institute for CPCU/ Insurance Institute of America, will talk about the changes and answer questions. CPCU's and anyone interested in CPCU are welcome. Invitations have been mailed to active CPCU candidates and completers of certain IIA series: INS, AIC, AU, API. There is no cost for the program, but we would appreciate an RSVP so we know how many people to expect.

When: May 23, 3:00 p.m.

Where: Holmes Murphy & Associates, 3001 Westown Parkway, West Des Moines

RSVP: Khrissy Zepeda, Ahrold Fay & Company, 515 288-2101 or kzepeda@ahroldfay.com

Sponsored by the Candidate Development Committee

Questions to: John Ahrold 288-2101 jahrold@ahroldfay.com
 Judy Brannon 267 5346 jbrannon@guidemail.com
 Cindy Adams 223-6888 cadams@holmesmurphy.com

ISO BOP and CGL

Hear about the revised ISO BOP and CGL forms direct from ISO's Gary Grassman, Assistant Vice President for General Liability. Mark your calendars now and watch future ChapterGrams for additional information.

October 11
8 a.m. to 12:00 noon
Parents Hall
Olmsted Center
Drake University

Applying for CE credits

CPCU Mentors Needed

If you attended the April meeting, you heard Rowena Crosbie's informative talk about mentoring. We need some CPCUs to mentor new designees.

What does this mentor do? Get to know the new designee, introduce him or her to other CPCUs, explain how the chapter works, answer questions about the chapter, etc. New designees who request a mentor are matched with one.

If you would be willing to get to know and help a new designee, contact Jennie LeGates. jle-gates@gmrc.com

This is a great way to help bring new CPCUs into the Chapter, and who knows – you might make a new friend.

Go to www.cpcu-iowa.org and complete the Membership survey.

Breakfast Meeting—Officers, Directors and Committee Chairs

Please mark your calendars now for a Officers, Directors, and Committee Chairs breakfast scheduled for May 22nd at 7:30 a.m. at the Valley West Inn.

Our guest for breakfast will be Ron Arthur, Chapter Services Manager with the CPCU Society.

Ron will be conducting an OSCAR (On Site Chapter Activities Review) at the breakfast meeting. The purpose of the OSCAR visit is to assist our chapter in our endeavors, make us aware of the services available from Malvern and share ideas and gain valuable feedback on Society services. During the visit, we should come prepared to discuss areas of member involvement, continuing education and candidate development as well as conducting efficient chapter programs.

This will be an excellent opportunity to assist us as we plan our next CPCU year for our chapter. I hope you can all attend.

The Chapter's condolences go to the family of Charles J. Smith. Charles passed away on March 31, 2002, as a result of complications from a stroke. Charles received his CPCU in 1950 and was one of the 10 Charter Members of the Iowa Chapter. He was the first Vice-President and the second President of the Iowa Chapter of CPCU. He owned his own independent agency, Allied Agencies Inc. from 1946 to 1969 when it was sold to Holmes Murphy and Associates. Charles retired in 1978. Charles was the President of the Independent Insurance Agents of Iowa in 1955 and was named agent of the year in 1963 by the Independent Insurance Agents of Iowa. In addition, he was the President of the Independent Insurance Agents of Des Moines in 1948. Charles made a number of contributions to the insurance industry and will be missed.

Hall of Fame

The votes are in and the new inductees include "one of our own", Margaret Ball, CPCU, AU, AMIM, AIM, ARe.

The new members and their affiliations are as follows:

Margaret A. Ball, EMC Insurance Companies
Lawrence G. Keeney, President, Grinnell Mutual Reinsurance
Co. (deceased)
Larry L. Vander Tuig, Executive Director, Independent
Insurance Agents of Iowa
James B. West, Attorney, Nymaster Goode Law Firm

The induction ceremony will be held on May 23rd starting at 5:30 PM at The Olmsted Center at Drake University. The cost is \$25 and business dress is requested.

Reservations should go to:

Jackie Miller, Miller & Fidler Insurance Agency,
P O Box 65007, West Des Moines, Iowa 50265,
Phone (515) 223-6757, FAX (515) 223-5344

For additional information, Contact Jeff Jeffus at (515) 471-3879
