



Iowa ChapterGram

CPCU Society Iowa Chapter

February 2003

www.cpcu-iowa.org

2002-2003 Officers

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MESSAGE FROM THE PRESIDENT. . . .



The beginning of a New Year typically means a time for resolutions. It's time to set out on those goals that you didn't quite get accomplished in the past year. Many resolutions revolve around personal health and well being. Shedding those pounds added over the holidays, eating healthier and getting back in shape. I've certainly noticed increased

activity this past month at our wellness facility and I'm in my typical mode of 'paying' for the lack of exercise and the over indulgence of the great holiday foods.

Another set of resolutions often revolves around mental well being or improving professional skills. How many of you feel you possess all of the skills to make you successful in your professional lives? I think we all recognize areas we'd like to improve on or new needs we have due to changes in job responsibilities.

Thanks to **Jennie LeGates** for an excellent January program on presentation skills. For many people, public speaking is their greatest fear. Her tips on using power point to create presentations with pizzazz offered useful information for me to put to use immediately. In fact, I headed back to the office and revised a power point presentation I had put together based on her tips!

Another professional enrichment opportunity available to CPCUs is the National Leadership Institute. The National Leadership Institute programs were developed several years ago to provide training in business skills for insurance people. Participants at the CPCU Society National Leadership Institute receive leadership training **for** financial services professionals **by** financial services professionals. Just four NLI seminars will earn you the NLI Certificate of Completion. The NLI is offered twice each year – at the Annual Meeting in the fall and at the Leadership Summit in the spring.

The Leadership summit is scheduled for May 8th & 9th in Tampa, Florida.

Courses included in the certificate program are:

- Practical Techniques in Project Management
- Effective Communication Skills
- Facilitative Leadership Skills
- Finance for Non-financial Managers
- Developing Resilience in a Rapidly Changing World

Other workshops include:

- Performance Coaching
- Negotiation and Conflict Resolution Skills
- Time Management
- DiSC Personal Profile

Registration materials for NLI should be arriving soon.

Don't forget about two events we have scheduled in February. A workshop will be held on February 18 on Additional Insured and Certificate of Insurance Issues and our Chapter meeting will be held on February 20 and the meeting topic will be Special Investigation Units. Hope to see you there.

Future Meeting Dates, Location and Topic

February 18, 2003	Farm Bureau	Workshop—Additional Insured and Certificate of Insurance Issues
February 20, 2003	Wakonda Club	Special Investigation Units
March 6, 2003	Olmsted Center Drake University	Spring Seminar
April 17, 2003	Des Moines Golf & CC	Leadership
May 15, 2003	EMC Insurance Companies	Installation of Officers Guest Speaker: Terri Vaughan
June 12, 2003	Legacy Golf Club Norwalk, IA	Golf Outing

**CPCU Society Workshop
Additional Insured and
Certificate of Insurance Issues
February 18, 2003
Farm Bureau
West Des Moines, IA**

The CPCU Society's Iowa Chapter is sponsoring a half-day workshop on February 18, 2003 from 8:00-11:45. The workshop will be held at Farm Bureau, 5400 University Ave., West Des Moines, IA. The speaker is Donald S. Malecki, CPCU. Donald is chairman and CEO of Donald S. Malecki & Associates, Inc., an insurance and risk management consulting firm. He is also the president of Malecki Communications Company, the publisher of *Malecki on Insurance*, a monthly newsletter on commercial insurance subjects. Donald has worked in the insurance and risk management business for more than 43 years as a broker, consultant, insurance technician, author, architect-historian, teacher, underwriter, claims consultant, and one who drafts insurance policies.

If you are interested in signing up and need a registration form, please contact Barb Sullivan at 515-225-5445 or bsullivan@fbfs.com. There is a group discount of 15% to organizations registering three or more employees at the same time. The workshop has been approved for 3 CE credits as well as 3 CPD credits and one does not need to be a CPCU to attend.



New Designees—Class of 2002

**Iowa Chapter of CPCU
Scholarship Application**

Scholarship Amount: **\$1,500** toward tuition during recipient's sophomore, junior or senior year. Amount may be applied to spring, summer or fall tuition.

Eligibility:

- a. Iowa Chapter of CPCU members or one of their dependents; and,
- b. Sophomores, Juniors or Seniors attending a four-year accredited college or university in the state of Iowa; and,
- c. Maintaining an overall G.P.A. of at least 2.75 on a 4.0 scale.

Preference will be given to students majoring in business an/or an insurance related area of study.

Applicant Name: _____

Mailing Address: _____

City/State/Zip Code: _____ Phone: _____

Year in school: Sophomore / Junior

Major: _____ Minor: _____

Grade Point Average: _____ Anticipated Graduation Date: _____

***Please complete and return this form and the following information by
Wednesday, February 5, 2003:***

- 1. A resume´ that includes information regarding applicant's scholastic honors, extracurricular activities, employment history and other information you believe are important for consideration.
- 2. A statement explaining your career goals and your thoughts about why you are deserving of consideration for this scholarship award. Also, if you are majoring in or have an emphasis in insurance, please explain your interest in that career path.

Please mail the completed application, resume´ and statement to:

Dan Crew, CPCU
Director of Community Development
Iowa Chapter of CPCU
717 Mulberry Street
Des Moines, IA 50309

You may direct questions to 515.362.7513 or dan.c.crew@emcins.com.



Kelley Insurance Center
212 Aliber Hall
29th and University
Des Moines, IA 50311-4505

In cooperation with the
Iowa Chapter, CPCU Society,
Des Moines Association of Insurance and Financial Advisors, and
Society of Financial Service Professionals

DATE: Thursday, March 6, 2003

LOCATION: Parents Hall ♦ Olmsted Center ♦ Drake University

AGENDA:

7:30 — 8:00 A.M.	Registration and Continental Breakfast
8:00 — 9:30 A.M.	Beth Givens
9:30 — 9:40 A.M.	Break
9:40 — 11:10 A.M.	Tracey Vispoli
11:10 — 11:20 P.M.	Break
11:20 — 11:50 P.M.	Cindy Schmell
11:50 — 12:00 P.M.	Break
12:00 — 1:30 P.M.	Buffet Luncheon
12:40 — 1:30 P.M.	Russ Sporer

RESERVATION: You may reserve your place and luncheon by calling (515) 271-2134 by February 27, 2003.

Morning program	\$35
Lunch & noon speaker	\$15**

**** Note: Cost for DMAIFA and SFSP members included in annual dues.**

PARKING: Parking in the Olmsted Lot will be validated at the Registration Table at a cost of \$1.50.

QUESTIONS?

Doug Ireland (515) 271-2134 **Judy Brannon (515) 267-5346** **Lynn Harkin (515) 243-155**
doug.ireland@drake.edu jbrannon@guidemail.com dmaifa@iowaifa.org

ABOUT OUR PROGRAM:

♦ Identity Theft ♦

Beth Givens is the Director of the Privacy Rights Clearinghouse of San Diego, California, and is a nationally recognized expert in issues related to identity theft.
Identity theft — could you be a victim? How can we protect ourselves, our clients, and our insureds.

♦ Risk Management of Cyber Exposures ♦

Tracey Vispoli is an Assistant Vice President, Chubb & Son, Inc., and the global Cyber Solutions Manager in the Department of Financial Institutions.
What should companies know about risk management of cyber exposures? Tracey will discuss fraud in the new economy, myths about cyber risks, quantification of cyber exposures, and gaps in traditional insurance.

♦ It Can Even Happen in Iowa! ♦

Cindy Schmell is the Bureau Chief of the Iowa Insurance Fraud Bureau, Iowa Insurance Division.
Crime doesn't **pay**, but it can certainly **cost** you. Come hear about identity theft in Iowa and some of the latest scams.

LUNCHEON PROGRAM:

◆ Making Ethics Count ◆

Russ Sporer, CPCU, is a principal with NOEL Insurance, Inc., and Past President of the Independent Insurance Agents of Iowa.

Is the term 'business ethics' an oxymoron? Discussion of ethical predicaments of the insurance professional.

Please Note: Application has been made to the Iowa Insurance division for 5 hours of continuing education credit for this seminar—4 hours for the morning session and 1 hour for the luncheon presentation.

CPCU ◆ DMAIFA ◆ SFSP Spring 2003 Special Event Registration Form

Name _____
 Social Security # _____ **[For CE only]**
 Company/Agency _____
 Address _____
 City _____
 State _____ Zip _____
 Phone: Office _____
 Home _____
 FAX _____
 Email _____

I am a member of: **[Check only one]**
 CPCU DMAIFA SFSP DMAIFA & SFSP Unaffiliated

I am registering for: **[Check only one]**

	CPCU & Unaffiliated	SFSP & DMAIFA
Entire Program and Luncheon	<input type="checkbox"/> \$50.00	<input type="checkbox"/> \$35.00
Morning Program Only	<input type="checkbox"/> \$35.00	<input type="checkbox"/> \$35.00
Luncheon and Noon Speaker Only	<input type="checkbox"/> \$15.00	<input type="checkbox"/> \$ 0.00 **

**** No charge for DMAIFA and SFSP members**

Method of payment

Check enclosed — made payable to *Drake University*

Bill my company to the *attention of:* _____

I prefer to pay by credit card

MasterCard Visa Discover

Card #: _____ Exp.Date _____

Return the completed registration form to **Kelley Insurance Center**.

Mail: 212 Aliber Hall, 29th & University Avenue, Des Moines, IA 50311-4505
Fax: (515) 271-2001
Email: Insurance.Center@drake.edu
Phone: (515) 271-2134

IOWA CHAPTER CPCU SOCIETY MEETING

Topic: An Overview of Application and Premium Fraud to Underwriting

Speaker: Paige Blair

Date & Time: Thursday, February 20, 2003 11:30 a.m.

Location: Wakonda Club, 3916 Fleur Drive, Des Moines, IA

Cost: \$18.00 per person

SIU can describe the schemes, show how to recognize the indicators and give examples of the action steps to be taken when fraud is detected and incorporate how it affects claims. Paige Blair is an SIU Specialist with EMC Insurance Companies. She is a Certified Insurance Fraud Investigator (CIFI), and has received the designation of Fraud Claims Law Associate. She has been involved in the insurance industry for 13 years, the last 6 being associated with fraud investigations.

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

To enable us to have an accurate count for food purposes, **please call, fax, or e-mail reservations by February 14, 2003** to:

Jeff Baker
Phone: (515) 237-0106
Fax: (515) 244-9535
E-mail: CPCU@lmcins.com

Make checks payable to: Iowa Chapter – CPCU

Mail checks to: Jeff Baker, CPCU
Lamair-Mulock Condon
808 5th Ave.
Des Moines, IA 50309-1315

Name(s): _____

Company: _____ Total Enclosed: \$ _____
Cost: \$18 per person