



Iowa ChapterGram

CPCU Society Iowa Chapter

September 2005

www.cpcu-iowa.org

2005-2006 Officers

President:
Jeff Baker
(515) 237-0106
Jeff.baker@lmcins.com

Vice President:
Wade Sheeler
(641) 269-8565
Wsheeler@gmrc.com

Secretary:
Kevin Seward
(515) 225-5699
Kseward@fbfs.com

Treasurer:
Jody Ochsner
(515) 280-2456
Jody.L.Ochsner@EMCIns.com

Past President:
Nancy Green
(515) 280-2850
Nancy.D.Green@EMCIns.com

Directors

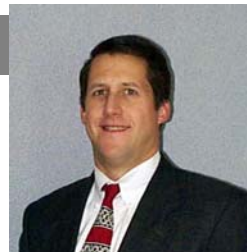
Pat Martin
(515) 267-6615
Pat.martin@fiserv.com

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

Russ Greenwood
(515) 237-2075
Russ.E.Greenwood@EMCIns.com

Sam Waters
(515) 267-5597
SWaters@guideone.com

MESSAGE FROM THE PRESIDENT . . .



Jeff Baker

It is hard to believe we are starting into a new year of chapter activities. The Iowa Chapter of CPCU has a great line up of monthly meetings starting September 8th with a speaker on alternative risk financing mechanisms and captive insurance.

Please make plans to attend some of the monthly chapter meetings this year. Not only has Vice President Wade Sheeler arranged some great speakers for each month, but you also have the opportunity to visit with your peers and keep abreast of the latest news and happenings in the Iowa insurance market. In an effort to draw out some folks who do not regularly attend, we are going to have some **great prize drawings** for cash giveaways or gift certificates to local restaurants or rounds of golf at each meeting. Come on out and get involved in your chapter! There are many ways to serve and the time commitment is what you make it!

Under past president Nancy Green's guidance the Iowa chapter again this year has been selected to the gold level of the national society's "Circle of Excellence". This award is only given to chapters who meet the strict criteria set by the national chapter. Behind the scenes the Iowa Chapter is busy throughout the year. We plan I-Day (held in November), promote ethics, promote the CPCU designation, and conduct community service projects. All of these activities assist us in qualifying for the Circle of Excellence Award.

The Iowa Chapter website **CPCU-Iowa.org** is one of the nation's best and Bob Conroy our webmaster has done a fantastic job of designing and maintaining this site. Here you will find a lot of useful information on the chapter's activities throughout the year.

The Annual CPCU meeting is in Atlanta this year October 21st to 25th. By now you should have received a brochure that details the meetings, speakers and the conferment dinner, as well as sights to see in Atlanta.

On behalf of myself, Vice President Wade Sheeler, Secretary Kevin Seward, Treasurer Jody Ochsner and the rest of the board, we are excited about the new year, and welcome everyone to attend this year's chapter activities.

2005-2006 Officers, Directors, and Committee Chairs

Position	Person	Phone	Email Address	Fax Number
President	Jeff Baker	(515) 237-0106	Jeff.Baker@lmcins.com	(515) 244-9535
Vice-President	Wade Sheeler	(641) 269-8565	Wsheeler@gmrc.com	(641) 236-2838
Secretary	Kevin Seward	(515) 225-5699	Kseward@fbfs.com	(515) 226-6311
Treasurer	Jody Ochsner	(515) 280-2456	Jody.L.Ochsner@EMCIns.com	(515) 280-2975
Immediate Past President	Nancy Green	(515) 280-2850	Nancy.D.Green@EMCIns.com	(515) 237-2016
Director: Member Activities	Russ Greenwood	(515) 237-2075	Russ.E.Greenwood@EMCIns.com	(515) 237-2016
New Designee Rep	Open			
Candidate Development	John Ahrold	(515) 309-6209	Jahrold@ahroldfay.com	(515) 309-6225
Membership	Open			
Golf Event	Open			
Member Involvement	Karen Wassather	(515) 508-4580	wassatk@nationwide.com	(515) 508-4665
Director: Internal Operations	Sam Waters	(515) 267-5597	SWaters@guideone.com	
Circle of Excellence Submission	Open			
Past Presidents' Club	Cerie Garton	(515) 508-5122	gartonc@nationwide.com	(515) 508-2001
ChapterGram Editor	Russ Greenwood	(515) 237-2075	Russ.E.Greenwood@EMCIns.com	(515) 237-2016
Job Description Task Force	Lynette Foster	(515) 267-2315	lfoster@guideone.com	(515) 267-5750
Industry Visibility-Historian	Ted Lussem	(515) 243-4289	Tlussem@brooks-lussem.com	(515) 246-1329
Director: Community Development	Pat Martin	(515) 267-6615	Pat.martin@fiserv.com	(515) 267-6640
Public Relations	Dawn Sassatelli	(515) 508-5297	sassatd@nationwide.com	(515) 508-2001
Web Site Development	Bob Conroy	(515) 267-5980	bconroy@guideone.com	
Good Works	Open			
Photographer	Lloyd Sandbulte	(515) 225-5678	Lsandbulte@fbfs.com	(515) 226-6057
Scholarships	Open			
Iowa Insurance Hall of Fame	Jeff Jeffus	(515) 491-9877	a.jeffus@mchsi.com	
Director: Professional Development	Barb Sullivan	(515) 225-5445	Bsullivan@fbfs.com	(515) 226-6565
Education-Leadership & Career Mgmt	Karen Wassather	(515) 508-4580	wassatk@nationwide.com	(515) 508-4665
Research	Open			
Ethics	Bruce Kelley	(515) 280-2950	Bruce.G.Kelley@EMCIns.com	(515) 280-2895

2005 CPCU Meeting Dates, Locations, and Topics

Thursday, September 8, 2005	Hilton Garden Inn 8600 Northpark Dr. Johnston	Alternative Risk Financing Mechanisms & the Captive In- surance Marketplace—Kate Westover, Vice President Inno- vative Captive Strategies
Thursday, October 20, 2005	Wakonda Club	Scott Kuechler - Gen Re
Thursday, November 10, 2005	Embassy Suites	I-Day
Thursday, December 8, 2005	Temple for Performing Arts	Larry Hersberger, Director of the Vaughan Insurance Institute University of Iowa
Thursday, January 19, 2006	Des Moines Botanical Center	Jewelry Appraisals & Claims Settlement—Max Uhl (Joseph's Jewelers)
Thursday, February 16, 2006	Allied Insurance	Marketing Trends & Contingent Commissions—Jim Hagenbucher, VP Marketing, Allied
Thursday March 9, 2006	Drake University	Ethics
Thursday, April 20, 2006	Blank Park Zoo	Pat Griffin, Dale Carnegie Training
Thursday, May 11, 2006	EMC Insurance	Iowa Workers' Compensation Marketplace—Bob Skow
Wednesday, June 7, 2006	Legacy Golf Course, Norwalk, IA	Golf Outing

Iowa Chapter CPCU Golf Outing a Success



On June 8, 2005 the Iowa Chapter of CPCU held our annual charity golf outing. We had 131 golfers participate and several attended a dinner afterwards in the clubhouse. In all, we raised \$3,634.84 for Blank Children's Hospital. The hospital will use the money to help equip its fire safety trailer. Thank you to everybody for making the outing a huge success.

Congratulations to Greg Mauk and family

Forty seventh Iowa Chapter President

Greg Mauk and his family were chosen as "Windsor Heights Citizen of the Year" this last summer. This is the first time a family has ever been chosen for this honor.

Greg who works at Nationwide has volunteered to emcee several events and assist with Fourth of July activities and Windsor Wonderland among others. He has been involved with the Scouting program when his children were younger and was a Cub Master for a few years.

Greg and his family served as Parade Marshals for the Fourth of July Parade this past July and even volunteered to judge the floats in the parade.

Please congratulate Greg when you see him. We are honored to have outstanding members such as Greg associated with the Iowa Chapter.

2004 Tax Return Available for Inspection

The 2004 Federal Income Tax Return has been completed and filed with the Internal Revenue Service. Any member who wishes to inspect the tax return for the Iowa Chapter, may contact Jody Ochsner at (515) 280-2456 or via email at: Jody.L.Ochsner@EMCIns.com and a copy will be provided for inspection.

FORREST C. MERCER

Thirteenth Iowa Chapter President dies at age 86

On May 15, 2005 Forrest passed away at the Wesley Acres Retirement Center in Des Moines. Born in Marengo, IA on July 29, 1918, he graduated from the University of Iowa Law School in 1942 and worked for the USDA/OPA for six years.

In 1948 he started his insurance career as a claim adjuster with EMC Companies, and received his CPCU designation in 1959. Forrest served on the board of the Iowa Chapter of CPCU in the early 1960's and was president for the 1964-65 year. He authored "Products Liability Law and Insurance – A Partnership of Insurers, Agents and Insureds" which appeared in the CPCU Annals in March of 1974.

He retired as a Vice President and Claims Supervisor with EMC Companies in 1983. Forrest's daughter, Jenifer Mercer-Klimowski, CPCU is Senior Vice President, Corporate Counsel and Secretary of EMC National Life Company

Thank You

From the First Iowa Chapter President

I am most grateful for induction into the Iowa Insurance Hall of Fame.

At 96 nice things don't come along very often!

I knew many of the previous recipients and am very proud to be included with them.

My daughter-in-law and grandson attended the ceremony and were royally treated by the hosts. My wife died last September. She would join me in thanking the Iowa Chapter of CPCU and the Iowa Insurance Hall of Fame.

Many good wishes and thanks,

Louis D. Burkhalter

Chapter Positions Available for This Year

If you have ever thought of volunteering for a position with your Iowa Chapter, now is the ideal time. We have a need for someone to fulfill the following positions:

New Designee Representative
Membership
Golf Event
Circle of Excellence

Good Works
Scholarships
Research

If interested in the New Designee, Membership, or Golf Event position, please contact Russ Greenwood (515) 237-2075.

If interested in the Circle of Excellence position, please contact Sam Waters (515) 267-5597.

If interested in the Good Works or Scholarships position, please contact Pat Martin (515) 267-6615.

If interested in the Research position, please contact Barb Sullivan (515) 225-5445.

You may also contact Jeff Baker (515) 237-0106 for information on any position.

Iowa Chapter CPCU Society Meeting

Date & Time	Thursday, September 8 th 2005 11:30 a.m.
Location:	Hilton Garden Inn, 8600 Northpark Drive, Johnston
Topic:	Alternative Risk financing Mechanisms & the Captive Insurance Marketplace
Speaker:	Kate Westover - Vice President/Innovative Captive Strategies, Inc.
Cost:	\$20.00 per person

Join us for lunch Thursday, September 8, 2005 as we kick off the 2005/2006 CPCU year at the new Hilton Garden Inn in Johnston. Our speaker will be Kate Westover, Vice President of Innovative Captive Strategies, Inc. Kate is an internationally known expert in the captive insurance marketplace and will share her thoughts on alternative risk financing mechanisms and the captive insurance marketplace. Make sure to join us for this dynamic presentation.

Questions to: Wade E. Sheeler, CPCU, CIC
641-269-8565
wsheeler@gmrc.com

To enable us to have an accurate count for food purposes, please call, fax or e-mail reservations by September 2, 2005 to:

CPCU-iowa@aml.org
or Kelly Kipping at 515-243-1558

Make checks payable to: Iowa Chapter – CPCU

Mail checks to:

Iowa Chapter CPCU
c/o Association Management Ltd.
431 East Locust
Suite 300
Des Moines, Iowa 50309

Name(s): _____

Company: _____ Total Enclosed: \$ _____

Cost: \$20 per person