

Iowa ChapterGram

CPCU Society Iowa Chapter

January 2007

www.cpcu-iowa.org

2006-2007 Officers

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

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

Secretary:
Jody Ochsner
(515) 345-2456
Jody.L.Ochsner@EMCIns.com

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

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

Directors

Karen Wassather
(515) 508-4580
Wassatk@nationwide.com

Dan Crew
(515) 345-4545
Dan.C.Crew@EMCIns.com

Russ Greenwood
(515) 345-2075
Russ.E.Greenwood@EMCIns.com

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

MESSAGE FROM THE PRESIDENT . . .

Happy New Year. It is hard to believe that 2006 has slipped into the pages of history, and we have now started 2007.

With the start of a New Year, it is time to make resolutions. If you have not yet already done so, resolve to promptly renew your membership in the CPCU Society. Your CPCU membership provides many benefits, including...

- Timely technical educational programs
- Career development and management programs
- Networking opportunities
- Leadership training
- Staying informed through the e-Journal, e-Link, and CPCU News
- Access to members-only resources on the national CPCU website (www.cpcusociety.org).

Make plans now to attend our 55th anniversary luncheon on Thursday, January 25th. Susan Voss, Iowa Insurance Commissioner and Jim Britt, President-Elect of the CPCU Society will be our featured speakers. A special commemorative gift will be given to each member who attends.

I hope each of you had a wonderful holiday season and make a New Year's resolution to get involved with the Iowa Chapter. We are truly one of the best!

Best Wishes for 2007.

Wade Sheeler, President Iowa Chapter of CPCU

"Many of life's failures are experienced by people who did not realize how close they were to success when they gave up."

Thomas Edison



Do You Know?



Lisa Bielser, CPCU, AIS, CPIW

Occupation: Lead Test Analyst, Nationwide Insurance

Background: Bachelors degree in Education, University of Northern Iowa; Business Analyst, Dunn & Bradstreet Corp, 1989-1995; Business Systems Analyst / Trainer, GuideOne Insurance, 1995-2003; Lead Tech Analyst, Nationwide Insurance, 2003-Present; President-Elect of IAGDM, 2006-2007

AIS Designation, 2000

CPCU Designation, 2001

CPIW Designation, 2006

Off-the-Job Interests: Spending time with husband, Dave, and our two Golden Retrievers, camping, golfing, and cheering for the Iowa Hawkeyes and the UNI Panthers.

Jolly Holiday Lights Thank You

Special thanks go to the following members of the Iowa Chapter for volunteering on the evening of December 10th to help out with the Jolly Holiday Light “good works” project:

Carol Bowers, Wade Sheeler, Steve Kuntz, Brian Joy, Steve & Susie McDonald, Bob & Debbie Conroy, Jeff Vail, and Russ Greenwood.

Special thanks go to Carol Bowers for coordinating the arrangements and for making a delicious crock pot of chili for the volunteers.

2007 Scholarship News for Iowa Chapter Members

This spring the Iowa Chapter of CPCU will be awarding two \$1,500 scholarships, one of which is the Ted Lussem Scholarship, to Iowa Chapter members and/or their dependents. This has been a very successful program and we are glad we can continue to offer this opportunity for a scholarship to our members.

To be eligible, applicants must be sophomores, juniors, or seniors attending a four-year accredited college or university in the state of Iowa and maintain an overall G.P.A. of at least 2.75 on a 4.0 scale. Preference will go to students majoring in business and/or an insurance related area of study. Don't forget, if an Iowa Chapter member is currently pursuing a four-year degree, that member is encouraged to apply for the scholarship as well.

Please use the application form provided in this [Chaptergram](#) or the one available from the homepage, www.cpcu-iowa.org. Applications should be mailed by Friday, March 16, 2007 to Connie Doud as shown on the form.

Iowa Chapter of CPCU 2007 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 and/or an insurance related area of study.

Applicant Name: _____

Mailing Address: _____

City/State/Zip Code: _____ Phone: _____

Year in school: Sophomore / Junior / Senior

Major: _____ Minor: _____

Grade Point Average: _____ Anticipated Graduation Date: _____

*Please complete and return this form and the following information by **Friday, March 16, 2007:***

1. A résumé that includes information regarding applicant's scholastic honors, extracurricular activities, employment history and other information you believe is 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, résumé and statement to:

Connie Doud, CPCU
Iowa Chapter of CPCU
c/o Farmers Mutual Hail Insurance Co.
6785 Westown Pkwy.
West Des Moines, IA 50266-7725

You may direct questions to (515) 237-7389 or connie@fmh.com
Fax: (515) 282-1220

President of the Independent Insurance Agents of Iowa



Carol Karns, the first female president of the Independent Insurance Agents of Iowa, has successfully sold insurance for 25 years. She holds both the CPCU and the CIC designations.

She attributes her success in selling insurance to 3 key points. The first point involves education. Not only does her education on the details of insurance give her confidence in her duties as an agent, but the knowledge also allows her to inform her clients why they should purchase certain options. She enjoys meeting new people and possesses an innate ability to listen to and understand people. She involves herself with the lives of her clients and establishes an element of trust with them. She considers these attributes to be the second key to her success. The third key rests with her ability to develop a plan annually and achieve the goals set forth in that plan.

She expresses a concern over the disappearance of the locally owned independent insurance agencies in Iowa's small towns. The small towns will lose the vested interest the locally owned agencies contribute if larger brokerage firms buy out the smaller agencies.

On a more personal note, Carol likes to travel and spend time with her grandchildren. She enjoys watching movies and listening to Bon Jovi.

The Iowa Chapter of CPCU would like to extend congratulations to Carol on becoming the president of the Independent Insurance Agents of Iowa and best wishes during her term.

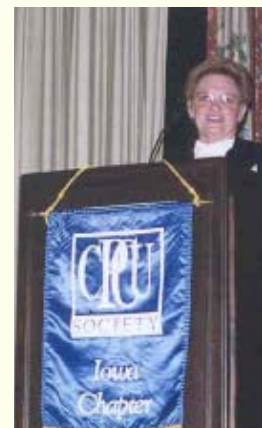
Remember When...



Dean Brooks



Judy Brannon and Larry Matthews, charter member



Margaret Ball

Not that long ago the Iowa Chapter of CPCU was celebrating our 50th anniversary. As we prepare for our 55th, reflect back on how the past 5 years has changed all of our lives.



Go Further in Your Career

Filed for
CE Credits!

The CPCU Society and the Iowa Chapter Present a National Leadership Institute Course

Ethical Decision Making for Insurance Professionals

Thursday, March 22, 2007

Farm Bureau Insurance Company
5400 University Avenue
West Des Moines, Iowa 50266

Friday, March 23, 2007

Pharmacists Mutual Insurance Company
808 Highway 18 West
Algona, Iowa 50511

Registration: 8 – 8:45 a.m. • Program: 8:45 – 11:30 a.m.

What You'll Learn

Today's business environment poses more and more ethical issues for both management and individual employees. In response to recent events, companies must reaffirm their commitment to ethics, consumer protection, and compliance to business standards. This half-day, interactive course focuses on ethical decision making in the context of insurance by using research, examples, and case studies from the insurance industry. Participants should leave the course with new tools on addressing ethical challenges in the workplace.

Learning Objectives

Upon completion of this course, the participant will be able to:

- Describe how values impact real business issues/decisions and their benefits and consequences to organizations.
- Describe the current legal and regulatory environment as it relates to business ethics in general and the insurance industry specifically.
- Apply a consistent methodology for making ethical decisions.
- Identify organizational resources and other information sources to help address ethical dilemmas.

Instructor

James R. Jones, CPCU, is the director of the Katie School of Insurance and Financial Services at Illinois State University and works with the dean of the College of Business, faculty, and industry representatives to help ensure that students in the insurance program at Illinois State have a world-class educational experience that prepares them for careers in the industry. Previously, Jones was director of claims education and director of Center for Performance Improvement and Innovation at the Insurance Institute of America in Malvern, PA. He has edited and written three books on insurance topics. Jones, who also holds the AIC, ARM, and AIS designations, has published articles in the *CPCU Journal*, *National Underwriter*, *Claims* magazine, *Claims Quarterly*, and *Total Quality* newsletter.

Cost

CPCU Society Members: \$99

Nonmembers: \$129

Continental Breakfast and course materials are included.

March 22, 2007 & March 23, 2007 West Des Moines, IA & Algona, IA Registration Form

- Yes— Please register me for the “*Ethical Decision Making*” course on March 22, 2007, in West Des Moines, IA. (EDM032207)
- Yes— Please register me for the “*Ethical Decision Making*” course on March 23, 2007, in Algona, IA. (EDM032307)

Four Easy Ways to Register:

- **Online at www.cpcusociety.org.**
- **Call** (800) 932-CPCU and select option 4 to speak to our Member Resource Center.
- **Fax** registration form to (610) 251-2780.
- **Mail** registration form to the CPCU Society at the address shown below.

Name (Mr./Ms.) Company

Street City/State/Zip

Phone Fax

Name on Badge E-Mail

Please pay registration fee in advance.

| | | |
|---------------------|-------|----------|
| CPCU society Member | \$99 | \$ _____ |
| Nonmember | \$129 | \$ _____ |
| Total | | \$ _____ |

Cancellation Policy

Your registration fee less \$50 will be refunded if notification is received at the Society two weeks prior to the program.

Check enclosed payable to: **CPCU Society**

Charge my credit card: MasterCard Visa American Express Diner’s Club

Account Number Expiration Date

Name as it appears on card Signature (Required)

Questions:

Call the CPCU Society’s Member Resource Center at (800) 932-CPCU, option 4.

Send registration to:

CPCU Society, 720 Providence Road, Malvern, PA 19355

Phone: (800) 932-2728, option 4 **Fax:** (610) 251-2780

2006-2007 CPCU Events

| | | |
|------------------------------------|----------------------------------|---|
| Thursday, January 25, 2007 11:30 | Embassy Club | 55th Anniversary Celebration. Susan Voss , Iowa Insurance Commissioner and James Britt , National CPCU President-Elect |
| Thursday, February 22, 2007 11:30 | Glen Oaks Country Club | Ed Wilson , Chief Meteorologist WHO-TV—Weather forecasting techniques and global warming |
| Thursday, March 8, 2007 8:00—11:30 | Drake University | Harry Burton , former FBI agent CE Credits Requested |
| Thursday, March 22, 2007 | Farm Bureau | NLI—"Ethical Decision Making" Jim Jones , CPCU |
| Friday, March 23, 2007 | Pharmacists Mutual | NLI—"Ethical Decision Making" Jim Jones , CPCU |
| Thursday, April 5, 2007 | Farm Bureau | Technical Workshops: Donald Malecki , instructor 1. Contractual , Additional Insured, and Certificates 2. Course of Construction, Installation Floaters and Kindred Coverages. |
| Thursday, April 19, 2007 | Des Moines Golf & Country Club | Bob Fulwider National President-Elect Independent Insurance Agents |
| Thursday, May 17, 2007 5:30 p.m. | Olmsted Center, Drake University | Iowa Insurance Hall of Fame |
| Wednesday, May 30, 2007 | Legacy Golf Course, Norwalk | Golf Outing |

Iowa Chapter of CPCU Meeting

| | |
|-------------|--|
| Date & Time | Thursday, January 25, 2007 11:30 a.m.— 1:30 p.m. |
| Location: | Embassy Club, 801 Grand Ave. Des Moines, Iowa |
| Topic: | 55th anniversary celebration with Susan Voss and James Britt |

DESCRIPTION: This will be our 55th anniversary celebration. Susan Voss the Iowa Insurance Commissioner will speak as well as James Britt the National President-elect. In addition, Ted Lussem will provide a history of the Iowa Chapter.

Note: We expect this luncheon to last at least a half hour longer than normal.

To enable us to have an accurate count for food purposes, please call, fax or e-mail reservations by January 19, 2007 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