



## 2008-2009 Officers

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## Upcoming Events

Thursday, September 18	Des Moines Golf & Country Club	Speaker: Scott Armstrong Topic: "Insurance Knowledge Challenge"
Thursday, October 16	Scottish Rite Temple	Speaker: Judy Bradshaw, Des Moines Chief of Police
Wednesday, November 12	Hotel Fort Des Moines	"I-Day" Keynote Speaker: Captain Al Haynes
Wednesday, December 3	Des Moines Botanical Center	TBA

## MESSAGE FROM THE PRESIDENT.....

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Summer is almost over and the CPCU year has officially started. If you've been watching the Olympics, you know that many records have been broken and many medals won. Like many of the Olympic athletes, our chapter continues to be at the top of our game.

Our chapter is tied for first place with 28 new designees for 2008. Atlanta and Central Illinois also have 28. Our new designees will be conferred during the upcoming Annual Meeting and Seminars in Philadelphia, Pa on September 6 – 9.

Not only are we tied for first for the number of new designees, but we achieved the gold level in the CPCU Society's Circle of Excellence program for 2007-08. This is the seventh consecutive year that we have achieved the gold level. During the annual meeting, Immediate Past President, Kevin Seward, and I will represent the chapter in being recognized for this achievement. Congratulations to Kevin, the officers, board members and members at large for making this achievement possible.



The Circle of Excellence submissions for the last three years are posted on our web site. In response to feedback from one of our members in our survey last year requesting that we keep everyone informed about what our committees are doing throughout the year, we have also posted our planned Circle of Excellence events for 2008-09 on our web site. This will be updated throughout the year so our members can see the progress being made. However, I would also challenge you to review the list to see how you can contribute and encourage you to submit your accomplishments to our Circle of Excellence Chair, Melissa Allen, [mallen@guideone.com](mailto:mallen@guideone.com).

Our chapter Vice President, Barb Sullivan, has been busy planning our chapter's events for the year. You won't want to miss the first meeting on September 18, at the Des Moines Golf and Country Club. Scott Armstrong from GenRe will be conducting an interactive program called "Insurance Knowledge Challenge".

When registering for our chapter events, you will notice a different registration address and email. Our previous administrator made a strategic decision to focus strictly on full service clients. As a result, we needed to find a replacement and were pleased to find another administrator who is as professional and easy to work with as our previous administrator. Be watching the October ChapterGram for an introduction to our new administrator.

I close by thanking you for allowing me to serve as your chapter President for 2008-09 and look forward to seeing you at one of our upcoming events.

"Think of giving not as a duty but as a privilege."

--[John D. Rockefeller Jr.](#),  
businessman and philanthropist

Jody Ochsner, CPCU



### Plan now to attend the CPCU Society's 2008 Annual Meeting and Seminars!

Join CPCUs, new designees, and insurance industry leaders for four full days of educational events, professional networking, and celebratory events, in the historic city of "Brotherly Love," Philadelphia, Pa.

### "The Links" Welcoming Committee

For the 2008-09 year, we are happy to inform you the Iowa Chapter of CPCU will continue the good work of "The Links" welcoming committee.

This committee was formed in 2007 to welcome our current members back for another year of memorable meetings and to welcome in our new designees and any CPCUs that have recently moved to our area.



## THE LINKS

At each of our monthly meetings you will find at least two Links members in attendance. Please look for The Links logo on the name tag for a 2008-09 committee member. We hope this committee will help you with any questions you may have about the Iowa Chapter of the CPCU Society. We will also act as a liaison for you and your ideas to put you in contact with the appropriate board member or chapter member. We also hope to make you feel welcome at every meeting.

Members of the 2008-09 Links committee are:

Lorie Bear	<a href="mailto:lorie.bear@fbfs.com">lorie.bear@fbfs.com</a>
Alison M. Cate	<a href="mailto:Alison.M.Cate@emcins.com">Alison.M.Cate@emcins.com</a>
Nancy Green	<a href="mailto:Nancy.D.Green@emcins.com">Nancy.D.Green@emcins.com</a>
Dalith M. Wells	<a href="mailto:Dalith.M.Wells@emcins.com">Dalith.M.Wells@emcins.com</a>
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Julie Kane	<a href="mailto:kanej1@nationwide.com">kanej1@nationwide.com</a>

Please feel free to contact any of the above Links members at our monthly meeting or by email for any of your questions. We are very excited about our new designees this year and looking forward to welcoming each and every one of you at the next meeting.

The Society's ad campaign "Defining Success" continues to capture the spirit of employers who endorse the value of the CPCU designation, and partnership with the CPCU Society. This newest ad features Bruce G. Kelley, CPCU, and president and CEO of EMC Insurance Companies. His message clearly articulates how CPCU and Society membership helps to support EMC's continued success.

The ad will appear in Best's Review, National Underwriter, American Agent & Broker, Business Insurance, Risk & Insurance and Rough Notes, beginning August 2008.

Please share this ad with your colleagues, company managers and HR directors to reinforce the value of the CPCU designation, and importance of CPCU Society membership.

*Defining Success*

**EMC**  
Insurance Companies

*Bruce G. Kelley, CPCU  
President and CEO  
EMC Insurance Companies*

"EMC's success has been built upon integrity, superior service, team work, and continuous improvement for nearly 100 years. Together, these form the bedrock for our business practices and are the guiding principles that will shape our future.

Our partnership with the CPCU Society directly aligns with these core values. I encourage our employees to pursue the CPCU designation and become active in the CPCU Society because it promotes their dedication to the highest ethical standards, life-long learning, leadership, and professional excellence. By supporting the CPCU designation program and the CPCU Society, we're ensuring the success of our employees and our company."



For more than 60 years, the CPCU Society has been helping its members and their companies insure success by promoting excellence through ethical behavior, continuing education, and leadership opportunities. The Society's more than 28,000 members have earned the prestigious Chartered Property Casualty Underwriter (CPCU) designation. To learn more, please visit our web site.

[www.cpcusociety.org](http://www.cpcusociety.org)

The **Burkhalter Award** will be presented to individuals for outstanding achievements and contributions to the insurance industry in Iowa. The impact and effect of the contribution and achievements of the recipient will be recognized and broad based in the community.

The **Burkhalter Award** is designed to recognize people who have made a contribution to the property and casualty insurance industry and their community through civic involvement.

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 through his civic activities.

The fields of achievements to be evaluated include the following:

Promoting the field 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; and leadership activities in the governmental arena.

## GOALS OF THE BURKHALTER AWARD

- Recognize outstanding service rendered 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 to: Iowa Chapter CPCU Burkhalter Award  
c/o Nancy Green, CPCU  
EMC Insurance Companies, E11S  
717 Mulberry St  
Des Moines, IA 50309
4. Nomination deadline is October 15th.
5. The award will be presented at the annual I-Day seminar.

# 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 TO: Iowa Chapter CPCU Burkhalter Award  
c/o Nancy Green, CPCU  
EMC Insurance Companies, E11S  
717 Mulberry St  
Des Moines, IA 50309

Deadline for submission: October 15th

### Pam Bryan, CPCU

**Occupation:** Sr. Commercial Underwriter-Illinois Operations  
-Grinnell Mutual Reinsurance Company



**Background:** Pam began her insurance career with Grinnell Mutual in July 1987 as a clerk in the processing department. She immediately recognized the opportunities for advancement within the company by focusing on her education. After completing various IIA courses, she took on the CPCU curriculum in 1992. A mere 10 years later she received her CPCU designation, taking one course a year (yes, there were 10 back then). Being a firm believer in exercising the brain, she's since completed the CIC designation and is currently working towards the CRM through the National Alliance. Having held various positions within the company's underwriting department, she was promoted to personal lines underwriter in 1991 and found her niche in the commercial underwriting department 13 years ago. She's also been active with the CPCU Grinnell Sub-Chapter having served as secretary/treasurer, Vice-President and completing her term as President just last year. She truly enjoys commercial underwriting because of the variety it offers each day and the opportunity to build close working relationships with her agents.

**Off-the-Job Interests:** Pam and her husband David reside in Montezuma and have three children, Athena 24, Seth 22 and Elijah 12, and a one year old grandson Breck. She's an avid bicyclist and took part in her first RAGBRAI this past July. She and her family enjoy most outdoor activities but especially golf, snow skiing and snowmobiling.

## Iowa Chapter 2008-09 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 12, 2008.

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

Iowa Chapter CPCU  
c/o Association Insight  
4554 114th Street  
Urbandale, IA 50322

## Electronic Notices and Spam Filters

Most of us rely upon email for quick and dependable communication so make sure that your spam filters are not "trashing" your CPCU notices! Spam filters are continually updated and are more sophisticated than ever. Please check with your network administrator if you think you are not receiving your CPCU notices.

Our Chapter has recently changed administrators. Most Iowa Chapter CPCU notices will now be sent by [cpcu-iowa@associationinsight.com](mailto:cpcu-iowa@associationinsight.com). You may also access current information at any time on the Iowa CPCU web site at [www.cpcu-iowa.org](http://www.cpcu-iowa.org).

# New Designee Reception

On August 27th, 33 people, including 15 new designees, showed up for the 2008 New Designee Reception at Jimmy's American Café in West Des Moines.



## Thanks to Our 2008 Golf Outing Sponsors

On June 5th the CPCU annual golf outing was held at Copper Creek Golf Course. The event had a great turnout with 105 golfers participating. The winners of the event were Joe Albrecht, Matt Schleier, Ben Thurston, and Danny Hayes from Nationwide Insurance. Prizes were awarded to 9 teams and over 15 door prizes were given out at the dinner following the event.

We would like to thank all of our sponsors listed below for making this event a success again this year. We would like to give a special thank you to our major sponsors this year, EMC Insurance and IMT Insurance.

IMT Insurance

EMC Insurance

GAB Robins Insurance

Auto Glass Center

Continental Western Insurance

Allied Insurance

Nationwide Insurance

State Farm Insurance

GuideOne Insurance

CGA Insurance Group

Brooks-Lussem-Clem Insurance

Iowa Insurance Hall of Fame

Grinnell Mutual Insurance

Farm Bureau Insurance

Iowa Chapter of CPCU

Chubb Insurance

FISERV

Bituminous Insurance

Indiana Insurance

We raised \$2500 that was donated to Blank Children's Hospital. Jody Ochsner and Kevin Seward presented the check on August 26. This donation increased our total donations to Blank Children's Hospital to over \$15,000.



Alissa McKinney, Linda Plummer, Jody Ochsner, Kevin Seward

## 2008-2009 CPCU Events

Thursday, September 18, 2008 11:30-1:00	Des Moines Golf & Country Club	Speaker: Scott Armstrong, GenRe Topic: "Insurance Knowledge Challenge"
Thursday, October 16, 2008 11:30-1:00	Scottish Rite Temple	Speaker: Judy Bradshaw, Des Moines Chief of Police
Wednesday, November 12, 2008	Hotel Fort Des Moines	"I-Day" Keynote Speaker: Captain Al Haynes and Insurance Industry Panel
Wednesday, December 3, 2008 5:00pm-7:00pm	Des Moines Botanical Center	TBA

## North Central Iowa Sub-Chapter Annual Meeting

On June 12th, Kevin Seward and Ted Lussem attended the North Central Iowa Sub-Chapter Annual Meeting & Election of Officers. Ted gave a presentation on insurance memorabilia/history. Kevin presented Jon Grether with the CPCU Excellence Award and gave the sub-chapter a lectern banner to use at their meetings. Lori Walton is the new 2008-09 president of the North Central Iowa Sub-Chapter succeeding Jon Grether.



Kevin Seward, Lori Walton, Jon Grether



Ted Lussem



Kevin Seward, Jon Grether

# Chapter Meeting

Date & Time	Thursday, September 18, 2008, 11:30 a.m.
Location:	Des Moines Golf and Country Club
Speaker:	Scott Armstrong, GenRe
Topic:	"Insurance Knowledge Challenge"

## DESCRIPTION:

Scott Armstrong from GenRe presents an interactive program called the "Insurance Knowledge Challenge". Think you know a lot about the history and trivia of the insurance business? Like a challenge? Like to have some fun? If so, then attend the 9/18 CPCU lunch meeting and get put to the test!.

To enable us to have an accurate count for food purposes, please mail or e-mail reservations by September 12, 2008 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  
4554 114th Street  
Urbandale, IA 50322

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 Barb Sullivan at 515-225-5445.