



Iowa ChapterGram

CPCU Society Iowa Chapter

February 2006

www.cpcu-iowa.org

2005-2006 Officers

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MESSAGE FROM THE PRESIDENT . . .



Jeff Baker

By now you should have received the Iowa Chapter's on-line survey by e-mail. This is designed to give us feedback on the quality of programs we sponsor, both at the state level and

the national sponsored seminars. It also helps us understand the overall chapter membership needs. We encourage you to take a few minutes to complete the survey. The survey will help us be of more value to our members.

One new service in the works is the ability to use credit cards to register for monthly meetings and seminars. Many insurers have mandates that company expenses are put on company credit cards in lieu of cutting checks, and with many company consolidations, the check process can be difficult.

We hope to have the credit card service up and running within the next month...now you have one less excuse NOT to attend the monthly lunch meeting. So we'll see you there!

Welcome New Designees

The Iowa Chapter would like to welcome its two newest members.

Kirk Hooten — Nationwide
Kimberly Mouw — GuideOne Insurance

If you see either of these two individuals, please congratulate them and welcome them to the Iowa Chapter.



2005 CPCU Meeting Dates, Locations, and Topics

Thursday, February 16, 2006	Allied Insurance	Marketing Trends & Contingent Commissions, Jim Hagenbucher, VP Marketing, Allied
Thursday March 9, 2006	Drake University	Ethics
Wednesday, March 29, 2006	Farm Bureau-NLI Workshop	Strategic Thinking and Planning
Thursday, April 20, 2006	Blank Park Zoo	Pat Griffin, Dale Carnegie Training
Tuesday, May 16, 2006	Farm Bureau-NLI Workshop	Building Highly Effective Teams
Friday, May 19, 2006	EMC Insurance	Iowa Workers' Compensation Marketplace - Bob Skow
Wednesday, June 7, 2006	Legacy Golf Course, Norwalk, IA	Golf Outing

2006 Scholarship News for Iowa Chapter CPCU

The Iowa Chapter of CPCU Scholarship Committee and Board of Directors have agreed that our two \$1,500 scholarships will again be awarded to an Iowa Chapter member or one of their dependents. We believe this program has been very successful, and we will continue offering this opportunity for scholarship dollars 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. Remember, if an Iowa Chapter member is currently pursuing a four-year degree, he/she is encouraged to apply for the scholarship as well as any dependents of our membership.

Please use the included application form to submit the necessary paperwork for consideration. This should be sent by Friday, March 17, 2006 to Dan Crew at the address shown on the form.

Insurance Hall of Fame Nominations

Do you know somebody who deserves consideration for the Iowa Insurance Hall of Fame? Look for a nomination form in this ChapterGram. Fill it out and send it to **Karey Meek-Anderson**. Deadline for nominations is March 22, 2006.

NLI Seminars

If you have wanted to further your career without going back to college, consider the NLI courses. They are a means to achieve your professional goals by providing you the tools and confidence you need in today's workplace. NLI courses are taught by industry professionals and will provide you the resources you need to be an emerging leader in your company. These courses provide you with new knowledge and skills that you can use immediately in practical day-to-day applications.

Courses are convenient so they will fit into your busy schedule. Both full and half day courses are offered. Courses are offered on a regional or local basis. Check out the educational events on the CPCU Society website (www.cpcusociety.org) for upcoming courses and a description of each seminar.

The following is a partial list of some of the great seminars available:

- Building Highly Effective Teams
- Creative Thinking in Business
- Effective Communication
- Persuasive Communication
- Project Management
- Successful Negotiations
- Facilitative Leadership

The Iowa Chapter will be sponsoring two of these courses later on this spring:

- Strategic Thinking and Planning (March 29th)
- Building Highly Effective Teams (May 16th)

Both seminars will be held in West Des Moines. Watch for more details on these offerings in the near future.

The NLI program is constantly evolving. The CPCU Society listens to the needs of its members to respond with educational resources that today's property and casualty professional needs. If you have questions about future course offerings or a topic you would like to suggest, contact Mark Dolinski at (800) 932-CPCU or via email at mdolinski@cpcusociety.org.

Change of Date for May Meeting

Due to a scheduling conflict, the May meeting date has changed from Thursday May 11th to Friday May 19th. We will still hold the meeting at EMC Insurance Companies, and Bob Skow will speak about the Iowa Workers' Compensation marketplace. Please mark your calendars to reflect the change of date. We apologize for any inconvenience and hope you will be able to join us.

2006 ETHICS DAY...and MORE
Kelley Insurance Center – Drake University
 In cooperation with
The Iowa Chapter, CPCU Society;
Society of Financial Service Professionals; and
Des Moines Association of Insurance and Financial Advisors

Date & Time	Thursday, March 9th, 2006
Location:	Olmsted Center Drake University 29th & University Des Moines, IA 50311
Agenda	7:30 - 8:00 a.m. Registration & Continental Breakfast 8:00 - 8:05 a.m. Welcome by Master of Ceremonies Bruce Kelley, CPCU, CLU President and CEO, EMC Insurance Companies
Speaker	8:05 - 9:05 a.m. "Ethical Behavior & the Insurance Professional - Doing What's Right!" David Milligan, FLMI, AIRC, AIAA, ACS, CCP, ACP Compliance Officer, AmerUs Life Insurance Group
Speaker	9:05 - 9:55 a.m. "...and place their interests above my own." Larry Klein, CPCU, AAI, AIM Secretary—Treasurer, CPCU Society
	9:55 - 10:10 a.m. BREAK
Speaker:	10:10 - 11:00 a.m. "What Would You Do? Professional Ethics in Practice" Joseph E. Frack, CPA; Chief Executive Officer, Society of Financial Service Professionals
Speaker:	11:00 - 12:00 p.m. "Ethical Case Studies - Putting It All Together" Jennie L. LeGates, CPCU, CPIW, DAE Manager, Training and Development, Grinnell Mutual Reinsurance Company
Reservation:	Registration and payment must be received by March 3, 2006. Morning program including 4-hour CE & breakfast \$50 <i>Note: SFSP Members pay only \$40 for this event</i>
Parking	Parking in the Olmsted Lot will be validated at the Registration Table

Questions?

Doug Ireland (515) 271-2133
 Doug.ireland@drake.edu

Clark Smith (515) 279-2185
 dmaifa@membermgmt.com

Wade Sheeler (641) 269-8565
 wsheeler@gmrc.com

2006 ETHICS DAY...and MORE
Kelley Insurance Center – Drake University

In cooperation with

The Iowa Chapter, CPCU Society;
Society of Financial Service Professionals; and
Des Moines Association of Insurance and Financial Advisors

**“Ethical Behavior and the Insurance Professional -
Doing What’s Right!”**

David Milligan, FLMI, AIRC, AIAA, ACS, CCP, ACP; Compliance Officer, AmerUs Life

This class will take an everyday, common sense approach to ethics in our dealings with individuals and applying that approach to the insurance profession and industry. The session will cover how one should develop a code of ethics in dealing with consumers and how relationships require mutual respect. A related topic is that of identifying the importance of determining needs and objectives for clients. The presentation will also explore why being an insurance professional is a trusted position and what it means to provide service in a confident yet common-sense manner that allows for a mutually beneficial relationship between the insurance professional and his/her client.

“...and place their interests above my own”

Larry L. Klein, CPCU, AAI, AIM; Secretary-Treasurer, CPCU Society

Ethics is a part of our daily lives as we conduct our business in the world of insurance. The speaker will discuss some of the historical underpinnings of ethics in the insurance industry, especially as it relates to the CPCU Society and its members. In addition, there will be a discussion of the nine ethical cannons of the AICPCU Code of Professional Ethics. These will be compared and contrasted to those of the CPA Code of Professional Conduct and that of attorneys. The presentation closes with four thoughts on applying ethics in our professional life and business activities.

“What Would You Do? Professional Ethics in Practice”

Joseph E. Frack, CPA; Chief Executive Officer, Society of Financial Service Professionals

This session will focus on the ethical standards, concepts, and practices of the Certified Financial Planner™ and members of the Society of Financial Service Professionals. Ethics will be defined and placed in a professional ethics framework. In addition, the speaker will present an overview of both the CFP® and the FSP codes of ethics and professional responsibility. Finally, the presenter will arm his audience with a six question ethical decision-making tool.

“Ethical Case Studies—Putting It All Together”

**Jennie L. LeGates, CPCU, CPIW, DAE; Manager, Training and Development,
Grinnell Mutual Reinsurance Company**

The speaker will incorporate key points from the other presenters to help tie it all together. Using given fact situations, attendees will identify and discuss the various ethical implications and choices they would make. Fact situations will cover property/casualty sales and underwriting, life insurance sales, and behaviors within insurance organizations.

Iowa Chapter of CPCU 2006 Scholarship Application

Scholarship Amount: **\$1,500** toward tuition during recipient's 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 17, 2006:***

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:

Dan Crew, CPCU, CIC
Iowa Chapter of CPCU
c/o LaMair-Mullock-Condon Co.
4200 University Ave., Suite 200
West Des Moines, IA 50266-5945

You may direct questions to 515-237-0160 or dan.crew@lmcins.com



Iowa Insurance Hall of Fame Nomination Form

Guidelines: To be eligible for consideration, nominees must have an Iowa connection, serve as a role model for young people as well as others in the insurance business, exhibit the highest standards of ethical conduct, and have significantly impacted the insurance industry.

Nominee Information:

Name: _____

Address: _____

Home Phone: _____ Office Phone: _____

E-mail: _____

Nominator Information:

Name: _____

Address: _____

Home Phone: _____ Office Phone: _____

E-mail: _____

Required documentation to be included with the nomination:

- Biographical Information
- Summary of contributions to the insurance industry and community
- Other documentation to support guideline considerations, including letters of recommendation

Please send all nomination materials to: **Karey Meek-Anderson, HIA, CSA**
Iowa Bankers Insurance & Services, Inc.
P.O. Box 6210
Johnston, Iowa 50131

Deadline: March 22, 2006

Iowa Chapter CPCU Society Meeting

Date:	Thursday, February 16, 2006 11:30 a.m.
Location:	Allied/Nationwide
Speaker:	Jim Hagenbucher, VP Marketing (Allied)
Topic:	Contingent Commissions & Marketing Trends in the 21st Century
Cost:	\$20.00 per person

Join us for lunch Thursday, February 16, 2006, at Allied/Nationwide. Jim Hagenbucher, VP of Marketing from Allied will be our speaker. He will speak on contingent commissions & marketing trends.

Registration form also may be obtained at www.cpcu-iowa.org (“Hot Topics”)

To enable us to have an accurate count for food purposes, please call Kelly Kipping at 515-243-1558, fax to 515-243-2049 or e-mail reservations to CPCU-iowa@aml.org by 4:00 p.m. on February 10, 2006.

Make checks payable to: Iowa Chapter – CPCU

Mail checks and registrations 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