



# Iowa ChapterGram

CPCU Society Iowa Chapter

December 2006

[www.cpcu-iowa.org](http://www.cpcu-iowa.org)

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## MESSAGE FROM THE PRESIDENT . . .

Congratulations to the Iowa Chapter on another great I-Day on November 3<sup>rd</sup>. We had 138 in attendance, with 9 of our new designees joining us. It was also a special honor to have Betsey Brewer, President of the CPCU Society with us as our conferment speaker. Special thanks to Kevin Seward and all of the people who assisted him with the planning for I-Day.



I would like to thank everyone who brought toys or donated cash for the Toys-for-Tots campaign. This was the first time we had tried this, and hopefully it will be something that will grow in the future.

Our December meeting is on the 6<sup>th</sup>. Come and join your fellow CPCUs for a fun evening at the Wine House in Waukee. This promises to be a fun evening to put everybody in the holiday spirit.

We will be volunteering at the Jolly Holiday Lights event at Waterworks Park on the evening of December 10<sup>th</sup>. If you have never helped out with this, make this the year you volunteer. It is a fun event. Contact Carol Bowers ([j.carol.bowers@emcins.com](mailto:j.carol.bowers@emcins.com)) if you have not already signed up.

As 2006 draws to a close, take a few minutes to think back on those things you are most thankful for in your life. One of the things I am thankful for is all of the great people I have met through the Iowa Chapter.

Best wishes to each of you and your families for a happy holiday season.

Wade Sheeler  
President

Friendship with ones self is all important, because without it one cannot be friends with anyone else in the world.

***Eleanor Roosevelt***

## Do You Know?



### Terry Kraft, CPCU, ARM, AU

**Occupation:** Business Development Executive, Fiserv Insurance Solutions

**Background:** Bachelors degree in Business Administration, Northwestern College, Orange City, IA; 1978-1991 IMT Insurance; Fiserv Insurance Solutions 1991-Present currently responsible for sales of Policy Administration, Rating, Billing, Claims and Financial Reporting solutions to Property Casualty Insurance Companies.

CPCU designation, 1985; ARM designation, 1987; AU designation, 1989

**Off-the-Job Interests:** Enjoys spending time with his family, working outside, sports including golf and lifelong New York Yankees fan.

## Grinnell Subchapter Donation



From left to right: Kama Small, Tressa Lepley, Iowa Chapter CPCU President Wade Sheeler, Chuck Malloy, Grinnell Sub-Chapter CPCU President Pam Bryan, GMRC CEO Dan Agnew, Blank Children's Hospital Fire Safety House Administrator Melissa Wardell, Bruce Bumgardner, Jennie LeGates, Mark Johnson and National CPCU President Betsy Brewer.

The Grinnell Sub-Chapter of the CPCU Society raised \$1,100.00 for the Blank Children's Hospital Fire Safety House program. The Fire Safety House at Blank Children's Hospital is a FREE fire safety education program designed to teach children important aspects of fire safety.

## I-Day an “Unforgettable” Success



Tana Goertz prepares to address attendees at I-Day 2006



Kevin Seward, Tana Goertz, and Wade Sheeler



Wade Sheeler and Betsey Brewer with the 2006 new designees who attended our conferment at I-Day



Iowa Chapter charter member, Larry Matthews and Betsey Brewer, CPCU Society National President



Kevin Seward, Alison Cate, and Wade Sheeler pose with a new toy and a member of the United States Marine Corps Reserve. Attendees of I-Day were asked to bring a toy for the Corps' "Toys For Tots" campaign.

# Recap of I-Day

## I-Day Pathways to Success- Recap of Craig Mathre's Commercial Property Pitfalls

On a bright, crisp fall morning, the Iowa Chapter of the CPCU Society held the annual I-Day program and CPCU Designee Conferment Ceremony. A unique feature of this November 3, 2006 I-Day was that it included three concurrent sessions following the energizing keynote presentation by Tana Goertz:

### Concurrent Sessions

Claims Path- Presented by Jeff Baill

Technology Path- Presented by Doug Jacobson

Underwriting Path- Presented by Craig Mathre

The advantage to this "path" approach is that participants could attend the session that was of most interest to them. One disadvantage is that with so many interesting topics and speakers to choose from, participants often struggled to make a selection.

Just in case you missed the Underwriting Path and you wished you had been able to attend that session, below is information about where to access information.

Craig Mathre, CPCU, CLU, CIC, AU, IAC, AAM, ARM, ARE, ASLI is Vice President of a specialty underwriting division of Markel Corporation, based in Glen Allen, VA. Craig explained common pitfalls in commercial property insurance.

1. Measurement of business income and extra expense loss exposures
2. Functional Building Valuation
3. Agreed Value
4. Exposures to Ordinance or Law
5. Blanket Insurance
6. The Leasehold Interest Exposure

Craig has provided a copy of the presentation slides which are currently posted on our chapter website at [www.cpcu-iowa.org](http://www.cpcu-iowa.org) for you to view or download.

A review of these topics may also be found in the publication, RESOURCES, Summer/Fall 2005 issue. Reprints can be obtained by contacting the Society of CIC at [www.scic.com](http://www.scic.com).

### Bonus Session

In the bonus session, Craig taught us the proper way to use the common sentence starter "All ya'all", but you really had to be there for that one since we cannot really explain all the complexities of proper usage in print.

By Karen Wassather

*Editor's note: All I-Day presentations are available for download on our website  
<http://www.cpcu-iowa.org>.*

## Jolly Holiday Lights



You can help make a dream come true for a seriously ill child by helping with Jolly Holiday Lights. This fundraiser for the Make-A-Wish foundation of Iowa has provided many wishes to children with a life threatening illness.

CPCU members can help by volunteering on Sunday, December 10th from 5:00 p.m. to 8:00 p.m. Volunteers will hand out programs and collect fees. These displays are located in Water Works Park and have been a family favorite ever since their inception in 1996. Every year this event gets bigger and better.

Help put some sparkle in a child's eyes, contact Carol Bowers at EMC Insurance Companies at (515) 345-2009 or J.Carol.Bowers@EMCIns.com. Volunteers must be at least 18 years of age and a release form must be signed.

## Have You Ever Thought About.....

Have you ever thought of volunteering on the national basis for the CPCU Society? This is a great way to expand your horizons even further in the insurance industry. Opportunities are available to serve on task forces, committees, as a governor, or an officer.

Check these opportunities out under [www.cpcusociety.org](http://www.cpcusociety.org) under "members" (volunteer for society service).

Currently the Iowa Chapter has four members serving on a national basis:

Judy Brannon	Senior Resource Section Committee
Joseph Burkle	CLEW Section Committee
Wade Sheeler	Budget & Finance Committee
Jim Jones	National Governor.

**Seminar sponsored by  
Central Iowa Chapter SFSP**

*Business & Personal Considerations in Life Insurance Planning....*

- **Choosing a Tax Entity: Planning Issues & Considerations with Andrew J. Rinn, JD, CFP, CLU, ChFC**
- **Ownership & Beneficiary Arrangement: Tax Traps for the Unwary with Gary S. Frank, JD, CLU, ChFC**
- **Taxation of Annuities, Non-Qualified Plans with Donn C. McLaughlin, JD, CLU**
- **Panel Discussion on A Review of Key Legislation That Impacts Your Business**

**Wednesday, December 13<sup>th</sup>, 2006 – 7:00 to 11:30 AM**

Farm Bureau Dining Room

5400 University Avenue, West Des Moines, Iowa

(Four Hour Insurance Continuing Education approved.)

**Sponsored by Brokers Clearing House Ltd.**

Hosted by: Central Iowa Chapter of the Society  
Of Financial Service Professionals

*(This is in conjunction with their regular monthly meeting; Registration and Breakfast begin at 7:00 a.m. and the program begins at 7:30 a.m.! Parking is available in the lot east of the main entrance. Breakfast will be provided in the room – please do not go through the cafeteria line).*

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Name \_\_\_\_\_ Company \_\_\_\_\_

Address \_\_\_\_\_ License # \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

Register me for the following:

\_\_\_\_\_ Dec. 13<sup>th</sup> 4 hour CE seminar (Member & BCH affiliated staff cost FREE)

\_\_\_\_\_ Dec. 13<sup>th</sup> 4 hour CE seminar (Non-Member cost \$50)

Method of payment:

\_\_\_\_\_ I have enclosed a check in the amount of \_\_\_\_\_

\_\_\_\_\_ Please charge my credit card for the amount of \_\_\_\_\_

CC # \_\_\_\_\_ Exp. \_\_\_\_\_

Name as it appears on the card \_\_\_\_\_

Return to: Lynn Harkin, Central Iowa Chapter SFSP, 431 East Locust Street, Suite 300, Des Moines, IA 50309 PHONE: 515/243-1558 FAX: 515/243-2049 EMAIL: Exec@sfspsdm.org\_Deadline to register is 12/6/06!

## Good Reviews for NLI Seminar



On October 24, 2006 the Iowa Chapter sponsored an NLI course designed to teach new ways to create innovative strategies that build and leverage brand value, including the "brand value" of your CPCU designation. Dr Kent Jackson, CPCU, a leading expert in strategy and branding, facilitated the course where participants were able to apply powerful concepts, principles, and processes to real business situations.

Below you will find the results of the survey completed by the course participants.

Evaluation Question	Mean Score	High Score	Low Score
How would you rate the education offered at this program?	4.50	5	3
How would you rate the workbook and handout materials?	4.20	5	3
How would you rate the audio/visual presentation materials?	3.90	5	3
Speaker: Knowledge of Topic	4.80	5	4
Speaker: Ability to Communicate	4.40	5	4
Overall Rating of Program	4.40	5	4

## 2006-2007 CPCU Events

Wednesday, December 6, 2006 5:00—7:00 p.m.	The Wine House 14225 University Avenue, Waukee	Holiday Party
Thursday, January 25, 2007 11:30	Embassy Club	55th Anniversary Celebration. <a href="#">Susan Voss</a> , Iowa Insurance Commissioner and <a href="#">James Britt</a> , National CPCU President-Elect
Thursday, February 22, 2007 11:30	Glen Oaks Country Club	<a href="#">Ed Wilson</a> , Chief Meteorologist WHO-TV—Weather forecasting techniques and global warming
Thursday, March 22, 2007 8:00— 12:00	Farm Bureau	NLI—"Ethical Decision Making"
Thursday April 5, 2007	Farm Bureau	Technical Workshops: 1. Contractual , Additional Insured, and Certificates 2. Course of Construction, Installation Floaters and Kindred Coverages.
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

## IAGDM Website is Live

The Insurance Association of Greater Des Moines, Inc (IAGDM) is an association of diversified insurance professionals. Its members are dedicated to the highest standards of performance and integrity. The purpose of the association is to promote insurance education, encourage professional development, and provide a foundation for mutual support within the association and the industry.

Please take a few minutes and visit the Insurance Association of Greater Des Moines' new website. The URL for the website is <http://www.iagdm.org>



## Iowa Chapter of CPCU Meeting

Date & Time	Wednesday, December 6, 2006 5:00 p.m.—7:00 p.m.
Location:	The Wine House 14225 University Avenue Waukee
Topic:	Food & Wine Pairings, Holiday Wine Selections, and Responsible Alcohol Consumption

**DESCRIPTION:** The December meeting will be held on Wednesday, December 6 from 5:00 - 7:00 at The Wine House. The address is 14225 University Avenue. It's a Waukee address, but it's only two blocks west of Jordan Creek Parkway on University Avenue. We will have wine and appetizers; someone from the Wine House will also be on hand to speak about food and wine pairings, holiday wine selections, and responsible alcohol consumption.

To enable us to have an accurate count for food purposes, please call, fax or e-mail reservations by November 30, 2006 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