

Iowa ChapterGram

CPCU Society Iowa Chapter

April 2007

www.cpcu-iowa.org

MESSAGE FROM THE PRESIDENT . . .

2006-2007 Officers

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Spring is "officially" here and it is great to think about seeing flowers, leaves, and green grass which will be springing to life any day.

March was a busy month for the Iowa Chapter of CPCU. We had an outstanding Ethics Day Seminar on March 8th at Drake University. There were over 170 registrants at this event. This was definitely a record breaker for our annual Ethics Day event. I would like to thank the Kelley Insurance Center, DMAIFA, and SFSP who were co-sponsors along with the Iowa Chapter. Our speaker was Harry Burton, a retired FBI agent from Baton Rouge, Louisiana. Mr. Burton certainly had some fascinating comments and stories about the importance of ethics.

On March 22 we hosted a National Leadership Institute on "Ethical Decision Making for Insurance Professionals" taught by Jim Jones, CPCU. The following day we hosted the seminar at Pharmacists Mutual in Algona with over 60 participants.

April also promises to be a busy month. On April 5th, Donald Malecki, CPCU will be teaching two seminars at Farm Bureau Insurance. The morning session is "Additional Insureds and Certificate of Insurance Issues". The afternoon session will be on the "Course of Construction Policies and Installation Floaters". Mr. Malecki is one of the nation's premier insurance experts. If you have never heard Don, don't miss out on these great seminars.

I would like to thank this opportunity to thank Farm Bureau for providing the facilities to hold these seminars.

I would like to take this opportunity to announce the Burkhalter Award, which is a new award that the Iowa Chapter will be presenting at our 2007 I-Day seminar. This award is to honor Louis Burkhalter, the first CPCU in Iowa and our first president. Over the next few weeks, I hope you will do some thinking about someone who you feel would be a worthwhile recipient of this award. A nomination form is included in this issue of the Chaptergram.

Our April meeting will be on the 19th at Des Moines Golf & Country Club. Bob Fulwider, President-elect of the Independent Insurance Agents & Brokers of America will be our speaker at the luncheon. This will also be our annual business meeting. The nominations committee will present the slate of officers and directors to be elected for the 2007-2008 year. Please plan on attending to hear this outstanding speaker and also participate in the important business of the Iowa Chapter.

Since spring is here, it is time to start thinking about our annual charity golf outing. The event will be held this year on May 30th at the Legacy Course in Norwalk. Proceeds will go to help support the Fire Safety House at Blank Children's Hospital. I have a personal goal of being able to present a check in excess of \$3,000 to Blank Hospital to benefit the Fire Safety House. That amount will put us over the \$10,000 mark for cumulative donations which will enable the Iowa Chapter to be shown on the permanent section of the Donor's Tree...lets make this goal!

Wade Sheeler, CPCU
Iowa Chapter President

"Genius is one percent inspiration and ninety-nine per cent perspiration. Accordingly, a "genius" is often merely a talented person who has done all of his or her homework".

"The three things that are most essential to achievement are common sense, hard work and stick-to-it-iv-ness".

Thomas Alva Edison (1847 - 1931)



Do You Know?



Phil Stafford, CPCU, AU

Occupation: Commercial Product Manager—Product Development, Continental Western Group

Background: Bachelors Degree in Business Administration and Economics, Wartburg College; Claims Adjuster, Commercial Underwriter, and R&D Specialist, Grinnell Mutual Reinsurance Co., 1987-1998; Financial Representative, New England Financial/Financial Services of Iowa, 1998-2000; Commercial Underwriter and Team Leader, Continental Western Group, 2000-2002; Product Manager - Product Development, Continental Western Group, 2002 to present; CPCU designation, 2003.

Off-the-Job Interests: Most of free time is spent following activities of Zachary (age 15) and Cierra (age 12). Love the Iowa Hawkeyes (Steve Alford must go!), and spend Saturday afternoons in the fall at Kinnick Stadium. Cautiously admit that I'm also a Vikings and Cubs fan. What little free time is left is spent on the golf course.

Iowa CPCU Caps and Visors



Now you can wear a stylish cap or visor with “Iowa CPCU Society” on the front and our web site address “www.cpcu-iowa.org” on the back! The caps and visors are a high quality pigment-dyed cotton twill in khaki or faded blue with contrasting stitching, and the caps are a low profile, 6-panel baseball design with embroidered eyelets. The caps have an antique brass snap closure on self fabric, and the visors have a self-fabric Velcro closure. One size fits all.

The caps and visors will be available at monthly meetings and the annual golf outing... and the best part is the price—only \$5!

So... be stylish and spread the word about CPCU!

Salutations & Adieus

The Iowa Chapter welcomes the following CPCUs who have transferred into our chapter.

Jeffrey H. Farthing, CPCU, Nationwide Insurance Company, transferring from the Columbus Chapter

Jason W. Lacey, CPCU, Allied Insurance, transferring from the Nebraska Chapter

Roger D. Haist, CPCU, Farmers Union Co-op Insurance, transferring from the Omaha Chapter

Debra A. Kressig, CPCU, Kensington Pointe, transferring from the Kansas City Chapter

Karen Reilly, CPCU, Continental Western Group, transferring from the Cedar Valley Chapter

Steve Quinn, CPCU, State Farm, transferring from the Nebraska Chapter

And we bid farewell to these CPCUs who have moved from our chapter to others.

Steven K. Andersen, CPCU transferring to the Columbus Chapter

Mark A. Berven, CPCU, transferring to the Greater Richmond Chapter

Timothy M. Dorr, CPCU, transferring to the Bermuda chapter

Peter M. Gutsell, CPCU, transferring to the Vermont chapter

Anthony C. Kimmi, CPCU, transferring to the Kansas City chapter

Karen Floden, CPCU, transferring to the Dairyland Chapter

Burkhalter Award

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 the Iowa Chapter of CPCU, c/o AML Ltd., 100 East Grand Ave Ste. 330, Des Moines IA. 50309.
4. Nomination deadline is October 1st.
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 of CPCU, c/o AML Management, Ltd, 100 East Grand, Suite 330, Des Moines, IA. 50309. Deadline for submission: October 1st.

www.cpcu-iowa.org



JOIN US FOR THE

2007 ANNUAL CPCU GOLF OUTING

Wednesday, May 30, 2007

The Legacy Golf Club - Norwalk, Iowa

12:00 PM Shotgun Start



Mark your calendar for an afternoon of golf. Our outing is a Best Ball tournament open to not only CPCU's, but all insurance industry employees, family, friends and business associates.

The entry fee includes green fees for 18 holes, range balls prior to tee time, use of a cart with GPS, real time scoring, and dinner. There will also be a \$2,500 Hole-in-One contest, (sponsored by First Western) a \$5,000 putting contest (Sponsored by Safelite Auto Glass), and "Hit the Windshield and win \$500" Contest (Sponsored by Auto Glass Center).

If you prefer, you can join us for GOLF ONLY or DINNER ONLY as well. If you do not have a complete foursome, let us know and we will match you up. Dinner will begin at 5:00 p.m. Prizes will be awarded during dinner.

This year our chapter will be raising money to support the **Blank Children's Hospital Fire Safety House**.

Fees may be paid by credit card by **registering at** CPCU-iowa.org or by cash or check at the door.

For Questions, please call Jeffery Vail, CPCU at 515-224-9896 or email at vailj2@nationwide.com

Please email, fax, or mail your CPCU Golf Outing Reservation to:

Jeffery A. Vail, CPCU
150 S. Prairie View Drive
W. Des Moines, IA 50266
Office: (515) 224-9896
Fax: 515-224-2390
vailj2@nationwide.com

or

Iowa Chapter CPCU
c/o Association Mgmt. Ltd.
100 E. Grand, Suite 330
Des Moines, IA 50309
Fax: 515-243-2049
CPCU-iowa@aml.org

Golfer #1:

Name: _____ Golf & Dinner \$75
Phone No: _____ Golf only \$60
Email: _____ Dinner only \$20
Agency/Company _____

Golfer #2:

Name: _____ Golf & Dinner \$75
Phone No: _____ Golf only \$60
Email: _____ Dinner only \$20
Agency/Company _____

Golfer #3:

Name: _____ Golf & Dinner \$75
Phone No: _____ Golf only \$60
Email: _____ Dinner only \$20
Agency/Company _____

Golfer #4:

Name: _____ Golf & Dinner \$75
Phone No: _____ Golf only \$60
Email: _____ Dinner only \$20
Agency/Company _____

2007 Leadership Summit

2007 Leadership Summit and CPCU Society National Leadership Institute

April 18-21, 2007

Orlando



The Society's annual spring Leadership Summit is coming to Orlando! Join us and other CPCU Society volunteer leaders for this engaging leadership and career development event.

Attending the 2007 CPCU Society Leadership Summit shows your commitment to your professional development, and your participation will allow you to grow your skills as a CPCU Society volunteer leader. Chapter leaders will undergo in-depth training, allowing them access to the resources and skills to create stronger and more effective chapters.

The Summit combines five major CPCU Society leadership events into one exciting program: CPCU Society National Leadership Institute (NLI) courses, chapter leader training, Board of Governors meeting, business meetings, and section committee meetings.

Members and nonmembers are invited to attend NLI courses on April 19-20, 2007. Chapter leader training is open to all chapter leaders. The Board meeting, business meetings, and section committee meetings are open only to members of these groups.

The **National Leadership Institute** is proud to present an exceptional array of leadership and career development educational sessions for the attendees of the 2007 Leadership Summit.

Register today, and you will be on your way to building a stronger CPCU Society network, learning new skills, and gaining more confidence in addressing emerging business issues.

Thursday, April 19 • Luncheon

Experience the intriguing viewpoints presented by **Daniel S. McGarvey, CPCU**, in his presentation, "Leading from the Middle." McGarvey a graduate of the U.S. Naval Academy and currently serving as a managing director for Marsh's Nuclear Practice, says that most real leadership takes place in the middle of the organization. His presentation will help you use your leadership talents to maximize organizational impact.

Friday, April 20 • Luncheon

Hear how key industry professional **John DiLiberto, CPCU, CLU, ChFC**, of Island Drafting and Technical Institute in Amityville, NY, stays on track for success and creatively addresses today's leadership challenges. His presentation, "Just a Little Bit," provides his insights into volunteerism and volunteers based on his experience of more than 30 years of personal service. His inspiring presentation strikes close to the heart of anyone who has played a leadership role in an organization and had to ask for help.

Saturday, April 21 • Luncheon

Take a break from a full day of training and re-energize with Society leaders at Saturday's luncheon. Hear keynote speaker **Cynthia D'Amour**, a leadership strategist and coach, pave the way for building leadership in your chapter. She will present findings from her latest research on identifying future leaders and the key elements chapters can change to attract today's volunteer leaders. D'Amour is the author of several books including, *How to Turn Generation Me into Active Members of Your Association* and *Go Team Go, Strategy for Leading Today's Teams to Victory*. You will be inspired by her remarks and equipped with tools to make a difference in the upcoming year!

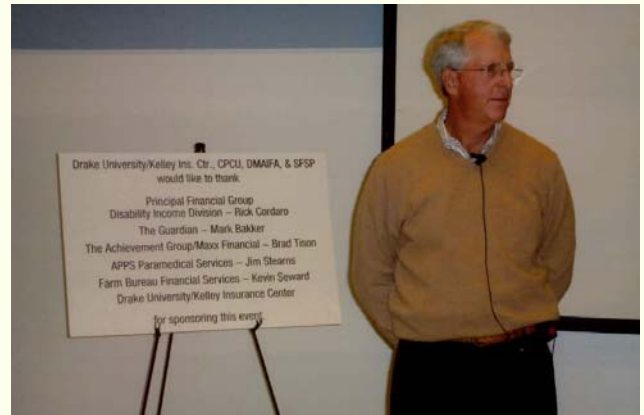
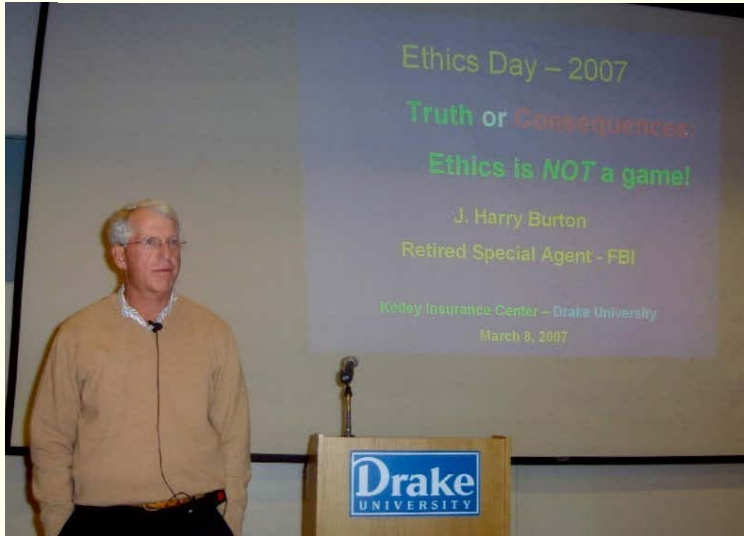
Recap of Ethics Seminars

The "Ethical Decision Making for Insurance Professionals" seminars held on March 22nd at Farm Bureau Insurance in West Des Moines and on March 23rd at Pharmacists Mutual Insurance in Algona were a huge success. As part of the CPCU Society's National Leadership Institute it was co-sponsored by the Iowa Chapter of CPCU. Pictured below is Jim Jones, CPCU, AIC, AAM, AIS presenting the program in Algona.



Recap of Ethics Seminars continued

A third Ethics day seminar was held on March 8th at Drake University where the Iowa Chapter of CPCU joined the Kelley Insurance Center, DMAIFA and SFSP in putting on a program. Pictured is Harry Burton, a retired FBI agent from Baton Rouge, Louisiana who was our presenter. Other co-sponsors included: The Principal Financial Group, The Guardian, The Achievement Group, Inc/Maxx Financial, APPS Paramedical Services and Farm Bureau Financial Services.



2007 CPCU Events

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 11:30	Des Moines Golf & Country Club	Bob Fulwider National President-Elect Independent Insurance Agents—“Where Have We Been and Where are We Going”
Thursday, May 17, 2007 11:30-1:45	Hoyt Sherman Place	Marvin Knoot —“Fish! Leadership Program”
Thursday, May 17, 2007 5:00 p.m. (social hour) 6:00 p.m. (dinner) 6:45 p.m. (program)	Olmsted Center, Drake University	Iowa Insurance Hall of Fame
Wednesday, May 30, 2007 12:00	Legacy Golf Course, Norwalk	Golf Outing

Chapter Meeting

Date & Time	Thursday, April 19, 2007 11:30 a.m. — 1:30 p.m.
Location:	Des Moines Golf & Country Club
Speaker:	Robert Fulwider, National President-Elect of the Independent Insurance Agents & Brokers of America
Topic:	Where Have We Been and Where are We Going?

DESCRIPTION: The April meeting will be held on Thursday, April 19 from 11:30 - 1:30 at The Des Moines Golf & Country Club. Robert Fulwider, National President-Elect of the Independent Insurance Agents & Brokers of America will speak on the direction of the insurance industry with his topic "Where Have We Been and Where are We Going". We also will conduct the election of Officers and Directors for the 2007-2008 chapter year.

To enable us to have an accurate count for food purposes, please call, fax or e-mail reservations by April 13, 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.
100 East Grand
Suite 330
Des Moines, Iowa 50309

Name(s): _____

Company: _____ Total Enclosed: \$ _____
Cost: \$20 per person