



Iowa ChapterGram

CPCU Society Iowa Chapter

May 2009

www.cpcu-iowa.org

2008-2009 Officers

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Upcoming Events

Thursday, May 21	Foxboro Conference Center in Johnston	Speaker: Jim Jones Topic: Insurance Industry and Sustainability
Thursday, May 21	Olmsted Center Drake University	Iowa Insurance Hall of Fame Ceremony
Monday, June 8	Copper Creek Golf Course in Pleasant Hill	2009 CPCU Golf Outing

It's difficult to believe that the CPCU year is winding down. Even though the year is almost over, there are still opportunities to participate in chapter events. Our next monthly meeting is May 21, where our regional governor, Jim Jones, will be speaking about Insurance Industry Sustainability. Jim will also perform the installation of our officers for 2009-2010. Our golf outing is June 8 at Copper Creek. Registration details can be found in this edition of the ChapterGram. The charity for our golf outing this year is Embrace Iowa: 2008 Iowa Disaster Fund, which focuses on providing assistance to those individuals affected by the natural disasters in 2008.



In addition to our own chapter events, you will want to register for the Iowa Insurance Hall of Fame ceremony scheduled for May 21. This year, we are honored to have three individuals with the CPCU designation inducted into the Iowa Insurance Hall of Fame: Dan Agnew, President of Grinnell Mutual; Lawrence Matthews, retired independent agent; and George Kochheiser, Retired President, EMC Insurance.

Being an active member of the CPCU Society is a rewarding experience. There are volunteer opportunities at the local and the society level. Our chapter has a 'volunteer' link on our web site (www.cpcu-iowa.org) for anyone interested in learning more about Iowa Chapter volunteer opportunities. For those interested in volunteering at the Society level, the CPCU Society's web site (www.cpcusociety.org) includes a listing of volunteer opportunities.

In these difficult economic times, individuals may be seeking career opportunities. If so, you may want to consider reviewing the CPCU Society Job Network. This can be accessed by a link from our chapter's web site or by going to the Society's web site and clicking on the career center/job network link. In addition to the job network, the Society has other career management resources available.

Our chapter is constantly looking for better ways to respond to our members needs. This year we did a brief survey of our chapter's new designees from 2006 through 2008 with the focus being on the best way to communicate with our members. We appreciate the suggestions for improvement from the 46 individuals who responded. The results of the survey are posted on our chapter web site.

In closing, I would like to thank the Iowa Chapter officers, directors, and committee members for their contributions this past year. At the beginning of the year during our planning session, we marked our planned activities on our Circle of Excellence form, which is posted on our web site. During the past few months, we have been reviewing what activities have been accomplished and we've actually accomplished more than we planned. This didn't happen by accident. It happened because everyone went above and beyond their 'call of duty'. The most rewarding part of being the chapter President has been to work with individuals who are dedicated to making our chapter the best. It has been an honor and a privilege to serve our chapter. Thank you for allowing me the opportunity.

Jody Ochsner, President, Iowa Chapter CPCU

"A life spent making mistakes is not only more honorable but more useful than a life spent doing nothing."

— [George Bernard Shaw](#),
Nobel laureate in literature

Sheila Reese, CPCU

Occupation: Commercial Lines Underwriting Supervisor
—EMC Insurance Companies

Background: Graduated from The University of Iowa in 1981 with a Bachelor of Business Administration/Marketing. Started with EMC in 1982 and has held various underwriting positions. Earned CPCU in 1989, and has completed AU, ARM-P, and CIC.

Off-the-Job Interests: “Antiquing” – a member of Questers, boating/ waterskiing, and family time. Is a volunteer/partner for Iowa Youth Homeless Shelters. Currently studying for IR -201 – Insurance Regulation.



2009 Annual Meeting & Seminars



Experience ‘CPCU—Embracing Changes’ at the 2009 Annual Meeting and Seminars

Join CPCUs, new designees and insurance industry leaders in Denver, Colo., to develop the technical and leadership skills you need to stay competitive. And make important business connections that can pave the way for new career opportunities.

2009 Iowa Chapter of CPCU Golf Outing

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Join us for the 2009 Annual CPCU Golf Outing
Monday, June 8th, 2009
Copper Creek Golf Course – Pleasant Hill, Iowa
1:30 PM Shotgun Start
Registration and golf range opens at 12:30

Please mark your calendar for an afternoon of great golf. Our outing is a Best Ball tournament open to CPCU's along with 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 and real time scoring plus dinner after the golfing. There will be prizes for the place winners in 2 flights along with contest holes such as longest drive, closest to the pin and more.

If you prefer, you can join us for GOLF ONLY or DINNER ONLY as well. If you do not have a complete foursome we will try to match you up. Dinner will begin at 6:00 p.m. Prizes will be awarded during dinner.

This year our chapter will be raising money to support the Embrace Iowa: 2008 Disaster Fund.

Fees may be paid by credit card by registering at www.CPCU-Iowa.org or by mailing the registration form with a check with full payment to:

CPCU of Iowa Golf Outing
C/o Association Insight
4554 114th St.
Urbandale, Ia. 50322

Any questions please contact either:

Dorothy Reser, CPCU at 515-508-7348 or e-mail her at reserd@nationwide.com or

Brian Wright, CPCU, AIAF at 515-345-2686 or e-mail him at brian.w.wright@emcIns.com

Golfer #1: _____

Agency/Company _____

Email: _____

Phone No: _____

☐ Golf & Dinner \$65 ☐ Golf only \$55

☐ Dinner only \$20

Golfer #2: _____

Agency/Company _____

Email: _____

Phone No: _____

☐ Golf & Dinner \$65 ☐ Golf only \$55

☐ Dinner only \$20

Golfer #3: _____

Agency/Company _____

Email: _____

Phone No: _____

☐ Golf & Dinner \$65 ☐ Golf only \$55

☐ Dinner only \$20

Golfer #4: _____

Agency/Company _____

Email: _____

Phone No: _____

☐ Golf & Dinner \$65 ☐ Golf only \$55

☐ Dinner only \$20

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 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 Association Insight
4554 114th Street
Urbandale, IA 50322
4. Nomination deadline is October 1st.
5. The award will be presented at the annual I-Day seminar.

Burkhalter Award Nomination Form

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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 Association Insight
4554 114th Street
Urbandale, IA 50322

Deadline for submission: October 1st.

www.cpcu-iowa.org

Iowa Insurance Hall of Fame Ceremony

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On May 21st, the Iowa Insurance Hall of Fame is having their 13th annual ceremony to induct 5 new members , including the following 3 CPCUs.



Larry Matthews, CPCU, was a Charter Member of the Iowa Chapter and our third president for the 1954-55 year. He owned his own agency, Witmer-Kauffman-Evans until selling it to KVI in 1982.



George Kochheiser, CPCU, was the twenty first president for the 1972-73 year. He retired as President of EMC Insurance Companies.



Dan Agnew, CPCU, is President of Grinnell Mutual Reinsurance at Grinnell and is also a member of the Grinnell sub chapter.

You are cordially invited to
attend the *Thirteenth Annual*
**IOWA INSURANCE HALL
OF FAME CEREMONY**

Thursday May 21, 2009 • Olmsted Center, Drake University
Social 5:00 - Dinner 6:00 - Program 6:45
\$30 per person - Business Dress - Reserved Tables of 8 available for \$300

Submit reservations by May 14th to
Melissa Meiners
Iowa Insurance Hall of Fame
% Independent Insurance Agents of Iowa
4000 Westown Parkway
West Des Moines, IA 50266
Phone (515) 223-6060
E-mail: Melissa@IIAIowa.org


www.iihof.org

On May 1, 2009, the North Central Iowa Subchapter of the Iowa Chapter held the first CPCU Interest Day for their employer, Pharmacists Mutual Insurance Company. We had 25 people attend wanting to know about the CPCU program. We explained the process of becoming a CPCU and the advantages of having your CPCU Designation. Our current CPCUs explained how they achieved their designation, what worked for studying and what didn't work, how we handled discouragement and failed tests. Our new chapter mentoring program was released to them explaining how one of the current members of our chapter would help guide through the process and encourage them as they took their tests. We are very encouraged and we believe we will get more than a few people to sign up to start in the program. Hopefully we will be adding some candidates to our chapter and making them designees before long. It was a very successful day for our chapter.



Panel (Left—Right): Marilyn Deal, Sheryl McMahon, Rita Harder, Jon Grether, Tom Goodrich, Jody Ochsner, Linda Thilges



Group (Left—Right):
Linda Thilges, Doug Nuehring, Jon Grether, Kris Laubenthal, Jody Ochsner, Lisa Molsberry,
Kirk Hayes, Denise Bolleson, Lori Walton, Ted Lussem, Rick Atkinson, Rita Harder



2009 CPCU Events

Thursday, May 21, 2009 11:30-1:00	Foxboro Conference Center in Johnston	Speaker: Jim Jones, Regional Governor Topic: Insurance Industry and Sustainability Note: Installation of Officers
Thursday, May 21, 2009	Olmsted Center Drake University	Iowa Insurance Hall of Fame Ceremony
Monday, June 8, 2009 1:30	Copper Creek Golf Course in Pleasant Hill	2009 CPCU Golf Outing

Scholarship Winners

The Iowa Chapter of CPCU Society recently awarded two \$1,500 scholarships in recognition of the recipient's achievements and to continue with their education. Brad Kneeskern and Jessica Langenberg were chosen by the committee as the recipients.



Brad Kneeskern
(Ted Lussem Achievement
Scholarship)

Brad (son of Lisa Kneeskern, CPCU who works at Farm Bureau) is a graduate of Urbandale High School. At Urbandale, he was active in baseball and football, as well as graduating with honors. Brad is currently a sophomore at the University of Iowa as a Finance major. His hobbies include racquetball, ultimate frisbee, and card games.



Jessica Langenberg

Jessica (daughter of Angela Langenberg, CPCU who works at Allied/Nationwide) is a graduate of Newton High School. At Newton, she was on the honor roll every semester in high school and was a member of DECA. Jessica is currently a Sophomore at the University of Iowa majoring in Business. She has been on Iowa's Dean's List and has been nominated for The National Scholars Society. Her extracurricular activities include volunteering for the American Heart Association and for the Iowa Men's Volleyball tournament organization.

Chapter Meeting

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Date & Time	Thursday, May 21, 2009, 11:30 a.m.
Location:	Foxboro Conference Center, 6163 NW 86th St. Johnston, Ia
Speaker:	James R. Jones CPCU, AIC, ARM, AIS Director of the Katie School of Insurance and Financial Services Illinois State University
Topic:	"Insurance Industry and Sustainability"

DESCRIPTION:

A trend toward focusing on the "triple bottom line," People—Planet—and Profits, has continued to grow in importance for businesses as customers, employees, and investors demand greater accountability for social corporate responsibility. A trend that began in Europe and Australia has now caused U.S. employers to reconsider business issues ranging from worker health and safety, employee morale and engagement, and corporate governance, to societal issues of entrenched poverty and global warming. Insurance organizations are increasingly seen as necessary participants in sustainability as they are affected by climate change, and have a vital role in lubricating the "engine of commerce". Regardless of your role, function, position or company, this trend will eventually affect what you do. Come hear what insurance organizations are doing with respect to sustainability.

Jim, who is the Iowa Chapter's CPCU Society Governor will also be installing the Chapters new officers.

The meeting begins at 11:30 at the Foxboro Conference Center at 6165 NW 86th St. in Johnston.

To enable us to have an accurate count for food purposes, please mail or e-mail reservations by May 15th to 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) 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.