



CPCU
SOCIETY

ChapterGram

Iowa CPCU Society Chapter

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CPCU Society Social Media



March 2016

www.cpcu-iowa.org

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Upcoming Events

Tuesday, March 29
5:30 pm

Ankeny DMACC
Bistro, BLD 7

March Chapter Meeting

Tuesday, April 19, 2016
11:30 am

Glen Oaks

April Chapter Meeting

Message from the President

March is Ethics Awareness month! In the past, we have sponsored a ½ day ethics continuing education seminar at Drake with other financial/ insurance industries in our community. This year, we are going to try a new approach.

For our chapter meeting in March, we will meet for dinner at DMACC Bistro. The talented culinary arts students will prepare our dinner and one of our very own CPCUs, Russ Sporrer, will speak on ethics. This venue will give us the opportunity to network with each other and not have to hurry back to work! I look forward to seeing you March 29th, at 5:30 pm.



For those of you out there who are interested in getting involved in the leadership of our chapter, we are actively looking for two additional volunteers for our board. The national society is encouraging chapters to have their own Diversity Committee. In 2001, CPCU Society leadership established a Diversity Task Force charged with developing recommendations “to increase minority and gender participation at the local and national level of the CPCU Society by creating a positive and progressive environment for participation.” The recommendations were to align with the Society’s strategic plan goals of (1) increasing visibility of the CPCU designation; and (2) providing educational programs to members to position them for success.

In addition to the board positions we are also looking for a volunteer to work with our Champions. CPCU Society Champions are members who, due to their level and position within a firm, can “take the pulse” of the organization and update the Society about evolving needs and issues. Champions are also asked to facilitate two-way communications between the Society and their companies. Finally, these members “champion” the cause of the Society and the CPCU® designation throughout their firm and their industry.

If you have any interest in volunteering for these positions, please contact me or to learn more please take a look at the CPCU membership [website](#).

Bob Conroy spoke about the Iowa FAIR Plan at our February meeting. I have always been interested in FAIR Plans and it was easy to stay engaged to learn from this presentation. What did I learn at our February meeting? I can’t give you only one, so here are three!

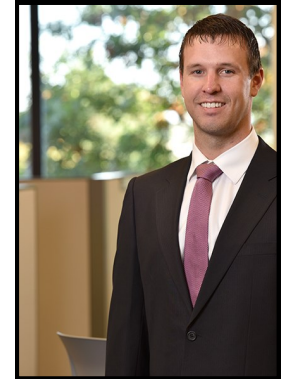
- They do not write vacant or damaged homes.
- They write dwelling fire and HO8 policies. The HO8 policy includes liability.
- Fair Plans were started in the late 60’s due to the Fair Access to Insurance Requirements.

If you’re like me and have an interest in the FAIR plan, check out their website <http://iowafairplan.com/> for more information.

- Dalith Wells, President, Iowa Chapter

New Designee Spotlight

Dave Boeckman, CPCU
Holmes Murphy
Client Service Consultant, PC



I started my insurance career just over 5 years ago with Auto-Owners Insurance in West Des Moines. Like the majority of people who enter into the insurance industry I did not know what to expect. I was thrilled to start a job in which I could call it a "career." Auto-Owners promoted professional development, whether it was insurance continuing education or personal development such as Dale Carnegie Training. I knew when I started that I needed to dive in head first. Initially, I was hesitant to start taking CPCU tests, I was new to the industry and thought that the CPCU may be over my head. Instead of starting right with the CPCU tests I began with the AINS designation. After completing the AINS my next objective was to sign up and begin the CPCU process. I thought the day would never come where I would actually complete the process.

Since I initially started working towards my CPCU many things changed, I've changed positions within insurance from being an underwriter to the agency side with Holmes Murphy & Associates in 2014. Like my first job within the industry, Holmes Murphy promotes continuing education and has provided the same tools and resources to accomplish one of my first goals I set when I first began over 5 years ago. This is one of the multiple ways Holmes Murphy strives to be the employer of choice for insurance professionals. I have been very fortunate in the past 5 years not only on what I have learned, but also the relationships I have made in this relatively short time working in the insurance industry.

Outside of work, I've been married to my wife Liz for just over a year and we are excited to be expecting our first child in August. We both enjoy traveling, bicycling, golfing and make frequent trips back to our hometowns of Breda and Carroll, Iowa to spend time with our family.

My advice for anyone considering obtaining their CPCU designation is to jump right in. Besides the amount of knowledge that you learn from the completion of each test you become part of a great group, the CPCU Society and specifically the Iowa Chapter are great groups to be a part of.

2016 Scholarship for Iowa Chapter Members

This spring the Iowa CPCU Society Chapter will be awarding up to one \$1,000 scholarship to Iowa Chapter members and/or their dependents. This has been a very successful program and we are glad to continue to offer this opportunity to our members.

The scholarship is available to graduate and undergraduate students. To be eligible, graduate applicants must be an Iowa CPCU Society Chapter member and attend an accredited graduate college or university.

Please use the applicable form provided in this ChapterGram, where additional eligibility details can be found. The forms are also available on our website at www.cpcu-iowa.org and at the links below. Applications should be sent to Zach Hilton by March 11, 2016.

- [Undergraduate Scholarship Online Application](#)
- [Graduate Scholarship Online Application](#)

Undergraduate Scholarship Application

Iowa CPCU Society Chapter
2016 Undergraduate Scholarship Application

Scholarship Amount: \$1,000 toward tuition during recipient's sophomore, junior, or senior year.
Amount may be applied to spring, summer, or fall tuition.

Eligibility:

- Iowa CPCU Society Chapter members or one of their dependents; and,
- Sophomores, juniors, or seniors attending a four-year accredited college or university; and,
- 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 insurance-related area of study.

Applicant Name: _____

Mailing Address: _____

City/State/Zip Code: _____ Phone: _____

Permanent Mailing Address: _____

City/State/Zip Code: _____ Phone: _____

Email Address: _____ CPCU Member Name _____

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 11, 2016:

- A résumé that includes information regarding applicant's scholastic honors, extracurricular activities, employment history and other information you believe is important for consideration.
- 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 and list the insurance courses that you have taken or plan to take.

Please mail the completed application, résumé, and statement to:

Zach Hilton, CPCU
Iowa CPCU Society Chapter
c/o EMC Insurance Companies
Box 712
Des Moines, IA 50306-0712

Alternatively, you can email the documents to Zachary.F.Hilton@EMCIns.com.

Graduate Scholarship Application

Iowa CPCU Society Chapter
2016 Graduate Scholarship Application

Scholarship Amount: \$1,000 toward tuition at an accredited graduate college or university. Amount may be applied to spring, summer, or fall tuition.

Eligibility:

- a. Iowa CPCU Society Chapter members only; and,
- b. Attending an accredited graduate college or university

Applicant Name: _____

Mailing Address: _____

City/State/Zip Code: _____ Phone: _____

Permanent Mailing Address: _____

City/State/Zip Code: _____ Phone: _____

Email Address: _____ Graduate Program: _____

Please complete and return this form and the following information by Friday, March 11, 2016:

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. Please state why your graduate degree will help you on your path to your career goals. Also, please list graduate level insurance courses you have taken or plan to take.

Please mail the completed application, résumé, and statement to:

Zach Hilton, CPCU
Iowa CPCU Society Chapter
c/o EMC Insurance Companies
Box 712
Des Moines, IA 50306-0712

Alternatively, you can email the documents to Zachary.F.Hilton@EMCIns.com.

Cerie Garton 1951 - 2016



The Iowa CPCU Society Chapter was saddened to hear of the recent passing of Cerie Garton.

Cerie was born March 12, 1951 in Chariton, Iowa to Tom and Jane Garton. She graduated from Hoover High School and spent most of her career in the insurance industry. Cerie enjoyed traveling, going to concerts and spending time with friends and family typically around the dining room table. You would often find her at the Civic Center, where she was a season ticket holder. Cerie was best known for her annual Christmas brunch.

Cerie is survived by her sisters, Julie (Bob) Fetters and Wendee Molano; nieces and nephews, Adam and Michelle Fetters, Amanda and Matt Scherbring and Sophia Molano; great nephew, Fox Fetters; her "other mother", Marge Watsabaugh and Marge's sons, Dennis and Doug and their families. She is also survived by several aunts, uncles, cousins and friends. She was preceded in death by her parents. Memorial contributions may be given to NARAL or NORML.

Cerie's obituary and tribute website can be found [here](#). She served as the 45th President of the Chapter from 1996-1997 and continued to volunteer her time since. Her warm demeanor and giving spirit will be sorely missed by the Chapter.



Cerie accepting the CPCU Excellence award.



Cerie with Bob Conroy.

2016 CPCU Chapter Meetings

March 29, 2016 5:30 pm	Ankeny DMACC Bistro, Bld 7	Speaker: Russ Sporer Topic: Ethics
April 19, 2016 11:30 am	Glen Oaks	Speaker: Dean Brooks Topic: Certificates of Insurance
May 19, 2016 3:00 pm	State Capitol	Capitol Tour & Social Hour
September 13, 2016 11:30 am	Embassy Club	Speaker: Terri Vaughan Topic: Insurance Risk Management/ Drake Insurance
October 13, 2016 11:30 am	Greater Des Moines Botanical Center	Speaker: Pinnacle Topic: Claims
November 10, 2016 7:30 am	Prairie Meadows	I-Day 2016
December 15, 2016 3:00 pm	Wakonda Club	Speaker: Alison Cate Topic: Soft Skills

2016 Iowa CPCU Society Chapter Schedule		
January 21	11:30 am	Des Moines Social Club
February 16	11:30 am	Sheraton WDM
March 29	5:30 pm	Ankeny DMACC Bistro
April 19	11:30 am	Glen Oaks
May 19	3:00 pm	State Capitol
September 13	11:30 am	Embassy Club
October 13	11:30 am	Des Moines Botanical Center
November 10	7:30 am	Prairie Meadows
December 15	3:00 pm	Wakonda Club

Update your schedule magnet and save the dates for our 2016 meetings. We look forward to seeing you soon.

Chapter Meeting

Date & Time Tuesday, March 29, 2016, 5:30 pm

Location Ankeny DMACC Bistro, Bld 7

Speaker Russ Sporer

Topic Ethics

Russ Sporer has been active in the Iowa insurance industry for over 40 years. In that time he has been involved in many facets of the discipline: instructor, agent, owner, principal, producer, expert witness, E&O auditor, and consultant. He is an expert in not only property and casualty insurance products, but life and health products as well.

Russ has been an agency owner and principal of the NOEL Insurance Agency, Inc., in Ottumwa, Ia. As an independent agent he has served as a board member and president of the Ottumwa Independent Agents Association and the Independent Insurance Agents of Iowa. He has served on committees and task forces of the Independent Insurance Agents and Brokers of America and upon two occasions was selected as Iowa's Agent of the Year.



Russ' complete bio can be read [here](#).

To enable us to have an accurate count for food purposes, please mail or e-mail reservations by **March 15, 2016** to:

debbie.conroy@cpcu-iowa

Or make checks payable to: Iowa CPCU Society Chapter
 Mail checks to: Iowa CPCU Society Chapter
 Attn: Debra R. Conroy, CIIP, CIC
 1000 73rd St Ste 18
 Windsor Heights, IA 50324

Name(s): _____

Company: _____ Total Enclosed: \$ _____
 Cost: \$25 per person

To register by credit card, visit our chapter website (www.cpcu-iowa.org) and click on the link on the main page under Events. For questions about the meeting, not concerning reservations, please call Adam Haugerud (515) 508-5435.