



#### **2012-2013 Officers**

President:  
Connie Doud  
(515) 724-5092  
Connie@fmh.com

Vice President:  
Erin Osier  
(515) 223-6998  
eosier@yourcaptive.com

Secretary:  
Kim Smetzer  
(515) 365-4340  
kim.smetzer@marshpm.com

Treasurer:  
Rose Nwaturuocha  
(515) 508-3386  
Nwaturr@nationwide.com

Past President:  
Richard Keith  
(515) 327-2755  
Richard.Keith@theimtgroup.com

#### **Directors**

Dalith Wells  
(515) 345-2542  
Dalith.M.Wells@EMCIns.com

Jon Williams  
(515) 345-2671  
Jon.D.Williams@EMCIns.com

Adam Haugerud  
(515) 508-3435  
haugera@nationwide.com

Stephanie Wells  
(515) 508-2497  
Wellss5@nationwide.com



CPCU Society Social Media



# Iowa ChapterGram

## Iowa CPCU Society Chapter

May 2013

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

### **Contents**

Message from the President	2
New Designee Spotlight 2013 Scholarship Recipients	3
Gamma Iota Sigma - Chi Chapter at Drake University	4
Iowa Insurance Hall of Fame Ceremony Invitation Lloyd Pace: 1925 - 2013	5
2013 Golf Outing Registration Form	6
Chapter Meeting	7
IAGDM International Association of Insurance Professionals Event Registration	8

### **Upcoming Events**

May 16, 2013 7:30 am	Des Moines Golf & Country Club	Speaker: Laurie Mardis Topic: Investment Management
May 22, 2013 5:00 pm	Drake University	Iowa Insurance Hall of Fame 2013 Induction Ceremony
June 13, 2013 11 am	Legacy Golf Club	CPCU Charity Golf Event

## Message from the President

We had a very informative April meeting as John Flahaut of One Source Risk Management taught us about Trade Credit Insurance. This is a line of business many of us were not familiar with, but it appears to be a fast growing line and one that is very important to our economy as companies become more international. We hope you can attend our May meeting. It will be our last business luncheon until September as we take a break for the summer. It will be a breakfast meeting held at the Des Moines Golf and Country Club. The speaker for the May meeting is Laurie Mardis of Miles Capital, who will speak on investment management. In addition to our speaker, we will be recognizing this year's scholarship winners, Ryan Swalve and Jeff Nielsen, and awarding our Chapter Excellence Award. We hope you come out to support these award winners, and to take advantage of this learning/networking experience.



Another opportunity to show support for the insurance profession is the Iowa Insurance Hall of Fame Induction Ceremony and Banquet May 22 at the Olmsted Center on Drake Campus. Three CPCUs will be inducted. It is not too late to attend - see page 5 for information on registration.

We are excited to be joining in a relationship with our local Gamma Iota Sigma – Chi Chapter at Drake University. The CPCU Society is partnering with Gamma Iota Sigma chapters across the country offering to mentor and provide complimentary membership to the Society as we encourage the newest generation of professionals to the insurance industry. See page 4 of this ChapterGram for more information.

Also in this ChapterGram you can find registration information for our Charity Golf Outing on June 13. Form your own foursomes with friends or co-workers, fellow CPCUs, or even a new designee. This is a best ball tournament, so you don't have to be Tiger Woods to play. Enjoy the outdoors, network with other CPCUs, and support Blank Children's Hospital.

As I mentioned in last month's article, we will be electing new officers for the 2014 year in October and installing them at I-Day to begin their terms in January 2014. Programs for this fall are already being planned, so keep in touch. We have had several volunteers come forward and we welcome others to get involved as well. Let us know if you want to serve as a volunteer. Many hands make for light work and a truly great organization!

Enjoy your summer,

- Connie Doud, CPCU, CCP

*President, Iowa CPCU Society Chapter*



## New Designee Spotlight

**Jessica Hendricks, CPCU, CIC, AU  
Marketing Representative  
EMC Insurance**

I started my CPCU designation while in commercial underwriting at EMC and finished up after I joined our marketing team. I am currently an EMC Marketing Representative and travel western Iowa visiting our independent agency force. Agents in Iowa really respect the CPCU designation and it has been a great talking point throughout the year. I have enjoyed listening to their stories about completing the designation and going on the annual trip. It is definitely an unforgettable experience for many in our industry.



Since completing my CPCU and going to Washington, D.C. for the annual trip, my life has been full speed ahead. Over the past 8 months, I have started my MBA through the University of Iowa, completed my CIC designation, and sold, bought, and moved into a new home! Time really flies when you're having fun!

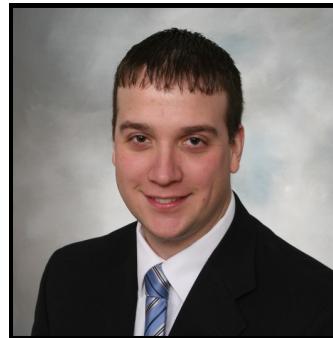
In my free time, I really enjoy working out, playing with my two nephews, and spending time with my husband and our yellow lab. I'm currently training for the Market to Market Relay Race and the Gladiator Assault with some college friends of mine.

## 2013 Scholarship Recipients

The recipients of the 2013 Iowa CPCU Society Chapter Scholarships are:

- **Ryan Swalve, CPCU.** Ryan works at Professional Solutions Insurance Services in West Des Moines and is currently working on his MBA from the University of Iowa. He received a BA in Sociology with a Business Minor in 2003, also from the University of Iowa. His professional designations include CPCU, AU, CISR, and the Certificate in General Insurance. His hobbies include biking, water-skiing, fishing, and hunting.

Ryan is this year's recipient of the Ted Lussem Scholarship.



- **Jeff Nielsen.** Jeff is a sophomore at the University of Iowa, majoring in Finance and Entrepreneurial Management. Jeff is the son of Beth and Tim Nielsen, CPCU, who works at GuideOne. Some of Jeff's hobbies are hanging out with friends, spending time outdoors, and watching/playing sports. He also enjoys Iowa Hawkeye sports, including working as a video manager for the Iowa football team. Jeff also participates in Iowa's Dance Marathon, raising money for kids with cancer.



## Gamma Iota Sigma - Chi Chapter at Drake University

Gamma Iota Sigma, the actuarial science and risk management fraternity, was first started in 1965. Drake's Chi Chapter of Gamma Iota Sigma originally started back in the 1980's, but had become inactive until it's re-chartering this past fall. Gamma is an international organization, creating a brotherhood between thousands of insurance students worldwide.

Each year, Gamma hosts an international conference consisting of keynote speakers, professional development education sessions, leadership development sessions, networking opportunities, and a two-day career fair. This past year, 36 different universities and 45 different insurance companies participated in the conference held on Navy Pier in Chicago, IL. At the time, our chapter at Drake only consisted of its five founding fathers, but we plan on inviting all of our new members to the 2013 international conference. If your company would be interested in sponsoring our chapter of Gamma and helping us to attend the 2013 conference, please let me know!

During the current spring semester, we had our first recruitment week for Gamma and now have accepted our first pledge class. There are 21 new students pledging the fraternity, which gives us a total of 26 students associated with our chapter. Because Drake does not have an insurance or risk management major, all of our members are majoring in actuarial science, although there are a few students interested in other careers within insurance, such as underwriting.

Our chapter of Gamma hosts several events throughout the semester, ranging from social to professional, including three presentations from experts in the industry. We have been trying to have two actuaries present because most of our members are interested in becoming actuaries, but we also want to bring in one other speaker per semester from a different field within the insurance industry in order to further inform our members of the many careers within the industry. If you or your company would be interested in giving a presentation for our chapter in the future, please contact me and we would love to schedule a presentation!

Finally, I would like to thank the Iowa CPCU Society Chapter for inviting us to get involved with the Society and for being so supportive in helping our fraternity grow and reach our goals!

Mike Jennings, Drake University 2015  
Actuarial Science and Finance with Insurance Concentration  
[Michael.jennings@drake.edu](mailto:Michael.jennings@drake.edu)  
Gamma Iota Sigma VP of Professionalism and Networking



## Iowa Insurance Hall of Fame Ceremony Invitation

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

Honoring these inductees for 2013:

**\*Clark E. Bening, Susan E. Haack, Richard C. Keith  
Merle "Bud" Ross, Susan E. Voss**

\*Awarded Posthumously

**Wednesday, May 22, 2013 • Olmsted Center, Drake University**

**Social 5:00 - Dinner 6:00 - Program 6:45**

**\$35 per person - Business Dress - Reserved Tables of 8 available for \$350**



[www.iihof.org](http://www.iihof.org)

DM-9000368096

**Submit reservations by May 17<sup>th</sup> 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](mailto:Melissa@IIAIowa.org)**

### Lloyd Pace: 1925 - 2013

On April 11, 2013, Lloyd C. Pace passed away at the Colorado State Veterans Home due to complications of Parkinson's Disease. Lloyd was born in rural Orient/Zion, attended North High School, served in the United States Coast Guard during World War II, and was a retiree from Continental Western Insurance Company as AVP and Director of Education. Lloyd received his CPCU designation in 1976 and was President of the Iowa CPCU Society Chapter in 1982-83.



## 2013 Golf Outing Registration Form

**Join us for the 2013 CPCU Golf Outing**

**Thursday, June 13, 2013**

**The Legacy Golf Club – Norwalk, Iowa**

**11:00 AM Shotgun Start**

**Registration and driving range open at 10:00 AM**

Come out and join your fellow CPCUs for an afternoon of fun at the Legacy Golf Club on June 13. This year our chapter will be raising money to support Blank Children's Hospital.

The entry fee includes green fees for 18 holes in a Best Shot format, range balls prior to tee time, use of a cart with GPS and real time scoring, plus dinner after golf. There will be prizes for the place winners in two flights along with contest holes such as longest drive, closest to the pin, and longest putt. You'll also win \$10,000 cash if you can sink a hole-in-one on #5. You could be the big winner!

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 around 5:00 p.m. and prizes will be awarded during dinner. The registration deadline is Wednesday, June 5, 2013.

Fees may be paid by credit card by registering at <http://cpcu-iowa.org/events/>

Fees may be paid by check by mailing the registration form and check with full payment to:

Iowa CPCU Society Chapter  
 Attn: Debra R. Conroy, CIIP, CIC  
 1000 73rd St. Ste. 18  
 Windsor Heights, IA 50324

Any questions please contact:

Brian Wright, CPCU, AIAF at 515-345-2686 or e-mail [brian.w.wright@emcins.com](mailto:brian.w.wright@emcins.com)

Stephanie Wells, CPCU, MPA at 515-508-2497 or e-mail [wellss5@nationwide.com](mailto:wellss5@nationwide.com)

Sarah Middendorf, CPCU, CIC at 515-440-8187 or [smiddendorf@chubb.com](mailto:smiddendorf@chubb.com)

<b>Golfer 1</b>		<b>Golfer 2</b>	
Agency/Company		Agency/Company	
Email:		Email:	
Phone no:		Phone no:	
Golf & Dinner \$80	Golf Only \$70	Golf & Dinner \$80	Golf Only \$70
Dinner Only \$20		Dinner Only \$20	
<b>Golfer 3</b>		<b>Golfer 4</b>	
Agency/Company		Agency/Company	
Email:		Email:	
Phone No:		Phone No:	
Golf & Dinner \$80	Golf Only \$70	Golf & Dinner \$80	Golf Only \$70
Dinner Only \$20		Dinner Only \$20	

## Chapter Meeting

Date & Time                      Thursday, May 16. 7:30 am

Location                              Des Moines Golf and Country Club ([map](#))

Speaker                                Laurie Mardis

Topic                                    Investment Management

### Speaker Bio:

Laurie is Director, Fixed Income for Miles Capital and a member of Miles Capital's Fixed Income Research Committee and Asset Allocation Committee. She earned her Bachelor of Business Administration and Master of Business Administration degrees from Drake University. She earned her Chartered Financial Analyst (CFA) designation in 1998. Ms. Mardis is a current member and a past President of the CFA Society of Iowa. Prior to joining Miles Capital in 2001, she was an investment manager with Wells Fargo managing proprietary fixed income insurance and ERISA qualified accounts as well as balanced separate accounts.



To enable us to have an accurate count for food purposes, please mail or e-mail reservations by May 10, 2013 to:

[debbie.conroy@cpcu-iowa.org](mailto:debbie.conroy@cpcu-iowa.org)

Make checks payable to:            Iowa Chapter - CPCU

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](http://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 Erin Osier at (515) 223-6998.



## IAIP Week Observance with the Insurance Association of Greater Des Moines, Inc.

**Wednesday, May 8, 2013**  
**Holiday Inn & Suites at Jordan Creek**  
**6075 Mills Civic Parkway – West Des Moines, IA**  
**11:30 Networking 12:00 PM Lunch & Speaker**  
**Speaker – Suku Radia, CEO & Pres of Bankers Trust**

**IAIP Week: May 19-25, 2013** will be a week of celebration for the **International Association of Insurance Professionals**. Over 320 local associations, representing members from across the United States and 9 other countries will take part in various activities to commemorate the organizations' sixty-seven years of service to the insurance industry. The celebration has been a tradition since 1965 and highlights the importance IAIP places on providing professional education, an environment in which to build business alliances and the opportunity to make connections with people of differing career paths and levels of experience within the insurance industry.



**Speaker:** **Suku Radia**  
**CEO & President of Bankers Trust**  
[Click Here to View Speaker Bio](#)

**Topic:** **Qualities of a Great Leader**

**Reservation Deadline: May 1, 2013**

Please mail check, payable to Insurance Association of Greater Des Moines, and reservation form to:  
Marilyn Paul  
% Independent Insurance Agents of Iowa  
4000 Westown Parkway, Ste 200  
West Des Moines, IA 50266

Enclosed is my check for \$\_\_\_\_\_ for \_\_\_\_\_ reservation(s) at \$25.00 each

Name & Designations: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Employer: \_\_\_\_\_

\*For more information, contact Marilyn Paul at [Marilyn@iiaiowa.org](mailto:Marilyn@iiaiowa.org) or ph:515.223.6060,ext 11