

EASTERN NORTH CAROLINA NEWS

EASTERN NORTH CAROLINA CHAPTER OF CPCU Spring 2005

The President's Corner

As we near the end of another CPCU chapter year and I reflect on the number of great accomplishments we've had as a chapter, one idea or notion stands out in my mind – that of **teamwork**. In reviewing The American Heritage Dictionary (New College Edition - 1976), the definition of "teamwork" is as follows: "a cooperative effort by the members of a team to achieve a common goal".

As members of the CPCU Society and the Eastern North Carolina Chapter – Society of CPCU, we are members of a team, a team of insurance professionals dedicated to continuing education, professionalism and ethics within our industry.

The CPCU Society has the following two primary goals within its strategic plan and we share these goals at the chapter level:

Goal 1 – Make CPCU the most widely recognized, valued and highly respected professional designation/ brand in the property and casualty insurance industry by CPCU employers, key segments of the financial services industry and other important audiences.

Goal 2 – All Society members have access to a continually increasing number of programs and services that position them for success.

We've had a great chapter year, thanks to the many contributions of team members to our efforts and activities. Here are some highlights of these activities:

- 5 chapter breakfast or luncheon meetings with excellent attendance
- twelve new CPCU designees from the chapter
- a super I-Day/ CPCU conferment with over 100 attendees
- an enhanced (and being updated) website for communicating chapter events and activities

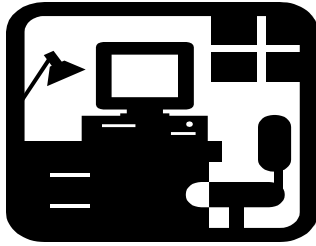
- regular newsletters providing chapter highlights
- good works projects that touch the community in which we live and work
- educational course offerings to meet the needs of our members
- and many more...

The Board of Directors has been busy this year planning and developing activities that bring value to our chapter membership. Many chapter members have volunteered over the year to help with these endeavors. I'd like to offer my sincere thanks and appreciation to Board Members and volunteers for their commitment, participation and assistance over this wonderful chapter year!

Teamwork – an often "overused" and "taken for granted" cliché. I'm proud to be a part of the Eastern North Carolina CPCU chapter team and to work with such a fine group of insurance professionals. What a great team we have!!! It's time to begin planning for the next chapter year. We'll soon be presenting the slate of officers for the membership to elect for the upcoming chapter term.

I'll close with my ongoing challenge....make a commitment to stay or get involved! Use your time and talents to help us take the chapter to the next level! Attend our chapter meetings! Become a chapter officer or committee head/ member! Contact me if you would like to get involved or have good ideas for the chapter – we welcome your participation. My email address is bob.tobey@riskcontrolserv.com. I'd love to hear from you!

Bob Tobey, CPCU
President



CONGRATULATIONS CPD QUALIFIERS

We would like to recognize the following individuals who are currently chapter qualifiers under the CPCU Society's CPD Program. These individuals have voluntarily acknowledged the need and importance of **Continuing Professional Development** and have joined with thousands of CPCUs under this program:

Glenn Allen, Charles Allen, Tekeela Barnes, Cliff Carmichael, Robert Eades, Stewart Eassey, Ryan Ezzell, Jennifer Fite, John Halferty, James Hanley, Bryan Heckle, Kelly Hicks, Kenneth Hoke, Paul Hoover, Carl Inman, Cynthia Jones, Michael Karli, Sallie Keel-Mitchell, Greg Lopeman, Kathleen Lucas, Michele Maurer-Williford, Rhonda McFarland, Ronald Medeiros, Lisa Melton, Scott Morrison, Shirley Outlaw, Tammy Pare, Diane Poe, Edwin Powell, Jr., Sallie Rohrbach, Brian Rothert, Deborah Ruggles, Gina Schwitzgebel, Olga Smith, John Sutton, III, and Bryan Tilden

Our chapter was recently recognized at the annual meeting in Los Angeles as a CPD qualifying chapter (20% or more of our members are CPD holders). To qualify, at least 60 points must be accrued every two years and can be earned by a variety of means including:

- Passing an exam or course
- Instructing a course
- Authoring an article
- Attending the Society's annual meeting and seminar
- Serving as a Chapter Officer or on a Chapter committee
- Attending monthly Chapter meetings or scheduled seminars
- Personal Sponsorship

Completion of an application is straightforward with guidance of the qualifying process. An application and

other general information is readily available on the CPCU Society's web site – www.cpcusociety.org. Click on "Learning Center," then click on CPD Program. We'd love to see our numbers increase even further in this area!



2005 Good Works Project

What common theme do Tai Chi, Yoga and the Power of Intention all have in common? All were profiled during the shift we helped man when taking pledges during UNC-TV's Festival 2005 Fund Drive. We felt very fortunate to participate during this event, UNC-TV's 50th anniversary on the air!

On Saturday, March 5th, we sent 11 volunteers to assist with this annual fundraising effort in conjunction with our Chapter's Annual Good Works Project. During our shift, our volunteers raised approximately \$7,000 for UNC-TV.

Everyone who attended had an interesting time touring a sophisticated and modern television studio. We assisted in taking telephone pledges in exchange for a catered lunch, wonderful camaraderie, and the thrill of being under the bright lights and in front of the television camera ... perhaps our memorable "15 minutes of fame." We not only helped support our community but also generated outstanding recognition for our Chapter, the Society, and our commitment as insurance professionals.

Many thanks to all of our volunteers who took part in this worthwhile event including Rhonda McFarland, Mary Gouldin, Bob Tobey, Jennifer Cleaver, Mike Leblanc, Stacy Schrader, Willem Buisman, Amber Wade, Lauren McLamb, Bob Eades and Deane Tolman.

Stay tuned for we are already beginning to develop plans for our next Good Works Project!

CPCU Society Sponsors Annual Leadership Summit Event

The CPCU is holding its annual Leadership Summit and Chapter Leadership Training April 13-16, 2005 in Phoenix Arizona. This annual education event is designed to provide superior, cost-effective, professional leadership training for Society members.

The courses are developed and taught by insurance professionals to help members advance their career track and remain "skills competitive" in the marketplace. Attending this Summit will inspire, motivate and help you become a more effective leader. The courses will enable you to use the newly learned knowledge and skills in practical, day-to-day situations and help you face the ever changing and challenging industry issues.

For more details on this tremendous educational opportunity, check out the CPCU Society website at www.cpcusociety.org.

CPCU SOCIETY WORKSHOPS

Presented by the CPCU Society Co-sponsored by the CPCU Society's Eastern North Carolina Chapter

Two half-day workshops
Wednesday, May 11, 2005

8 a.m. - 12:05 p.m and 12:30 - 4:40 p.m.

- **-2004 Commercial General Liability**
- **-Executive Liability Exposure, Insurance Coverages, and Marketing**

8 a.m. - 12:05 p.m.

2004 Commercial General Liability

Speaker: R. Bryan Tilden CPCU, CLU

WHAT'S IT ABOUT?

Get the lowdown on the new Commercial General Liability program.

You will learn about changes that reflect the new mobile equipment definition; pollution, war, and electronic data exclusions that have been modified or added; new ISO policies, such as the Electronic Data

Liability Coverage Form and Product Withdrawal Coverage Form; and the new additional insured endorsements and modified definition of "insured contract."

WHO'S IT FOR?

This program is designed for all insurance professionals and other professionals who must protect the interests of their "customers,"

including agents, brokers, underwriters, adjusters, reinsurers, risk managers, and attorneys, and who have at least three years of experience.

12:30 - 4:40 p.m.

Executive Liability Exposure, Insurance Coverages, and Marketing

Speaker: Richard G. Clarke, CPCU, CIC, RPLU

WHAT'S IT ABOUT?

This workshop will deal with basic exposures and insurance solutions for directors and officers' liability, employment practices liability, and fiduciary liability coverages. With each exposure area, there will be a discussion of the marketplace, insurer nuances, and ways in which basic insurance coverage may be effectively modified to better address specific exposure aspects.

WHO'S IT FOR?

Designed primarily for insurance agency principals, producers, and account managers, this workshop will also be interesting and informative for insurance buyers, risk managers, and attorneys. If there is a desire to "maximize coverage while minimizing costs," this program is essential!

Location:

Nationwide Insurance
4401 Creedmoor Rd.
Raleigh, N.C. 27612

Fee: CPCU Society members \$69 for one workshop

\$129 for both workshops

Nonmembers \$79 for one workshop

\$149 for both workshops

• Registration Fee

The registration fee includes one CE certificate per

workshop, all handout material, and refreshment breaks.

CONTINUING EDUCATION CREDITS

Each workshop has been filed for four (4) continuing education credits in North Carolina. This program may be rejected and no credit given

CE CERTIFICATES

Registration fee includes one CE certificate per workshop.

Additional certificates are available as follows:

\$4 each CPCU member and CPD

Qualified

\$8 each CPCU member not CPD Qualified

\$12 each Nonmember

Cancellations

Your registration fee less \$20 will be refunded if notification is received at the Society two weeks prior to the program.

- For More Program Information
Contact John Kelly, CPCU, the Society's continuing education coordinating manager, at (610) 251-2773.
- To Register
Call the CPCU Society's Member Resource Center at (800) 932-2728, option 4.

FROM THE MEMBER RESOURCE CENTER. . .

Check Your Member Information Regularly

If you haven't reviewed your member records in the past year, now is a good time to make sure that everything is up to date, especially if you have moved or changed jobs recently. Keeping your records up to date ensures that you will continue to receive Society publications, important e-mails, and other timely information. To review and update your member records, [log in to the CPCU Society web site](#) and click on "Update Your Member Information."

Please note that you cannot change your chapter or company information on the web site. To change your chapter or company information, contact the Society's Member Resource Center at (800) 932-CPCU, option 4, or by e-mail at membercenter@cpcusociety.org.

Computer Changes



As we have recently purchased a new computer for the chapter (with new software), we have experienced some difficulties in our email, print and fax capabilities. We apologize for any inconvenience to our members and students and have been working diligently to correct the outstanding issues. We hope now that all chapter

capabilities are up and running as they should be and we will not experience future difficulties.

The Eastern NC CPCU Chapter Board of Directors



Chapter Meeting Recaps

- January 18, 2005 Luncheon Meeting

Bob Adams, retired Property Claims Manager for the North Carolina Farm Bureau Insurance Company was the guest speaker at the January luncheon meeting held on the 18th at the Crabtree Valley Marriott. Attendance was high with over 40 joining us for this 3rd chapter meeting, as attendees listened to Bob share catastrophe claims planning and special claims handling resulting from numerous recent storms affecting eastern North Carolina.

- February 15, 2005 Luncheon Meeting

Our guest speaker for the February 15th luncheon meeting was Ray Evans, General Manager for the North Carolina Rate Bureau, the North Carolina Reinsurance Facility and the North Carolina Insurance Guaranty Association. Many of you know Ray as a speaker for past meetings and we're delighted to claim him as a member of our own Eastern NC CPCU Chapter. Ray provided an overview of the current issues facing the above referenced organizations as well as the major objectives for each of the entities, including residential property, private passenger auto and workers compensation rate activities, reinsurance facility cession activity and surcharge changes and 2004 claims payments from the

IGA. Over 45 attendees participated in this 4th monthly meeting – what a great turnout!

- March 15, 2005 Breakfast Meeting

March is traditionally recognized as Ethics Awareness Month by the CPCU Society. Shifting from a luncheon meeting to a breakfast meeting, Sharon Koches led the group in a street level discussion of Ethics Issues facing the insurance industry. Sharon is the Marketing Director for the Southern Region for the American Institute for CPCU and the Insurance Institute of America. Many of you know Sharon from her participation in the CPCU new designee conferment ceremony for the chapter back in 2004 at our annual I-Day event. Sharon provided an interesting presentation of ethics issues facing the industry and attendees participating in an interactive case study discussion during the session. The 5th chapter meeting was well attended with 24 participating in this breakfast session.

Thanks to our guest speakers – Bob, Ray and Sharon- for participating in our meetings and sharing their special information, insights and experiences with those in attendance!

The chapter meetings are a great way to network, meet and make new friends and learn valuable information impacting our industry and the local business community. Make plans to attend a future chapter meeting. Stay tuned for future meeting announcements. You'll be glad you did!!

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Treasurer – Greg Kilburn

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Director – Robert Musgrove

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Director – Scott Morrison

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April 1, 2005

Chapter Officers

President – Bob Tobey

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