



Richmond CPCU Newsletter

www.richmondpcu.org

Summer 2007

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President's Message

Dear Members & Friends,

I am very honored to serve as your Chapter President, for the 2007/2008 year. These are truly exciting times. With such a large incoming group of designees, what a tremendous wealth of knowledge we shall have for our Chapter. Already, we have several new designees that have volunteered to serve on our Board, and we are committed to have programs, opportunities and activities that will appeal to all.

We have been extremely fortunate to have such great leadership. Jeff Wrobel, our past President, provided us with a year of outstanding programs. Mary Beth Scherer, our Executive Director, continues to provide us with a quality education program that is a remarkable source of pride. It is this great teamwork that makes us stand out, and as a result, we earned the highest honor shared among all the Chapters, the **Gold CPCU Circle of Excellence Award**. What a great accomplishment for us all, and I would like to thank Jeff and the entire Board of Directors for working so hard to achieve our success.

Our exciting year will begin on Tuesday, September 4th at The Place, as we welcome our speaker, Tony Markel, to our first lunch meeting. We are thrilled to have such a dynamic individual to kick off the year for us. For those traveling the following week, to the annual conferment in Honolulu, Hawaii, we wish you Aloha, safe travels and fun times!

The following month, I-Day will be held on October 18, and if you are a Season Pass holder, your admission is included in the pass. As the year unfolds, we will keep you informed of our meetings and activities. Be sure to visit our website at www.richmondpcu.org for the latest information on the Greater Richmond CPCU Chapter.

Have a great summer, and I look forward to seeing you this year.

--Polly Miller, CPCU, President

Virginia I-Day is October 18, 2007

Virginia I-Day is held annually and exists to foster interaction within the insurance industry and provides a forum for the exchange of ideas and encourages insurance education for individuals either in the industry or preparing for a career in insurance. Proceeds from the Virginia I-Day conference helps fund an annual scholarship awarded to a Virginia student studying insurance and business.

This year's conference will be held on Thursday, October 18th at the Richmond Marriott Downtown. The featured speakers this year include Anthony F. Markel, President & CCC -

Markel Corporation, Thomas Van Berkel, Chairman, President & CEO of The Main Street America Group and Dr. Steven Weisbart, Vice President/ Economist with the Insurance Information Institute. Please make your plans to attend this great event and refer to our website www.virginiaiday.org for further information and registration.

****Greater Richmond Chapter New Designees****

Please welcome our newest CPCUs to the Chapter!! Some achieved their designation last fall, some this spring and summer-welcome to the Greater Richmond Chapter and the Society of CPCU! WELL DONE! Hawaii, here we come!!

- 1) **James Nicholas Abraham, CPCU**-Markel Re
- 2) **Carole A. Barnes, CPCU**-Markel Global Marine & Energy
- 3) **Stuart E. Bicknell, CPCU**-Selective Insurance Group Inc
- 4) **Stephen B. Bowser, CPCU**-MetLife Auto and Home
- 5) **Renae L. Burell, CPCU**-Markel Insurance Company
- 6) **Mary Carbonneau, CPCU**-State Farm Insurance Cos
- 7) **Brenda E. Clapper, CPCU**-Markel Insurance Company
- 8) **Edward E. Connell, CPCU**-AIPSO
- 9) **Nora C. Crouch, CPCU**-Markel Corporation
- 10) **Stacy Shaw Dorman, CPCU**-Markel Insurance Company
- 11) **Frank A. Feldman, CPCU**-Johns Eastern Company
- 12) **Denise Garrett, CPCU**-SAFECO Insurance Companies
- 13) **Cynthia L. Gregory, CPCU**-Markel Insurance Company
- 14) **Kelly A. Hadiaris, CPCU**-James River Corp Of VA
- 15) **Tina Marie Hamilton, CPCU**-Virginia Farm Bureau Group
- 16) **Bonita T. Harlow, CPCU**-Markel Insurance Company
- 17) **Anne Hill, CPCU**-Minnesota Lawyers Mutual
- 18) **Amber T. Johnson, CPCU**-PMA Insurance Group
- 19) **Gina Johnson, CPCU**- GEICO Fredericksburg, VA
- 20) **Maureen H. Jones, CPCU**-Markel Insurance Company
- 21) **John M. Lantz, CPCU**-Nationwide Insurance, Lynchburg, VA
- 22) **Anita Laczi Leuschen, CPCU**-Essex Insurance Company
- 23) **Melinda L. Lloyd, CPCU**-Markel Insurance Company
- 24) **Fred M. Loving, Jr., CPCU**-Markel Insurance Company
- 25) **Janay Majors, CPCU**-GEICO Fredericksburg, VA
- 26) **Dave Mathes, CPCU**-W R Berkley Mid-Atlantic Group
- 27) **Anna Maxwell, CPCU**-Markel Re
- 28) **Maxwell L. Mc Connell, CPCU**-W R Berkley Mid-Atlantic Group
- 29) **Donna P. McGhee, CPCU**, Specialized Insurance Services
- 30) **Kirby Vincent Montgomery, CPCU**-Markel Insurance Company
- 31) **Jason R. Ocheltree, CPCU**-The Colony Group
- 32) **Sharon Boxley Pieterse, CPCU**-National Grange Mutual
- 33) **Ryan S. Rafferty, CPCU**-James River Insurance Company
- 34) **Bill Riester, CPCU**-State Farm Insurance Cos
- 35) **Austin W. Roberts, CPCU**-James River Insurance Company
- 36) **Michelle D. Rutherford, CPCU**-GEICO Fredericksburg, VA
- 37) **Scott L. Schiltz, CPCU**-Sentry Insurance Group
- 38) **Nona Sodhi, CPCU**-James River Insurance Company
- 39) **Suzanne Sojda, CPCU**-Markel Insurance Company
- 40) **Philip E. Stephens, CPCU**-Markel Corporation
- 41) **Scott A. Stevens, CPCU**-Markel Insurance Company
- 42) **John Richard Strickler, CPCU**- Essex Insurance Company
- 43) **Kim E. Teeple, CPCU**- SAFECO Insurance Companies, Fredericksburg, VA
- 44) **John M. Waggoner, CPCU**-PMA Insurance Group
- 45) **Robert Glenn Whitt III, CPCU**-Markel Insurance Company
- 46) **David Kevin Wilson, CPCU**-VA Property Insurance Assoc.
- 47) **Marianna H. Wilson, CPCU**-Key Risk Management Services Inc
- 48) **Stuart P. Winston, CPCU**-James River Insurance Company
- 49) **Daniel F. Wright, CPCU**-Mutual Assurance Society of VA
- 50) **Cindi Zelenick, CPCU**-Virginia Farm Bureau Group
- 51) **Beth A. Zielazny, CPCU**-James River Insurance Company

Education Update-Summer/Fall 2007

Congratulations go out to Tim Cook, CPCU who was recognized by the American Institute for CPCU for his excellence in education. Tim qualified for the Level 2 instructor award based on the excellent pass results of students enrolled in his classes. Tim has taught in the Associate in Claims and the Associate in Risk

Management programs for the chapter since the fall of 1999. The local chapter is truly proud and appreciative of the dedication that Tim has to our program and to his students.

In May, the American Institute held a conference in Malvern for course sponsors across the country. Our chapter sent Mary Beth Scherer, M. Ed., our executive director. We were quite pleased to hear that our education programs ranks among the other “major” programs in the country. We were in the company of programs in Philadelphia, Chicago, Boston, and Baltimore. The Institutes is feeling the need to adapt programs and program format to suit the ever-demanding schedules of their students. Our chapter is responding to this need by offering “lunch break” courses that don’t add an extra time commitment to students outside of the workday. We will continue to try to meet the needs of the market.

We have been approached by several students who have interest in beginning the Associate in Management (AIM) designation. It is possible that we might be able to put together a class for the spring, or we could link several students together for an informal study group. If you have interest in a possible class for AIM, please call Mary Beth Scherer at 784-7278 or write to mbys@richmondpcpcu.org.

Many of our fall classes have begun, and it looks like another successful semester. Classes must begin early in the summer in order to prepare for the October 15-December 15th exam window. Our students seem to prefer this format to having to straddle the holidays for their exams. CPCU 510, 520, 530, and 560 are currently in session for a total of 48 students. Our IIA classes consist of INS 21 and 23, AIC 33 and 35, ARM 54, ASLI 163 and AU 65. These classes have start dates scattered across July and August. If you would like to join a class, there is still time.

For the fall of 2007, CPCU 520 and INS 23 are being offered as “lunch break” courses. The classes begin at 11:00 a.m. and end at 1:00 or 1:30. Students “give an hour” and employers “give an hour” to make these sessions possible. These classes have been so popular, that we have had to close both. Local employers have been gracious in allowing their employees to take time away from work to participate in these classes, but we feel that the payoff for everyone is huge.

Welcome to all of our seasoned instructors! Sue Zoboli, Craig Mathre, Rick Scherer, Jeff Wrobel, Joe Feichtel, Jennifer Blandford, Tim Cook, and Bruce Kay are veteran instructors who are teaching this semester. Nick Abraham and Sean Cullinan are instructors who began in our apprentice program and have returned to teach classes of their own. Geoff Cahill is trying his hand as an instructor. Geoff will be team-teaching in the ASLI program along with Bruce Kay. We are delighted to have Susan Lascolette return to us after a sabbatical. Susan is teaching CPCU 530 for us this semester. These dedicated people are what make our education program great. When you see one of them at a business lunch or at a CPCU meeting, please take the time to stop and express your thanks. They raise the bar of the insurance industry for all of us.

If there is a course, a time frame, a location, or a format that you would like to see us consider for our classes, please contact Mary Beth at 804-784-7278 or mbys@richmondpcpcu.org. Interest on behalf of a few students is often what generates the start of a new class. We are considering a Southside location for a course in the spring. If you have interest or suggestions for us, let us know.

---Mary Beth Scherer, M. Ed., Executive Director

Richmond CPCU Receives Circle of Excellence Gold Award!

Your Richmond Chapter of CPCU was recently awarded the Circle of Excellence Gold Level Award for the second consecutive year. This award represents the highest level awarded by the CPCU Society. The Circle of Excellence Program was developed to support the CPCU Society's three areas of strategic emphasis: visibility, member success, and stewardship. Your executive leadership team of Jeff Wrobel, Polly Miller, David Murray, and Debbi Harrington, along with plenty of assistance from other board members, led the chapter in a number of activities throughout the past year that are recognized by this honor. Several examples include:

- Our chapter encourages its leadership to take advantage of speaking opportunities. Jeff Wrobel made a presentation to the insurance fraternity at VCU. Mary Beth Scherer made a presentation to the Female Adjusters of Richmond. Craig Mathre has put on a number of educational seminars throughout the country for the National Alliance, the NAIW, AAMGA, and CPCU I-Days.
- Our education program, led this past year by Mary Beth Scherer and VP Polly Miller, continues to be one of the strongest in the country and receives national recognition for its high level of participation, strong pass ratios, etc. In addition, several of our instructors have received Outstanding Course Leader recognition.
- We sponsored two NLI classes in March 2007: Strategic Management and Ethics. This past December we offered a CE program covering Hidden Coverages/Surprises in Court and Identity Theft. We also sponsored the 2nd annual RISC Conference at VCU with presentations on state vs. federal regulation, long-term care, and flood insurance.

Mark Your Calendars for the Upcoming Insurance Journal Web cast on Excess and Umbrella Liability Insurance – September 26th!!

Craig Mathre will be presenting another web cast sponsored by the Insurance Journal and Markel Corporation. The topic will be Unraveling the Mysteries Surrounding Excess and Umbrella Insurance/ How to Sell This Critically Important Coverage. It is scheduled for 10:00 a.m. EDT on September 26. To participate in the web cast, you must pre-register at the Insurance Journal website: www.insurancejournal.com. A preview of this upcoming web cast is also available at the website.
