

CHAPTERGRAM



Chapter Update

Jay Baas, CPCU

Chapter President



EASTERN NC CHAPTER

OK, so the weather in Eastern North Carolina has finally caught up with the calendar, the kids are out for the summer, and all of us insurance geeks are watching the tropics, hoping for a quiet season. Yes, we are almost half-way through 2015 and there is a lot going on with your local chapter and the Society at a national level.

We started the year with Jane Wahl, CPCU, our current President and Chair of the CPCU Society sharing a lunch with us and letting us know

some of the exciting things that are coming from Malvern. Jane challenged each of us to recognize the opportunities that lie before us as a CPCU.

In February, Jim Semple joined us from NC State and gave us insight into the challenges of managing Risk from a Public University perspective. It's always good to have a fellow CPCU and Chapter member as our speaker.

March 10 was our annual I-Day with the theme this year of

“Meeting Tomorrow’s Challenges.” Susan Burkhart filled us in on the ever-changing challenges of insuring Data-Breaches, Dean LaPierre with Berkshire Hathaway telling us how they look at the new market of North Carolina, Sharon Koches of IIANC challenging us to invest in InVest, and Brenda Wells of ECU preparing us for the insurance challenges with the current trend towards legalization of marijuana. And most importantly we had the opportunity to recognize our 16

Continued page 2

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Eastern North Carolina CPCU Society Chapter, Inc.

Chapter Update Continued



EASTERN NC CHAPTER

new CPCU designees and welcome them to the Eastern NC CPCU Society Chapter.

In March, we continued our annual Spring Good Works Event, helping out with the UNC-TV Telethon, an always rewarding event for those who had the chance to work it.

In April, Dennis Carroll and I represented our Chapter and the annual CPCU Leadership Summit in Ft. Lauderdale. It was a pleasure to learn more about some of the upcoming challenges and opportunities faced by the Society and our industry, as well as to learn from other Chapter leaders around

the country. Stay tuned for more information on such issues as the MyPath program and the Continuing Education Initiatives to be shared this fall at the Annual Meeting in Indianapolis. And it was an honor to stand up on behalf of our chapter for our recognition as a Gold Circle of Excellence Winner, our 8th consecutive year!

So what is on the horizon for the Eastern NC Chapter? This summer, while we take a break from our monthly luncheons, we will host at least a couple of social events, including a picnic and another Chapter Beach Social at Kure Beach.

In the fall we'll jump back in with interesting speakers including our Insurance Commissioner Wayne Goodwin in September to bring us up to date with what is going in in the Old North State, and Tom Davis of Poyner & Spruill, LLC in October to talk about how to make sure you and your family are prepared for your future... and without the use of an attorney!

We hope you enjoy the rest of the newsletter and look forward to seeing you at some of our upcoming events!

Annual Meetings



2015 CPCU Society Annual Meeting
October 3-6 | Indianapolis, Indiana

[REGISTER](#)

Future Dates

2016 | Honolulu, Hawaii



2017 | Orlando, FL





Good Works

Deane Tolman
Good Works Chair

Food Bank

Sadly, hunger remains a serious problem in Central and Eastern North Carolina. Nearly 34 percent of the people served by the Food Bank’s network are children, and another 11 percent are elderly. Thirty-eight percent of the families served are the “working poor” – people who work hard and still have to choose between eating and other basic necessities, such as medicine and housing.

On Saturday, December 13th our charter sent 9 volunteers to the Food Bank of Central and Eastern North Carolina. Established in 1980, the Food Bank is a nonprofit organization that has provided food for people at risk of hunger in 34 counties for 30 years. The Food Bank serves a network of more than 800 partner agencies such as soup kitchens, food pantries, shelters, and programs for children and adults through distribution centers in Durham, Greenville, New Bern, Raleigh, the Sandhills (Southern Pines) and Wilmington.

Our tour of duty, this particular morning, involved the sorting and bagging of bulk white and sweet potatoes into manageable -size bags to be distributed to needy families. Our team was responsible for bringing a little more joy and happiness to families during this festive time of the year.



I-Day Food Drive

During I-Day this year, our members continued to step up and support this on-going need. Through generous donations, we

collected enough food and money, during this event to provide 1,164 meals for needy North Carolina families!

UNC-TV

UNC-TV's Festival 2015 (at their RTP studio) was part of our chapter's most recent involvement for our Spring 2015 Good Works. Our volunteers answered phones and took pledge information from UNC-TV's many supporters (while raising thousands of dollars). In the process we learning that our participation was a great way to meet new people, witness a live television production, get a behind-the-scene tour of the studio, support public television, while bringing publicity for our chapter! Our participation is an essential part of UNC-TV's continued success.



The Insurance Industry Needs Millennials

Shortly after entering the industry, Thomas received his designation, became active in the chapter, joined the board and took on the position of Education Chair. We asked Thomas for a Millennial's perspective on what attracted him.



Why I Chose CPCU

Thomas Rhodes, CPCU, AAI, AIC, ARM, AU, CBIA

Education Chair

After graduating from college in the spring of 2010, I went to work for Liberty Mutual in Charlotte as a commercial lines claims adjuster. With no experience in the insurance industry, there was definitely a large learning curve that I had to quickly bridge. Though I really enjoyed adjusting claims, my aspiration and goal was to eventually jump into the agency side of the business as a

and the AIC was instrumental in teaching me the fundamentals of the job. More importantly, the AIC opened my eyes to the CPCU program and its magnitude of benefits.

After completing the AIC, I immediately dove head first into the CPCU program by starting on the core foundation courses. These first

commercial insurance that I now continue to build on every day.

After four amazing years with Liberty Mutual, I was able to successfully integrate into a producer role with an agency. The CPCU program was an integral part in my ability to market myself and my abilities as a younger insurance professional to my future employer, and was able to create almost instant credibility with new coworkers. It has also given me the knowledge and tools to efficiently perform my role as a producer, and more importantly, has taught me that I can never stop learning throughout my career in order to stay on top of our industry. I would highly recommend the CPCU designation program to any insurance professional, as it has exponentially helped my personal career and understanding of insurance. The program truly is an asset and the benefits of being a member of the CPCU Society are limitless!!

“The CPCU program was an integral part in my ability to market myself and my abilities as a younger insurance professional to my future employer, and was able to create almost instant credibility with new coworkers.”

producer. All of this being said, I turned to the Institutes to help supplement my “on the job” training with Liberty by taking advantage of their massive library of course curriculum and professional designations.

I started with the Associate in Claims (AIC). I really wanted to be the best possible claims adjuster I could considering my experience,

4 courses were able to drastically increase my understanding of the insurance industry, and gave me an excellent, well-rounded knowledge of all aspects of our ever-changing business. I then decided to do my concentration courses on commercial insurance, as I knew that is the area of production I wanted to focus on one day. These courses were essential in developing the expert understanding of

GET INVOLVED.



EASTERN NC CHAPTER



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- Charles Stewart Allen, Jr.
- David J. Braswell
- Stephen P. Broderick
- Meghan Brown
- Steve Butler
- Valerie Butler
- Dennis Carroll
- Amy M. Craig
- Geoffrey Crater
- Paul V Francis
- Shannon Garcia
- Kimberly R. Head
- Paul Hoover, IV
- Keri L. Johnson
- Kenan Johnston
- Michael Kelly
- Sharon Ann Koches
- Keith Lee
- Jennifer Moore
- Scott A. Morrison
- Thomas J. Murray
- James Joseph Pratt
- Angela Shaw
- John Thomas Barnes Smith
- Deane Franklin Tolman, Jr
- Lisa J Tyree
- Stephen Westfield

Congratulations to our members who have attained their CPD qualification!

Should your name be here?

Don't forget to log onto the Society's website to submit your information.

September 9th Lunch Meeting

Wayne Goodwin

NC Insurance Commissioner
"Update from the Commissioner's Office"
4401 Creedmoor Rd. Raleigh, NC 27612

[Register](#)

October 14th Lunch Meeting

Tom Davis, Jr.

Poyner Spruill | Partner

"Practical Ways to Protect Your Family and Assets, All Without the Use of an Attorney,"

5301 Glenwood Ave. Raleigh, NC 27612

[Register](#)

November 5th Cyber Liability Course



9:00am to Noon
3 Hours of CE
IIANC | 101 Weston Oaks Ct. Cary, NC
Cost: \$25 (Includes CE Filing)

[Register](#)

November 12th Lunch Meeting | Details TBA

PULLEN PARK

Established 1887

 **CPCU**
SOCIETY
EASTERN NC CHAPTER

FAMILY FRIENDLY CHAPTER SOCIAL



Join us for lunch, networking & fun!

When: Saturday, August 8th
11:00am to 1:00pm

Where: Pullen Park | Shelter 2
408 Ashe Ave. Raleigh, NC

Cost: \$3 Per Person Early Registration
\$5 After July 20th
Ages 12 & Under Free!

[Register Online](#)



One Free Ride Ticket Per Registration!

Proceeds To Be Donated To The Food Bank Of Central & Eastern NC



CHAPTER MEETINGS



SAS
Mari-Jo Hill, CPCU, ARM



Swearing In New Officers



NCSU
Jim Semple, CPCU



CPCU Society President
Jane M. Wahl, CPCU



NC Insurance Commissioner
Wayne Goodwin



Smith Anderson
Rosemary Kenyon

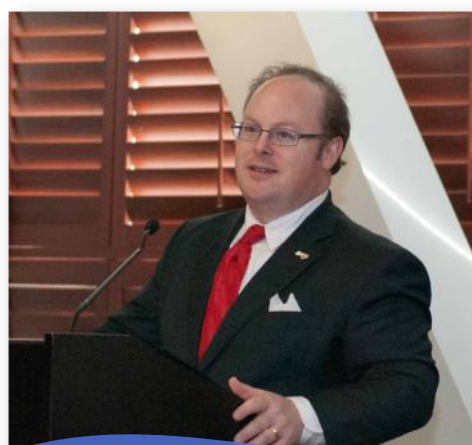


EASTERN NC CHAPTER





I-Day Chair
Dennis Carroll, CPCU



NC Insurance Commissioner
Wayne Goodwin



Berkshire Hathaway
Dean LaPierre, P.E., CRIS



NEW DESIGNEES

I-Day 2015



EASTERN NC CHAPTER



Cranfill Sumner & Hartzog, LLP
Susan Burkhart



PNC Arena
Davin Olsen



The Institutes
Charles Runge



I-Day 2015



Registration

IIANC
Sharon Koches, CPCU, RPLU, AAI, AU, ITP



ECU
Brenda Wells, Ph.D., CPCU, AAI

2015 SPONSORS

DIAMOND LEVEL



PLATINUM LEVEL



GOLD LEVEL



SILVER LEVEL

Durfey-Hoover-Bowden Insurance Agency
Summers, Thompson & Lowry, Inc.
The Willey Agency

*Congratulations to our New Designees!**

Geoffrey Crater, CPCU
Paul Francis V, CPCU
Shannon Garcia, CPCU
Kimberly Head, CPCU
Jennifer Moore, CPCU
Thomas Murray, CPCU
Angela Shaw, CPCU
Lisa Tyree, CPCU

We hope to see you in Indianapolis!

OTHER PROGRAM COMPLETERS*

Accredited Advisor in Insurance (AAI)

Stephanie Levins

Associate in Claims (AIC)

Tessa King
Megan Lamm

Associate in Claims Management (AIC-M)

Megan Lamm

Associate in Risk Management (ARM)

Stephanie Levins
Vivek Shekhar

Associate in Risk Management-ERM (ARM-E)

Craig Jackson

**Lists Based On Information Received To Date*

Spotlight on New Designees!

A Few Of Our New Designees Shared What The CPCU Designation Means To Them



Shannon Garcia, CPCU

“Earning my designation provided me with a boost of confidence in my day to day work responsibilities and taking on new challenges. The sense of accomplishment associated in completing the designation is beyond words.”



Angela Shaw, CPCU

“Earning the CPCU designation has not only broadened my knowledge in the different areas of study, it has also given me more confidence training my team and educating my customers. I am honored to be a CPCU designee and I proudly display my CPCU diploma.”



Geoffrey Crater, CPCU

“The CPCU means a great deal to me not only for years of hard work, but a personal goal that was set when I got into the industry, that has finally achieved. To be successful in the insurance industry, you need to continue to educate yourself especially as the market and landscape continues to change around us. Always be looking for ways to increase your knowledge base in this great industry of ours, and the CPCU is the premier way of doing so.”



Kim Head, CPCU

“After being in the insurance industry for 22 years, I chose to pursue the CPCU designation to help further my career. Earning the CPCU designation was well worth the long hours of studying and preparing for the exams. My knowledge of the insurance industry in general increased immensely, and this knowledge will assist me in being an asset to my employer.”



Tom Murray, CPCU

“I started working in the property casualty insurance industry over twenty-two years ago. Earning the CPCU designation is a way for me to demonstrate my broad understanding of the industry and that I am an insurance professional dedicated to my continued education.”



Paul Francis, CPCU

“An important educational milestone in my career recognizing my insurance and risk management professional knowledge. I feel proud attaining this valuable and highly recognized credential and feel certain it will benefit my business career. The whole process of attaining the designation was very positive and The Institutes was supportive and very helpful along my educational journey.”



Lisa Tyree, CPCU

“I have worked in the insurance industry with the same company for over 20 years, beginning in personal lines insurance and for the past 15 years working in commercial lines. I decided to pursue my CPCU with a commercial lines concentration for career development and personal growth. I have always enjoyed learning and working in the insurance industry, having earned other designations along the way, but finally earning my CPCU designation has given me a tremendous sense of pride and accomplishment.”

The Butlers, CPCU | Husband and Wife Earn CPCU Together



We attained our CPCU for personal and professional development and to advance our career opportunities

As a team, we manage daily claim operations for RJMW Claim Services (RJMW, Inc); an independent, multi-line, adjusting firm headquartered in Charlotte, NC. Our duties include recruiting, hiring, training, and managing general and specialized claim adjusters. We are responsible for maintaining RJMW's current partnerships and developing new ones while complying with client service instructions and implementing best practices guidelines in our daily claim handling operations. Additional responsibilities include process leadership, performance development, quality assurance, and to ensure

outstanding customer service. As insurance professionals, we have served as inside and outside claim representatives for a number of national insurance carriers following catastrophic weather events like hurricanes, tornadoes, ice storms, hail storms, wildfires, and floods. We consistently modeled ethical behavior and executed job responsibilities in accordance with corporate core values and ethics policies.



Valerie Butler, CPCU

Eastern North Carolina CPCU Society Chapter, Inc. Officers & Directors



Dave Braswell, CPCU, CIC, CRM
Immediate Past President



Jay Baas, CPCU, AIC
President



Dennis Carroll, CPCU, ARM
President Elect



James Pratt, CPCU
Vice President



Sarah Asher, CPCU, AU
Treasurer



Deane Tolmand, CPCU, ARM
Good Works



Bill Stewart, CPCU, ARM
Membership



Thomas Rhodes, CPCU, AAI
AIC, ARM, AU
Education



Paul Hoover IV, CPCU, CIC
Webmaster / Visibility



Robert Eades, CPCU, ACLS
Director



Keith Lee, CPCU, AIC
Programs & Meetings



Gina Schwitzgebel, CPCU, CIC
ARM, AIC, AMIM
Director



Amy Craig, CPCU, AAI, MLIS,
CISR, CPIW, CAE
Director



Charles Runge, CPCU, CIC
Sales Executive
The Institutes



Suzanne Schneider, AINS
Admin



Eddie Herrera, CPCU, MBA
Governor