

2007-2008

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Greater Milwaukee Chaptergram
Volume XVII **September 2007**

President's Message

I write this column while preparing to attend the CPCU Society Annual Meeting and Seminars in Honolulu, Hawaii - "Destination of Choice." The CPCU designation will be conferred on over 3,900 New Designees - the second largest class in history! The Greater Milwaukee Chapter is proud to have 54 of these New Designees in our local chapter. The Chapter extends its heartiest congratulations to the class of 2007!

A big THANK YOU to Tom Delahunt, CPCU, Schueller-Harrington & Assoc., for leading the chapter this past year. Under Tom's leadership the Greater Milwaukee Chapter earned the Gold level in the CPCU Society's Circle of Excellence program.

In July your officers and board met to plan the Chapter's activities for 2007 - 2008. Use the enclosed activity calendar to save the dates of all the CPCU Chapter activities. We are looking forward to another great year.

Your officers and board set the following goals for 2007 - 2008:

- Provide online registration and credit card payment for Chapter events.
- Recruit an additional web master to keep the Chapter website current.
- More involvement from candidates/members new to the industry.
- Involve more agencies and companies in Chapter leadership and activities.
- Improve education programs by partnering with industry companies & trade associations.

We cannot achieve these goals without your help. Consider volunteering an hour or two a month to help the chapter achieve the above goals. If you have experience in any of the above areas and can help, please contact me at Ewert.Mark@PartnersMutual.com or 262.798.5060 x231. Inside this issue is an appeal for members to volunteer an hour or two to greet and register All Industry Day attendees November 8, 2007.

Speaking of All Industry Day, mark your calendars for Thursday, November 8, 2007. We return to the Italian Community Center for this important event. All Industry Day will begin with an educational seminar in the morning (4 CE credits) followed by a luncheon. Our guest speaker is Jeff Rieder, President,

The Ward Group. This will be a great opportunity to network with your fellow CPCUs and meet our new designees.

Thank you for allowing me to serve as your chapter president for 2007 – 2008 chapter year. I am proud to be a part of this great CPCU community! If you are new to the chapter, or if it has been some time since you have attended a chapter event, I encourage you to get involved and start enjoying the benefits of your CPCU Society membership!

Mark H Ewert, CPCU, CIC
2007 - 2008 President
CPCU Society – Greater Milwaukee Chapter

Treasurer's Year-End Report

With the end of our fiscal year at 6/30/07, I have closed our books and prepared our final financial statements for the year and am preparing to give them to our new treasurer, Diana Mullranin. Before I do that, I would like to report one last time on our financial position.

The previous treasurer entrusted me with a very strong financial position of \$42,808 in surplus. I am glad to report that I in turn am passing on a healthy surplus level of \$40,785 to my successor. Our financial goal as an organization is to maintain a reasonable level of surplus given our size and scope and our slight loss of \$2,023 for the year is consistent with that goal.

David R. Young, CPCU
2006-2007 Treasurer
2007-2008 President-Elect
CPCU Society – Greater Milwaukee Chapter

A Message from our Governor

As a Society Governor for the North Central region, I thought I would tell you about a couple of exciting things that are happening within the CPCU Society. The first one is about the change from “Sections” to “Interest Groups.” It was felt that the term “sections” carries connotations of silos, while “interests” applies whether one works in a discipline, or just has an interest in learning more. Along with this name change, starting in 2009, **all CPCU Society members will receive a complimentary membership in one of the Society's 14 interest groups.** For those Society members that wish to belong to more than one interest group, the Society will continue charging \$30.00 for each individual interest group membership.

As a result of the Board meeting in April, an Emerging Leader Task Force was formed. Their charge was to recommend programs & services that appeal to and engage CPCU Society members and CPCU New Designees that are considered “younger (under 35).” The board accepted their recommendations in Hawaii, so look forward to more on this in the future.

Lastly, I wish to congratulate the 2007 Greater Milwaukee Chapter New Designees. I hoped that you enjoyed your time in Hawaii and was able to include a few of the meetings that were offered as well as having fun. The number of New Designees for the class of 2007 was 3,649 and over 7,000 people were

in attendance for the annual meeting in Hawaii. I hope that you will continue your membership and become active at either the Chapter or Society level or both. Here are six ways you can become involved with the Society and the benefits that each one offers:

1. Become a Dues-Paying Member
2. Attend Local Chapter Meetings and Events
3. Join a Chapter Committee
4. Become a Chapter Leader
5. Work on a Society Task Force or Committee
6. Become a Society Leader

I also hope that you will also considering attending another Annual Meeting in the future. Sometimes as a New Designee it is hard to take advantage of all that the meeting offers.

I would like all members to also consider these six ways to become involved with the chapter or Society. I think that if you ask any one who is involved at any level, that the experience is worthwhile. Besides the local level, there are lots of opportunities at the Society level. When I became involved at the Society level, I could not believe all that is done by the Society for its members. By becoming involved at this level, it will give you a new appreciation of the Society and all that it does. If anyone would ever like to talk about the various volunteer opportunities, please feel free to contact me at 262-884-6144 or marlysm@crbins.com

Marlys Maciona, CPCU
Governor – North Central Region
CPCU Society

All-Industry Day – A Preview

The information on the upcoming 41st annual Greater Milwaukee Chapter All-Industry Day Luncheon is as follows:

Date: Thursday, November 8, 2007
Time: 11:30 Social Time
12:00 Luncheon, with program following
Place: Italian Conference Center
631 E. Chicago St.
Milwaukee, WI

The Greater Milwaukee Chapter will welcome 54 new designees at the All-Industry Day Luncheon. We are proud to confer designations to one of the largest classes in the history of the Greater Milwaukee Chapter.

We are fortunate to have Jim Marks, CPCU, Executive Vice President of the CPCU Society, as the conferring officer. He is one of the top executives of the Society, and he is looking forward to visiting the Greater Milwaukee Chapter for the first time.

This year's keynote speaker is Jeff Rieder, who is the president of the Ward Group, which is one of the top insurance benchmarking companies in the country. He has an excellent background as an industry expert, and he comes as a highly recommended speaker.

There will also be two educational seminars – one preceding the luncheon and one following the luncheon. The instructor for both seminars will be R. Bryan Tilden, CPCU, who is a nationally recognized speaker. He has received glowing comments from Chapter members for his prior seminars. The two seminars will be:

8:15 am to 11:45 am "Hidden Coverages" – 4 CE credits approved in WI and IL

1:45 pm to 4:30 pm "Closing the Gaps in Property Insurance" - 3 CE credits approved for WI and IL

The last few pages of this newsletter contain more information on these seminars.

Please mark your calendar to save the date for the All Industry Day Luncheon, and the educational seminars, on Thursday, November 8th. A flyer will be sent out at a later date to sign up for the luncheon and the seminars.

Volunteers Needed at the All-Industry Day Luncheon

We're pleased to announce that the Greater Milwaukee Chapter has a large number of new designees that will attend our local Conferment Ceremony in conjunction with our annual All Industry Luncheon! Because of the number of new designees, we are expecting a large turnout for the luncheon.

We need your help to register individuals as they arrive. Please contact Tom Delahunt, tdelahunt@schuellerharrington.com or 414.765.2300, if you can help with the registration table at the November 8, 2007 All Industry Luncheon.

Milwaukee Chapter Wins Gold!

The Greater Milwaukee Chapter earned the Society's Gold "Circle of Excellence" award for outstanding achievement during the 2006 - 2007 chapter year. "Circle of Excellence" recognizes chapters that complete activities that support the Society's Strategic Plan, further chapter goals, and help to ensure members' success.

The Gold "Circle of Excellence" medallion was presented to Chapter President, Mark Ewert, in August. It will be presented to the membership during the All-Industry Day Luncheon on November 8, 2007. Congratulations to Immediate Past President Tom Delahunt, the officers, board members, and members at large who helped make this achievement possible.

CPCU Society Service Opportunities

The CPCU Society mission statement defines the future of the CPCU Society. Our success in carrying out that mission depends upon the quality and effectiveness of our volunteer leaders. Your willingness, as a volunteer, to offer your time and talents is vital to our continued success.

There are many ways to apply your skills at the CPCU Society level. Visit the CPCU Society web site at www.cpcusociety.org to view a brief description of duties, time requirements, competencies, and experience desired for each Society level volunteer position. When you complete your time in the chapter positions, seriously consider a nomination to be a Society governor, or another form of Society Service by completing the Application for Society Service, which can be found at this [link](#).

Congratulations to our New Designees!

The following fifty-four individuals were eligible to receive their CPCU designation at this year's annual meeting! Congratulations to them all!

Daniel Bell	Liberty Mutual Insurance Group
Pamela J. Braam	Hawkeye-Security Insurance Company
Larry L. Brant	Wausau Insurance Companies
Kim M. Bunk	Wausau Insurance Companies
Matthew Burrows	Liberty Mutual Insurance Group
Kelly C. Cavanaugh	ACUITY
Joel K. Christ	West Bend Mutual Insurance Company
Judy A. Close	West Bend Mutual Insurance Company
Eric Crubaugh	Kemper Insurance Companies
David R. DeLongJr.	West Bend Mutual Insurance Company
Ryan L. Ellis	Universal Underwriters Group
Mitch Florea	State Farm Insurance Companies
Tarra Gallagher	Liberty Mutual Insurance Group
Brian A. Gilman	Liberty Mutual Insurance Group
Rebecca S. Goodwin	West Bend Mutual Insurance Company
Craig A. Grenfell	ACUITY
Lisa Hansen	Wausau Insurance Companies
Richard Hawk	West Bend Mutual Insurance Company
Kim B. Hoitink	West Bend Mutual Insurance Company
Trevor Jacobs	Kemper Insurance Companies
Michael A. Kjelland	Employers Insurance of Wausau
Bonnie M. Klemme	West Bend Mutual Insurance Company
Rita Knaack	Liberty Mutual Insurance Group
Duane T. Krainz	Wausau Insurance Companies
Laurie M. La Duke	West Bend Mutual Insurance Company
Natasha M. Lambrecht	West Bend Mutual Insurance Company
Todd T. Leichtle	West Bend Mutual Insurance Company
Randolph J. Lepak	Erie Insurance Group
Dawn R. Mathison	Liberty Mutual Insurance Group
Angela L. Miller	West Bend Mutual Insurance Company
Timothy P. O'Brien	Kemper Insurance Companies
Kristine M. Olson	Hays Companies
Angel Ries	Liberty Mutual Insurance Group
Terese Anne Rogo	Hawkeye-Security Insurance Company
Tamara J. Rohlinger	West Bend Mutual Insurance Company
Geralyn M. Roth	Liberty Mutual Insurance Group
Sherri L. Rusch-Regenwether	Burkart-Heisdorf Insurance Agency
Leslie-Ann Russo	West Bend Mutual Insurance Company
Brenda L. Scheel	Unitrin Business Insurance
Stacy L. Schickert	West Bend Mutual Insurance Company
Brenton Michael Schlicher	Hawkeye-Security Insurance Company
Jennifer Schowalter	Marsh Inc
Stephanie M. Schreiber	ACUITY
Randal L. Schubert	Liberty Mutual Insurance Group
Camille K. Sterr	West Bend Mutual Insurance Company
Eric Stuart	ACUITY
Kelle K. Taylor	State Farm Insurance Companies
Suzanne Marie Van Camp	West Bend Mutual Insurance Company
Judith A. Wagner	Liberty Mutual Insurance Group
Damon Webb	State Farm Insurance Companies
Amy C. West	John B Collins Associates, Inc
Timothy R. Wiedmeyer	West Bend Mutual Insurance Company
Brian E. Wiza	Badger Mutual Insurance Company
Nancy A. Wodarczyk	General Casualty Co of WI

If You're Retired, Don't Overpay

If you're a retired CPCU, we have great news. You can still enjoy all the benefits of Society membership—and at a reduced cost.

Regular Retired Members

Members who have reached age 62 and are retired from full and active employment pay one-half the current CPCU Society dues annually, one-half of any appropriate section dues, and one-half of the Greater Milwaukee Chapter dues.

Lifetime Retired Members

Members who are eligible for Regular Retired membership may enjoy the privileges of lifetime membership within the Society by making a one-time payment of 300 percent of the then-current Society dues, provided the applicant has been a regular or retired member for 15 consecutive years prior to application for lifetime retired status. The Greater Milwaukee Chapter waives chapter dues for lifetime retired members.

If you have any questions, call the Member Resource Center at 1-800-932-CPCU, option 4.

Please Keep Your E-Mail Address Current

The Milwaukee Chapter delivers all its communications and newsletters via e-mail instead of regular postal mail. The postage and printing savings will allow the Chapter to dedicate more financial resources to better serve your needs.

We need your help to ensure that your e-mail address listed in our membership database is correct. There are many ways you can change your e-mail address (or any other information). Simply pick any one of these options:

- Fill out the form that came with your dues statement and return it with your dues payment
- Call the CPCU Society Member Services Center at 1-800-932-2728
- E-mail the Member Services Center at membercenter@cpcusociety.org
- Log on to the National CPCU website at www.cpcusociety.org and click the link to “Update Your Membership Information.”

We appreciate your help!

Calendar of Upcoming Events

Your Chapter directors and board members have been planning some great events for our chapter! Some details are yet to be set for many of these items – but here is a preview so you can mark your calendars accordingly.

- November 8, 2007 **All-Industry Day**
11:30 Social Time, 12:00 Luncheon, with program following
Italian Conference Center, 631 E. Chicago St., Milwaukee, WI
- 8:15 am to 11:45 am CE Class: "Hidden Coverages"
1:45 pm to 4:30 pm CE Class: "Closing the Gaps in Property
Insurance"
- December 2007 **CE Class:** Details to be announced
- December 7, 2007 **Joint meeting with Civil Trial Council of Wisconsin** (Wisconsin Dells)
- January 22 & 23, 2008 **NLI – Strategic Thinking & Strategic Planning Workshops**
January 22 location: ACUITY (Sheboygan, WI)
January 23 location: Pewaukee, WI
- February 13, 2008 **Joint luncheon meeting with RIMS** (Maggiano's at Mayfair)
- April 2008 **Ethics Awareness Month: Luncheon Meeting**
Speaker: Glen Pomeroy – Swiss Re
Location: Maggiano's at Mayfair
- April 2008 **CE Class:** Details to be announced
- April 2008 **10th Annual Bluesfest**
Details to be announced
- May 6, 2008 **Annual Meeting of the Greater Milwaukee Chapter**
Wisconsin Club, Milwaukee

Attend the CPCU Society's I-Day Workshops in Milwaukee, WI!

Hidden Coverages

Surprises in Court!

7:45 – 11:45 a.m.

Closing the Gaps in Property Insurance

What You Don't Know Will Surely Hurt You!

1:30 – 4:30 p.m.

presented by the CPCU Society
co-sponsored by the Greater Milwaukee Chapter

Register Today!

[Register online](#), or mail or fax the completed [registration form](#) to the CPCU Society.

When

Thursday, November 8, 2007

Where

Italian Conference Center
631 East Chicago Street
Milwaukee, Wisconsin 53202
(414) 223-2800

Cost

Class of 2007 CPCU Designees: \$69 for one workshop/\$138 for both workshops

CPCU Society members: \$79 for one workshop/\$158 for both workshops

Nonmembers: \$89 for one workshop/\$178 for both workshops

The registration fee includes one CE certificate per workshop, all handout material, and refreshments.

Note: The morning workshop will be followed by a luncheon and conferment ceremony for new designees of the Greater Milwaukee Chapter. To purchase a ticket for the luncheon, please e-mail [Tom Delahunt, CPCU](#) or call (414) 765-2300.

Continuing Education Credits!

Hidden Coverages has been **approved** for four (4) Continuing Education credits in Wisconsin and Illinois.

Closing the Gaps in Property Insurance has been **approved** for three (3) Continuing Education credits in Wisconsin and Illinois.

Please call (800) 932-2728, ext. 2767 to determine if the programs are approved for CE credits in other states, including those with adjuster CE requirements.

The AICPCU has approved Hidden Coverages for four (4) continuing professional development (CPD) units; and Closing the Gaps in Property Insurance for three (3) CPD units.

See the next page for more details on these seminars . . .

Hidden Coverages

Registration: 7:45 – 8:15 a.m.
Program 8:15 – 11:45 a.m.

What's It About?

This workshop will provide examples of how courts have interpreted insurance coverages leading to unexpected outcomes. The true insurance and risk management professional will know how court decisions can differ from the underwriter's intent!

Who's It For?

This workshop 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.

What You'll Learn

At the conclusion of the workshop, the attentive learner will be able to:

- Recognize hidden coverages found in various policies—intended and unintended—that have been found during litigation.
- Identify surprises that help or hurt your customers.
- Recognize which personal and commercial policies are changing because of these discoveries.
- Save your insureds by knowing these hidden coverages and gaps!

Closing the Gaps in Property Insurance

Registration: 1:30 – 1:45 p.m.
Program 1:45 – 4:30 p.m.

What's It About?

This workshop will enable the insurance professional to know what is and **is not** covered under a standard property policy; how various policies stack-up against each other; and how to avoid costly errors when managing property loss exposures.

Who's It For?

This workshop is designed for professionals who must protect the interests of their own and clients' organizations, including agents, brokers, underwriters, claim professionals, risk managers, and attorneys.

What You'll Learn

At the conclusion of this workshop, the attentive learner will be able to:

- Better understand the ISO Building and Personal Property Coverage Form.
- Apply the most frequently used endorsements to modify coverage.
- Utilize methods to determine valuation and ensure proper coverage by expanding or restricting various policy definitions.
- Explain additional coverages and extensions of coverage.
- Compare the ISO standard form to company specific forms to enable you to compete in today's marketplace.

Instructor for Both Workshops

R. Bryan Tilden, CPCU, CIC, CLU, is a national lecturer and expert witness in the field of insurance. Prior to starting his own firm, Tilden and Associates, he was the director of technical affairs and director of education for IIANC. Tilden has been active in insurance education as a grading panel member for the Insurance Institute of America and the American Institute for Chartered Property Casualty Underwriters. In 1988, IIANC presented him with the Ernest F. Young Education Award, and in 1989 Agent of the Year. Tilden has taught in schools for both the PIA and IIAA, been a speaker at RIMS and CPCU Society meetings, and has spoken at various conventions.

The views and opinions of the speaker are his own and not necessarily shared by the officers, members, or staff of the CPCU Society.

Questions?

Contact the CPCU Society's Member Resource Center at (800) 932-CPCU, option 4, or send an [e-mail](#).