

## President's Perspective



*Leona Hay, CPCU, AINS Chapter President 2017*

Spring is here and it has been an exciting past several months for the Connecticut CPCU Society Chapter, Inc.! We have been busy with hosting networking events, volunteering, learning, and educating others.

Before I go further – Congratulations are in order! I could not be more pleased to announce that the Connecticut CPCU Society Chapter has earned the “Gold” level for the 2016 Circle of Excellence Recognition Program! Congratulations to each and every one of our members, because we could not have achieved this honor without you. In order to achieve Gold, each chapter is scored on three strategic goals:

1. Provide relevant knowledge
2. Empower professionals to succeed
3. Engage future generations of leaders

For 2017, we will continue to keep these goals top priority in our

chapter. Enhancing the insurance industry, enriching the careers of our membership, and giving back to the community remain the focus of our chapter.

As I mentioned earlier, we have been quite productive this past Winter/Spring, We have been fortunate to have had several exciting meetings, where we were able to collaborate with several key partners:

- In February, we held a joint meeting with HAIP at the Gallery in Glastonbury, with a guest speaker on Cyber Risk
- In March, we held a half day Ethics Course worth 3 CE Credits, instructed by Peter Gabis
- In April, we partnered with the CT FBI and Homeland Security to present a half day seminar on Active Shooter Awareness

It has been an honor to interact with so many passionate and energetic professionals in our industry.

Upcoming 2017 events include:

- A May Diversity meeting on May 23rd, where we will have a panel of Diversity Network leaders from several area insurance companies speak to us on their individual Diversity Network accomplishments and Initiatives
- On June 12th, we will hold our annual Golf Tournament at the Wampanoag Golf Club in West Hartford to benefit our CT Chapter CPCU Good Works Committee, The money raised from this event goes to fund numerous local charitable organizations and scholarships for deserving students

The 2017 CPCU Conferment Ceremony and annual meeting is

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## President's Perspective

being held in Orlando in September. So far, we have 15 new CPCU's that have earned the designation for 2017! The list of 2017 new designees is currently housed on our chapter website. I encourage you to take a look at the list and if you recognize any names or they are in your organization, please make an effort to reach out to them. As new designees, these next generation of insurance professionals would surely benefit from the more seasoned

CPCU members reaching out to encourage them to become involved in the chapter and to experience the rewards of becoming a member.

Please continue to check our CT website and keep an eye out for email blasts regarding upcoming chapter events and news. You can also receive updates and information through Facebook, LinkedIn, and Twitter. Don't forget to log in to the society website <http://www.cpcusociety.org/> where you will have access

to information on the 2017 conferment, sign up for webinars and interest groups, and also log your continuing education.

I hope you will join us for future meetings and events and if you have any questions, please feel free to reach out to me or any of our board members. I look forward to visiting with some of you at conferment in Disney World. It is sure to be a great time! Happy summer to all!

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## March 9, 2017 Monthly meeting: Ethics CE

March is Ethics Awareness month. Keeping with tradition, on March 9, 2017 we offered a three hour Ethics seminar, presented by Peter Gabis, CPCU, JD, MBA, GCA, and Corporate Trainer

at Farmers Insurance. Participants earned three CE credits for attending.

We are so appreciative to Peter for teaching this class for the third consecutive year! He led a dynamic class

that fostered interesting discussions among the participants. Thank you, Peter! As a gesture of our gratefulness, we donated \$100 to the American Cancer Society in memory of Peter's father Stanley Gabis.

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## Continuing Education for CPCUs

The risk management and insurance industry is continuously evolving, and CPCUs, as leaders in the industry, must be at the forefront of emerging trends. The CE for CPCUs program encourages CPCUs to stay up to date on the latest risk and insurance knowledge, while also providing a way to showcase their educational efforts. Through this program, we hope to not only increase the value of the CPCU designation, but also to better allow CPCUs to set an example for others in the industry.

All CPCUs must complete continuing education activities to be consid-

ered active participants in the CE for CPCUs program. To remain active, you must complete 24 credit hours of continuing education in each reporting period. Each reporting period will be two years long, with the exception of the initial reporting period which is determined by your matriculation date and CPCU completion date.

Activities that qualify for CE for CPCUs credit include:

- The Institutes – Exams, online courses, SMART Practice Exams and Leadership Education.

- The Institutes CPCU Society –The Knowledge Center, educational events and webinars.
- Additional Activities – Practice-oriented content, employer training, education from colleges, universities or other credentialing providers and any state licensing CE activity.

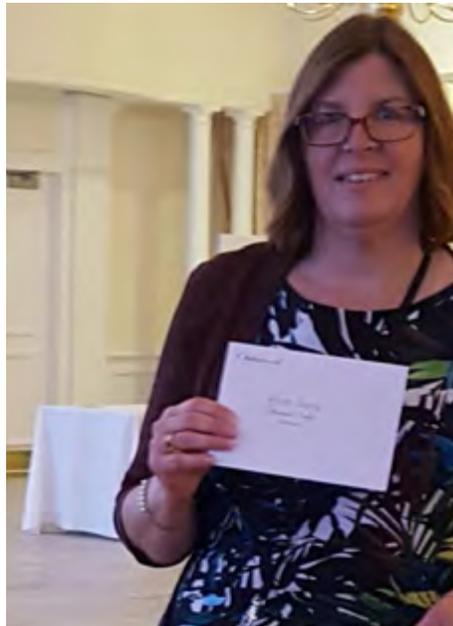
For full details, please read the Continuing Education for CPCUs Program Handbook which can be accessed by clicking on this link: [https://www.theinstitutes.org/sites/www.aicpcu.org/files/ti\\_continuing\\_education\\_for\\_cpcus\\_program\\_handbook\\_4.pdf](https://www.theinstitutes.org/sites/www.aicpcu.org/files/ti_continuing_education_for_cpcus_program_handbook_4.pdf)

## Blue Goose International's Industry Wide Celebration

The CT Chapter CPCU Society donated a twosome for the Blue Goose's celebration for the raffle to benefit Arthur C. Luf Children's Burn Camp (Connecticut Burns Care Foundation) which is a free camp for children between the ages

of 8-18 who have survived life altering burn injuries. The event was held at the Aqua Turf in Southington and according to raffle hosts raised thousands for the camp that night and to date has raised over \$95,000 for local charities.

The event flyer thanked the CT Chapter for our participation as well as many other CT Insurance Organizations. Deb Bartucca and Wendy Bernard attended the event. We ran into some of our HAIP friends and both came home with a raffle prize!



## April Meeting – FBI Active Shooter Awareness Seminar

We recently held a half day seminar on April 13th in conjunction with the CT FBI Community Relations Unit, who sent outreach specialists from their FBI Community outreach team to engage with us.

Since it is critical for CT Risk Managers to be acting now to train employees, develop emergency plans and ensure business continuity provisions are in place in the event of an Active Shooter situation, we were honored to have these community outreach specialists here to partner with us to teach us more about crime prevention, planning and awareness.

The meeting was held at The Holiday Inn East Hartford and with almost 60 in attendance, we started the morning with a breakfast buffet, which was followed by an exciting roundup of FBI Specialists speaking on the following topics:

- Recognizing Domestic Violence in the Workplace – What could happen? A discussion on the psychology of domestic violence was presented by Dr. Mary Cheyne
- Active Shooter Awareness discussion presented by FBI Special Agent Judy Eide. This was an informative session allowing us

to see the day in the life of an FBI Agent.

- We watched the movie, “The Coming Storm”, which is an emotionally charged movie created by the FBI, dramatizing the aftermath of a campus shooting, weaving within the storyline the best practices and lessons learned from active shooter incidents that have occurred throughout the United States
- FBI Victim Specialist Courtney Litowitz discussed the job of a victim specialist and gave examples of Federal Crimes in the

## April Meeting – FBI Active Shooter Awareness Seminar (continued)

Workplace. She went on to shed light on the various programs in place to assist victims of tragedies across the U.S.

- We ended with a Panel Discussion that was filled with questions for the specialists from the audience

CPCU members in attendance earned up to 3 CE Credits for the CPCU CE Program – 1 CE credit per hour.

We are tremendously thankful to the CT FBI Community Outreach team for taking the time out of their busy schedules to share their stories with

us. It was truly an impactful morning for all in attendance. A special thanks for our very own, Cheryl Constantine for suggesting this seminar and for working so hard to bring it to fruition!



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## Meet Mary Ellen Dillon, CPCU



Mary Ellen Dillon is currently employed by Aspen Re as a Reinsurance Credit Control Analyst in the Finance Department. She has been in this position for the past 2 years. She started her insur-

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ance career at The Hartford as a Financial Systems Analyst in the Reinsurance Accounting Department. Subsequent positions include Staff Accountant with Alexander Howden North America, Reinsurance Accounting Manager with Aon Benfield and Billing Service Coordinator with Sedgwick. Mary Ellen is a graduate of South Windsor High School. She holds a BS Degree in Education from the University of Connecticut, and completed the Accounting and Business curriculum at Central Connecticut State University.

Mary Ellen holds several designations from the Institute including the CPCU, ARe and AINS. She currently serves as the Director, New Designees on the 2017 Connecticut CPCU Society Chapter Board of Directors.

## May Meeting: Diversity & Inclusion Panel Discussion

### Location

Holiday Inn, 100 East River Drive,  
East Hartford CT 06108

### Topic

Embrace the Power of Difference!

Join our esteemed panel of industry professionals, while they discuss how diversity impacts the ability to make decisions and influence outcomes in their respective organizations, the value of diversity networks, the challenges they face, and what important diversity and inclusion initiatives are underway for 2017.

### Moderator

Marianne Vanech, LGBT & Allies  
Events Chair, Director, National  
Underwriting – Travelers

### Panel

- Leslie T. Soler, Hispanic Leadership Network, Assistant General Counsel, The Hartford

- Rachel Anderson, Prof. Women's Network, Director, Strategic Claims Management, The Hartford
- Brad Kleinerman, LGBT & Allies Co-Chair, 2VP HR, Claim Services, Travelers
- Robert Braswell, Disability Network Chair, 2VP, Claim IT, Travelers
- Laura Williams, Diversity Council, Munich Re US P&C, Finance Director, Hartford Steam Boiler

### Agenda

- 7:30 a.m. Registration & Breakfast
- 8:00 – 8:15 Lee Hay, President – CPCU Society Updates
- 8:30 – 9:15 Panel Discussion
- 9:15 – 9:30 Q & A

Breakfast buffet with a Variety of Bakery Fresh Pastries, Eggs, Potatoes,

Bacon Orange Juice, Coffee and an Assortment of Teas

CPCU Members enjoy free breakfast! Earn 1 CPCU CE credit. (Not applicable for Producer License CE) If you are a paid member and cannot attend, please feel free to register someone else in your place.

Non-CPCU Society members and guests will be charged \$28 for Breakfast and the seminar. Please bring check or cash to the event. All attendees, please go to the CT Chapter Website to register! <http://connecticut.cpcusociety.org/meetings-events>

Company tables of eight are available for \$215. Company name and logo displayed.

Deadline for registration is Monday, May 22nd. Please contact Cheryl Constantine for company tables and with questions. 860.277.4708 or 860.371.1419

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## High School Career Fair Expo at Wesleyan University

As part of our continuing efforts to encourage younger generations to consider a career in insurance, the Connecticut CPCU Society Chapter attended the High School Career Fair Expo at Wesleyan University. The event was held on Thursday, April 27th in the Freeman Athletic Center in Middletown, CT. It was sponsored by the Middlesex County Chamber of Commerce's Business & Education Partnership

Advisory Council, the Middlesex Consortium of Schools, and Wesleyan University's Center for Community Partnerships. Participating high schools included Middletown, Cromwell, Durham/Middlefield, Portland, East Hampton, Chester/Deep River/Essex, Haddam/Killingworth, and Vinal Technical High School. Our Director of Candidate Development, Kathleen McCarthy, represented the Chapter and shared

her career experiences with students to promote the insurance industry and explain the benefits of the CPCU designation. Many students expressed interest in actuarial science, so next year we would like to include a representative with experience in that field. Any interested parties should reach out to a Board member.

## 2017 Leadership Summit

Each year, The Institutes CPCU Society holds an a Leadership Summit designed to provide chapter and interest group leaders with the training and insights they need to be as successful as can be in their roles. This year's annual Leadership Summit was held on April 20-22 in Baltimore, MD. The focus was empowering volunteer leaders to effectively meet our recruitment and retention goals by providing professional development and knowledge needed to hone in on leadership skills – an effort that not only affects volunteer work for the CPCU Society but also for overall career growth. I was happy to attend and represent our Connecticut Chapter, along with Cheryl Constantine who spearheads our chapter's Diversity efforts and also serves as the National Diversity Committee chair.

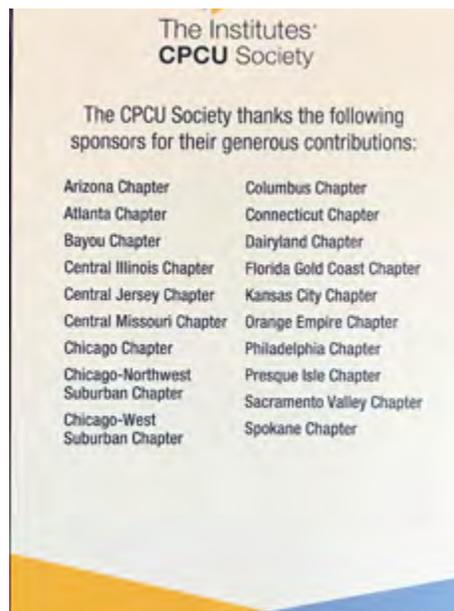
There were so many great sessions focused on various training opportunities including:

- Financial Planning and Management.
- Planning and Hosting engaging meetings for your membership.
- Membership Engagement.
- Tips for Communicating with Members.
- Compelling Conversations: Influencing Positively and Powerfully.
- Tips for Running Successful Boards and Committees.

There were 370 people in attendance which is a near record for The Institutes CPCU Society! It was a great event that allowed for networking with leadership in chapters across the country. There were also engaging speakers presenting on important

current topics such as ethical conduct, the importance of Diversity and building confidence as a leader.

This event reinforced the CPCU Society's commitment to providing relevant knowledge, opportunities to empower us to be leaders and engagement at all levels. Our chapter was also formally recognized during the awards luncheon for achieving Gold Circle of Excellence status! What a great accomplishment! I am so proud to be a member of the CPCU Society and even more proud of the excellent work our Connecticut Chapter does for the industry and community at large!



# Chapter Good Works

## Recent Activities

- In November 2016, the CT Chapter donated \$1500 to the CT Fire Academy for the purchase of a Rescue Chain Saw.



- We partnered with HAIP in the February joint meeting to support St Martin DePorres; an organization that provides services for at-risk youth in Hartford, including homework assistance and after-school and weekend activities. HAIP and CPCU members donated \$260 and an abundance of healthy snacks and school supplies. Alyce DeAngelo and Lori Gaglione presented these donations, as well as the Chapter's \$1,000 donation, in February.



- Lee Hay attended the St. Philip House Mad Hatter Ball on April 22nd, and presented a \$1,000 check from the CT Chapter.
- Betty Shepard and Alyce DeAngelo presented our \$1000 donation to Wheeler Clinic to support their Positive Parenting Program.



## Upcoming Activities

- The CT Chapter will make donations to the following organizations in May and June:
- Fidelco
- Circle of Life
- My Sisters Place
- Malta House of Care

## Other

The Scholarship application review process is underway. The awards will be presented to the recipients at the Chapter meeting on May 23rd.

# 2017 Golf Tournament Registration

Tee It Up!  
**CONNECTICUT CHAPTER  
 CPCU SOCIETY  
 ANNUAL CHARITY  
 GOLF TOURNAMENT**  
 ALL PROCEEDS TO BENEFIT THE  
 CONNECTICUT CHAPTER'S  
 CHARITIES



**Wampanoag Country Club**  
 60 Wampanoag Drive  
 West Hartford, CT  
 June 12, 2017

- 10:30am: Registration
- Range, Practice Green and Locker Room available
- 11:00 am: Lunch
- 12:00 pm: Shot Gun Start/Scramble Format
- Dinner, Raffle & Awards following Golf
- \$175 per Individual Player
- \$875 per Foursome (includes Lunch, Golf and Cart, Dinner and Tee Sponsor Sign)
- \$200 for a Tee Sponsor Sign without a Foursome. Additional sponsorship opportunities and benefits at the Bronze, Hole-in-One, Silver, Gold and Platinum Levels.
- All registrations must be received by May 31st

- No metal spikes. Proper attire required
- Open to non-CPCUs — a great way to entertain agents and clients or just have fun with coworkers or friends!!
- Directions on the back of this form
- Confirmation of your reservation will be sent to the Captain's e-mail address/fax number
- For more Information, please contact Jennifer Bertagna: 860.678.4039 or [jbertagna@lockton.com](mailto:jbertagna@lockton.com)
- Sponsors & Raffle Prize donations are greatly appreciated. Please contact Jennifer Bertagna

CAPTAIN'S NAME \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_ E-MAIL: \_\_\_\_\_ FAX: \_\_\_\_\_

COMPANY (FOR TEE SPONSORSHIP SIGN): \_\_\_\_\_

NAME & HANDICAP FOR EACH PLAYER:

1. \_\_\_\_\_ HDCP \_\_\_\_\_ Phone \_\_\_\_\_ E-Mail \_\_\_\_\_

2. \_\_\_\_\_ HDCP \_\_\_\_\_ Phone \_\_\_\_\_ E-Mail \_\_\_\_\_

3. \_\_\_\_\_ HDCP \_\_\_\_\_ Phone \_\_\_\_\_ E-Mail \_\_\_\_\_

4. \_\_\_\_\_ HDCP \_\_\_\_\_ Phone \_\_\_\_\_ E-Mail \_\_\_\_\_

AMOUNT ENCLOSED: \$ \_\_\_\_\_

Make check payable to:  
**Connecticut CPCU Society  
 Chapter, Inc**  
 and send with form to:  
**Marianne Vanech, CPCU**  
 26 Chestnut Hill Road  
 West Simsbury, CT 06092  
 Tel: 860 490 6198  
 E-mail: [mvanech1@aol.com](mailto:mvanech1@aol.com)

# 2017 Golf Tournament Sponsorship



**CT Chapter CPCU Society**  
**Annual Charity Golf Tournament**  
**Monday, June 12, 2017**  
**Wampanoag Country Club**  
**60 Wampanoag Drive**  
**West Hartford, CT**

## 2017 SPONSORSHIP OPPORTUNITIES

<b>Platinum Sponsor</b> <b>\$2,500</b>	<ul style="list-style-type: none"> <li>• Includes 4 Players</li> <li>• Two Full Page Ads in Program</li> <li>• Sponsor Board Display</li> <li>• Two Tee Signs</li> <li>• Recognition at the Dinner</li> </ul>	<b>Bronze Sponsor</b> <b>\$500</b>	<ul style="list-style-type: none"> <li>• Name in Program</li> <li>• Sign at Practice Putting Green</li> </ul>
<b>Gold Sponsor</b> <b>\$1,500</b>	<ul style="list-style-type: none"> <li>• Includes 2 Players</li> <li>• Full Page Ad in Program</li> <li>• Sponsor Board Display</li> <li>• One Tee Sign</li> <li>• Recognition at the Dinner</li> </ul>	<b>Tee Sponsor</b> <b>\$200</b>	<ul style="list-style-type: none"> <li>• Name in Program</li> <li>• One Tee Sign</li> </ul>
<b>Silver Sponsor</b> <b>\$1,000</b>	<ul style="list-style-type: none"> <li>• Includes 1 Player</li> <li>• 1/2 Page Ad in Program</li> <li>• Sponsor Board Display</li> <li>• One Tee Sign</li> <li>• Recognition at the Dinner</li> </ul>	<b>Raffle Prize Donor</b>	<ul style="list-style-type: none"> <li>• Name in Program</li> </ul>
<b>Hole-in-One Sponsor</b> <b>\$750</b>	<ul style="list-style-type: none"> <li>• Name in Program</li> <li>• Sign at Tee of Par 3</li> </ul>	<b>Make Checks Payable to:</b> <b>Connecticut CPCU Society Chapter, Inc</b>	Send a copy of this form and check to:  <b>Marianne Vanech, CPCU</b> 26 Chestnut Hill Road West Simsbury, CT 06092

**Indicate Sponsorship Preferred**

- Platinum Sponsor
- Gold Sponsor
- Silver Sponsor
- Hole-in-One Sponsor
- Bronze Sponsor
- Tee Sponsor
- Raffle Prize Donor

**Company Name:** \_\_\_\_\_

**Contact Person:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Raffle Prize(s) Donated:** \_\_\_\_\_

*Raffle proceeds benefit CPCU supported charities*