

President's Perspective



*Leona Hay, CPCU, AINS
Chapter President 2017*

Happy New Year and welcome to our returning members and to our new members! It's hard to believe we have recorded another amazing year in the history of our chapter and I am looking forward to an equally impressive 2017 for all of us.

Reflecting back upon 2016, our chapter has truly accomplished a great deal. First and foremost, we were proud to welcome 51 New Designees from all over Connecticut to our chapter, representing 25 different Insurance companies, agencies and institutions. This is one of the largest classes we have had in recent years! We celebrated their accomplishment with a "luau" gathering in downtown Hartford on September 8th and then again at our annual conferment celebration in October.

In 2016, our chapter was also chosen as one of a select few CPCU chapters to pilot our new CPCU Diversity Committee, headed up by Cheryl Constantine. This committee went

above and beyond in 2016, working closely with both High School, Inc. and the University of Hartford's Barney School of Business students to plant the seed in engaging the next generation of insurance professionals.

On behalf of the board, I would like to extend a big thank you to our outgoing President, Jennifer Santucci. Under Jennifer's guidance, our chapter delivered another banner year, with a myriad of accomplishments. Thank you, Jenn for your leadership and for all you have done for us!

It is not only a privilege, but also an honor to be your incoming 2017 CT Chapter President. I am pleased to be working with such an experienced and diverse board of directors, and look forward to hearing the ideas from the board, and also from all of our CT Chapter members. New to the board this year are Wendy Bernard, as our new Director of Education and Mary Ellen Dillon, a 2016

New Designee, as our new Director of New Designees.

If there are any topics of interest, or events you would be interested in attending, please let one of our board members know. As a group, we plan to continue the tradition of bringing quality monthly chapter meetings with interesting speakers and topics. We also will continue to foster our partnerships with other area insurance industry organizations, including RIMS, HAIP and IDMA.

The majority of our monthly meetings will continue to be held at Holiday Inn, located in East Hartford, however there will be several of our meetings held at different venues in the area. We will be posting the full listing of our scheduled meetings to our website shortly.

As with every new year, we want to encourage each and every one of you to become paid CPCU members so that you can utilize all the tools available to you through the Insti-

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President's Perspective

tutes and CPCU Society. We also encourage each of you to participate in our meetings or perhaps to join one of our committees. It is a great way to network and have continuous learning opportunities. As a paid CPCU Member you receive the following benefits:

Attendance at our monthly breakfast, lunch and dinner meetings is free

More than \$2,000 worth of technical education resources, including free webinars that count towards your CE credits and free subscrip-

tions to CPCU Society Publications covering emerging trends and issues

Exclusive benefits from The Institutes, including unlimited free access to The Institutes' ten online CPCU® courses, covering more than 1,000 topics, as references and up-to-date knowledge refreshers. You also get a 25% discount on Institutes study materials

Unlimited professional development through engagement with the CPCU Society, its chapters and its interest groups, including access to a specialized jobs database and also

the ability to get involved with our new mentoring program

Our industry is rapidly changing and it is our hope that we can continue to engage our active membership as well as attract new talent to join our chapter activities. Consider attending one of our monthly meetings or joining us for a social networking event. I personally am hoping to meet more of our membership in the upcoming year. I am excited to begin the year as your new president and am looking forward to an engaging and fulfilling 2017!

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.

Continuing education for CPCUs encourages people working toward and those holding the Chartered Property Casualty Underwriter (CPCU®) designation to stay up-to-date on the latest insurance knowledge, while also providing a way to showcase their educational efforts.

Through this program, professionals who earn the CPCU designation can:

- Create value for their career, their organization and the industry
- Participate in a program with real impact

- Select educational activities most relevant to them
- Elevate their experience with the CPCU Society

How It Works

- Complete 24 hours of practice-oriented credits every two years.
- Earn credits through The Institutes, the CPCU Society, CEU, and other qualifying activities.
- Benefit from automated reporting of credits earned through The Institutes, CEU and select CPCU Society offerings.
- Submit the \$189 reporting fee for each reporting period. For CPCU Society members, this cost is waived.
- Now available, The Institutes CE for CPCUs reporting tool is an

online resource that will support your participation in The Institutes CE for CPCUs program, allowing you to easily view and report completed continuing education activities and track your progress through the program.

The Institutes are encouraging all CPCUs to honor their commitment to continuing education. While no one's CPCU designation will be invalidated for failing to report continuing education, CPCUs who comply with the reporting requirements will be publicly recognized for their commitment to their industry and career.

For additional information on the program including what activities count towards credits, please visit:

<http://ceforcpcu.theinstitutes.org/>

Chapter Good Works

On February 18th, The CT Chapter presented St Martin DePorres with a monetary donation of \$1,000.

At the February joint meeting with HAIP, we collected money, school supplies and healthy snacks to support the after school and weekend programs that St Martin DePorres provides for at-risk children in Hartford. We also presented the \$225 and in-kind items collected at the meeting.

Upcoming Activities

The CT Chapter Scholarship

A copy of the application and contact details have been posted on the CT Chapter Website. Applications

must be received by April 15th to be considered.

The following eligibility requirements apply:

- The scholarship is available to immediate family members of CPCUs in good standing in the National Society and the CT Chapter CPCU. Eligible immediate family members include children, stepchildren, grandchildren, nieces, nephews, siblings and individuals for whom the member is a legal guardian.
- The scholarship is available to high school seniors who have been accepted to attend, or college students who will continue to attend, one of the following types of educational institutions:

a college or university (undergraduate or graduate level); a school of nursing, art, or music; a trade school.

- Multiple family members of eligible CPCU's may apply in the same year.
- Award may not exceed the educational costs of the applicant, including tuition, fees, books and study materials.

Other

Anyone interested in joining the Committee, or in attending one of our meetings to see what we do, can contact Chairman Esther Zinolli, esther.zinolli@thehartford.com or Director Deb Bartucca, dbartucc@travelers.com

CPCU Joint Meeting with HAIP February 7, 2017

Our annual joint meeting with HAIP (Hartford Association of Insurance Professionals) was held at The Gallery in Glastonbury.



At the meeting, school supplies, healthy snacks and monetary donations were collected for St. Martin De Porres House in Hartford. St.

Martin De Porres House is a non-profit organization in the North End of Hartford that houses the homeless, feeds the hungry and works with the children in the area and is one of our longstanding CT Chapter CPCU Good Works Committee charitable organizations that we sup-



port. We thank everybody for their generosity! It means so much to give back to our community!

Our guest speaker for the meeting was Scott Garcia, Certified Cyber Risk Manager for Smith Brothers. Mr. Garcia gave an intriguing presentation on how companies can manage Cyber Risk.

All in all, another wonderful collaboration with HAIP. We are so proud of our partnership. Special thanks to Donna Daniolos of HAIP for organizing the logistics for this great meeting. We look forward to future meetings together!



CPCU Dues Renewal Reminder

This is the time of year that CPCUs need to renew their membership. Invoices have been mailed out by National and if you haven't received an invoice and would like one, you can email Chapter.Services@cpcusociety.org. However, the CPCU society has made paying dues more convenient and you can now

pay dues online. Simply log into the National CPCU site (www.cpcusociety.org) and log into your account. In the upper right hand corner of the screen there is a drop-down arrow, when you click the arrow, an option for PAY DUES shows up.....it's as simple as that!!!

The benefits of membership include networking with other CPCUs, many complimentary Webinars and publications, volunteer and leadership opportunities and interesting topics presented at the monthly Chapter meetings.

Ethics Awareness Month – March 9, 2017 Breakfast Meeting

An Ethics Continuing Education course will be offered during our Thursday March 9, 2017 Breakfast Meeting.

Location:

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

Schedule:

- 8:00-8:30 registration & networking
- 8:30-9:00 Breakfast buffet, Variety of Bakery Fresh Pastries, Eggs, Potatoes, Bacon Orange Juice, Coffee and an Assortment of Teas
- 9:00-12:00 Ethics CE class

Guest Speaker:

Peter J. Gabis, JD, MBA, GCA, AIC, CPCU, API from Learning Delivery University of Farmers

Topic:

Ethics course for Connecticut CE Credit

- CPCU Members enjoy free breakfast / a \$25.00 fee applies to CE course –
- Non-CPCU Society Members/ Guests can attend both the breakfast and CE for \$30.00
- Please register for the March 9th breakfast on the website and bring payment via cash or check at registration.
- There is a \$25 charge to attend the Ethics presentation which

includes the CE filing fee. Please bring check or cash to the event.

- You do not need attend both the Ethics presentation and the Breakfast. If you can only join for the Breakfast, there is NO charge for active CPCU chapter members.
- Non-CPCU Society members and guests will be charged \$30 for Breakfast and the course. Please bring check or cash to the event.
- Please go to the CT Chapter Website to register for either the Class or the breakfast or both!!!
<http://connecticut.cpcusociety.org/>

Introducing the NEW CPCU Society Mentoring Program!

The Institutes CPCU Society recently introduced a new member benefit, the CPCU Society Mentoring Program, as a valuable next step in helping members and candidate members explore career development opportunities and succeed in the workplace. The new program will allow members of all career stages to search for a mentor based on chapter, industry interests and more. Involvement is open to all paid CPCU Society members and candidate members.

Mentees are CPCU students or early to mid-career professionals who want guidance and advice to further their careers and to be successful. Mentees can expect to strengthen and build their networks, and gain the skills and confidence necessary to excel.

Mentors are experienced professionals who guide and advise mentees in their career paths to help them succeed. A mentor's role is to inspire, encourage, and support their mentees.

Being both a mentee and a mentor is welcomed. We hope that our valuable members of the Connecticut Chapter will consider getting involved in this initiative. Building up our pool of volunteer mentors will ensure that members seeking career development can find a great match. To learn more about the program and sign up to become a mentee or mentor, please visit the following link and select the appropriate sign up prompt:

<https://cpcumentoring.chronus.com/about>

Meet our 2017 Connecticut CPCU Society Chapter Board of Directors!

Leona D. Hay, CPCU, AINS President

Lee joined Travelers in 2015 as a Manager of Data Management in Corporate Finance. She previously worked for Sedgwick Claims Management as Director of Client Services. For the 23 years prior to joining Sedgwick, Lee was employed by The Hartford Financial Services Group, where she held various positions in both Personal and Commercial Lines. Lee graduated Magna Cum Laude in 2007 from Albertus Magnus College, earning a B.S. in Business Management. She is a 2011 CPCU Designee, and was selected to be one of the 2 official Class Spokespersons for the Class of 2011 at the conferment ceremony in Las Vegas. Lee held previously CT Chapter Board positions of Director, Candidate Development and as a member of the Good Works Committee. Lee's proudest achievement in life has been raising her 6 children and her favorite words to live by are "You Will...Because You Can!"

Oanh Nguyen, CPCU, RPLU Vice President

Oanh has been at Travelers in the Bond & Specialty Insurance division since 2006. She currently serves as an Underwriting Manager for Private and Non Profit entities with responsibility for the New England region. She has close to a decade of experience across Management Liability coverages including D&O, EPL, Fiduciary and Cyber Liability. She is a certified CE instructor in CT, ME, MA, NH, NJ, PA, RI and VT. She is also licensed in many states as a P&C Producer and Surplus Lines Broker. Oanh obtained

the CPCU designation in 2012 and the RPLU (Registered Professional Liability Underwriter) designation in 2014. Prior to joining Travelers, Oanh worked at American Family Insurance as a Personal Lines Underwriter and at Wells Fargo in various banking roles. She graduated from the University of St. Thomas in St. Paul, MN with a bachelor's degree in Business Administration, majoring in Finance.

Daphne Tong, CPCU, ARM, ASLI, AU Secretary

Daphne is a Director in the Business Insurance Platform – Property & General Liability at Travelers working as a strategy lead for key initiatives. Daphne was an Excess & Surplus underwriter at Guilford Special Group (now IFG) prior to joining Travelers. Daphne obtained the CPCU designation in 2012. Daphne served as Director of New Designees last year.

Jufeng (James) Peng, CPCU, Ph.D, ASA – Treasurer

James is currently employed as a Director & Data Scientist at The Hartford. His primary responsibility is supporting some analytics initiatives for The Hartford's Commercial Markets. James has been working in insurance industry since January 2006. His prior experiences include work at Progressive and State Farm. James is a 2014 CPCU designee. He holds a Ph.D. in Mathematics and M.S. in Computer Science from Rensselaer Polytechnic Institute. He is also an Associate of Society of Actuaries.

Deborah Bartucca, CPCU, AIC Director, Good Works

Deb joined Travelers in 2013. She is a Director in Business Insurance Product and Platform, primarily responsible for General Liability and Professional Liability coverages. Previously she worked at AXIS Insurance as a Senior Product Analyst, responsible for Professional Liability coverages. She also worked for The Hartford, where she held positions in Claims and Product. Deb holds a BA from the University of Connecticut. She earned received her Supervisory Management(SM) certificate in 1992, her AIC in 2007 and her CPCU designation in 2012. Deb has served on the Good Works committee since 2012 and has been Director since 2016.

Kathryn Carroll, CPCU, AIC Director, Membership

Kathy has over 30 years of experience in the insurance industry and has been at Travelers since the mid-1990s. She currently works as a 2VP of Data Usability & Solutions and is a self-proclaimed "data geek". Kathy has a BS degree in Business Administration from University of Hartford with a major in Insurance. She earned her CPCU designation in 2010 and her AIC designation in 2012. Kathy is currently studying for her CIDM and AIDA designations. Kathy lives in Broad Brook, CT with her husband Wayne.

Diane L. Corcoran, CPCU Director, Visibility

Diane is enjoying a 32 year career in the Property & Casualty Insurance industry. Diane began her career at Cool Insuring Agency Inc., a large independent agency in Latham,

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NY. While at Cool, she held various positions from Commercial Account Representative to Assistant Marketing Manager. After 14 years, Diane transitioned to the insurance carrier side of the business becoming an underwriter at Merchants Mutual Insurance Company. After obtaining her CPCU designation in 2002, Diane accepted an Underwriting Manager position at First Cardinal Corporation, a TPA for 23 self-insured Workers' Compensation groups. In 2009, Diane joined Farm Family Insurance Company as a Commercial Lines Underwriting Manager at their Home Office in Glenmont, NY. Diane is currently employed at Travelers as an Underwriting Director for Select Accounts. She recently relocated to Connecticut from upstate New York. Diane holds a BS in Marketing/Management from Siena College. Diane was a former member of the NENY Chapter of CPCU Society and previously held the position Director, New Designees.

Wendy Bernard, CPCU, API Director, Education

Wendy has over 20 years of experience at The Hartford and is currently a Sr. Workers Compensation Product Manager. She has held a wide range of roles at The Hartford having worked in Personal and Commercial lines with the most recent 9 years exclusively dealing with Workers Compensation. She held producer licenses countrywide when in Sales and Service roles. Her educational experience includes a BA from UCONN in Business Data Analytics and is currently pursuing a

dual major MBA with Business Data Analytics.

Kathleen McCarthy, CPCU, CRIS Director, Candidate Development

Kathleen is a Commercial Lines Account Manager at retail brokerage firm TriPoint in Avon, CT. Before moving to TriPoint in the fall of 2014, Kathleen spent three years specializing in E&S General Liability Underwriting at IFG Companies in Hartford, CT. She was awarded the CPCU Presidential Scholarship in the fall of 2012 and completed her CPCU designation by February of 2014. Kathleen is now in her third term on the Board of Directors for the Connecticut CPCU Society Chapter. In addition to her CPCU, Kathleen is a designated Construction Risk Insurance Specialist (CRIS) and dually licensed as a Producer and Surplus Lines Broker by the State of Connecticut Insurance Department.

Mary Ellen Dillon, CPCU, ARe, AINS Director of New Designees

Mary Ellen joined Aspen Re in 2015 as a Credit Control Analyst in the Finance Department. She started her Insurance career at The Hartford in Ceded Reinsurance Accounting. Subsequent positions include Staff Accountant with Alexander Howden North America, Accounting Manager with Aon Benfield and Billing Service Coordinator with Sedgwick CMS (f/m Specialty Risk Services). Mary Ellen holds a BS from the University of Connecticut. She earned her AINS in 2014, her CPCU and ARe designations in 2016.

Governor's Message

A new year is in full swing and the CPCU Society is off to a great start. By now you should have received and, hopefully, paid your membership invoice. If not, reminder notices will be mailed out shortly. If you are on the fence, I urge you to attend one upcoming chapter event especially if the last time you attended an event was over a year ago. You will be pleasantly surprised by how much the CPCU Society has changed and the value that now comes with your membership. Leona does a great job outlining the benefits of membership in her article.

I extend a special thanks to all the outgoing board members. The Connecticut Chapter has set a great

example for the other chapters in the region. You have a very dedicated staff of board and committee members who devote a lot of time and talent to ensure you receive the most from your membership.

I am in the process of reviewing the Circle of Excellence submissions from our region's chapters. For those of you who are new to the Society, the Circle of Excellence is an Award Program wherein chapters are given a set of goals in three categories.

These categories are:

- Provide Relevant Knowledge
- Empower Professionals to Succeed

- Engage Future Generations of Leaders

At the end of the year each chapter has to submit an entry that outlines what they specifically did to meet each and every goal in each of these categories. Depending on how well they did, they may receive a Silver or Gold award. The awards are presented at the Leadership Summit held in the spring. This year's summit is being held in Baltimore, Maryland from April 20 – 22.

Still working on your designation? This year's Annual Meeting is being held at Disney's Coronado Springs Resort in Orlando, Florida from September 16-19. What a great place to celebrate your accomplishment!

For up-to-date Connecticut CPCU Society Chapter news and information, follow us on LinkedIn, Twitter, and Facebook!