



# News & Notes

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April 2008

Insurance Professionals of Roanoke

## Next Meeting

**Holiday Inn-Tanglewood  
April 17, 2008**

**Dinner 5:30**

**Menu:**

**GUEST SPEAKER:**

**Harley Cox  
Exec Director  
Eastern Appalachian  
Teen Challenge**

**Cost \$15.00**

**Contact Julie Harrell  
for Reservations  
jharrell@bbandt.com**

**Phone  
982-4616**

**Deadline: 10:00am  
Friday, Apr 11, 2008**

### Dear Members

Our official IPR year is almost over but we are certainly not slowing down. If you were at the March meeting, you heard about our plans coming together for the State council meeting which we are hosting in Roanoke in September, and Marcia Barber filled us in on some preliminary plans for the 2010 Region II Conference which will be hosted by the Virginia council...in Roanoke!

I am so excited that we are hosting these upcoming meetings in Roanoke. These conferences are a great opportunity to get a sense of the bigger picture of NAIW and I know we have a few new members who have not yet had an opportunity to attend a state or regional meeting – now's your chance. I remember that attending my first state meeting was when I began to understand more about NAIW and all it has to offer and when I really began to be more involved. I hope that those of you who will be first timers at these conferences will feel the same.

Please plan to join us for our monthly meeting on the 17<sup>th</sup>. I think you will enjoy our guest speaker, Harley Cox, with Eastern Appalachian Teen

Challenge. Thanks to Margaret and Donna for setting that up. We'll also be having our drawing for the winner of the NASCAR raffle. Please get your tickets and money to Chris, if you haven't done so already.

Our next big event will be our annual Appreciation Night on May 6, 2008. Trish Clark will be providing the details. You will not want to miss this one – invite everyone you can think of. We have a new venue for the event and an outstanding menu.

Robin Deatherage has recently posted some new photos on our website. Be sure to check them out at [www.iprva.com](http://www.iprva.com). A lot of these should have been posted long ago (my fault) but now that I have the camera/computer figured out I should be able to get them online much quicker in the future. Thank you, Robin for all your wonderful work on our website. Also later in this newsletter is a report of the Regional conference I attended in March. I shared this at the March meeting but wanted those of you who were not there to have an opportunity to read it.

Sincerely,

**Jessica**

President  
Jessica Mason, CPCU, AIS, CPIW  
Insurance Professionals of  
Roanoke

## 2006-2007 IPR Officers & Committee Chairpersons

OFFICERS		PHONE	FAX
<b>President</b>	Jessica M. Mason, CPCU, AIS, CPIW	983-4583	982-6507
<b>President Elect</b>	Sandra W. Bowling, ARM, AAI, CPIW, DAE	855-5157	344-4096
<b>Vice President</b>	Julie Harrell, CPIW	982-4616	982-6507
<b>Treasurer</b>	Sonya David, CIC	855-5152	344-4096
<b>Secretary</b>	Teresa Sloan	345-8500	345-5330
<b>Immediate Past Pres</b>	Trish Clark, ACSR, CPIW, DAE	855-5185	344-4096
<b>COMMITTEE CHAIRPERSONS</b>			
<b>Newsletter</b>	Margaret Byrd Wilson, CIC, CPIW, ACSR, DAE	855-5164	344-4096
<b>Public Relations</b>	Sandra W. Bowling, ARM, AAI, CPIW, DAE	855-5157	344-4096
<b>Membership</b>	Julie Harrell, CPIW	982-4616	982-6507
<b>Scholarship</b>	Cindy Friesland		
<b>Education</b>	Donna Amos, AAI, CPIW, ACSR, API, DAE	774-1669	774-4572
<b>Bylaws/Parliamentary</b>	Ann H. Huddleston, CPIW	342-2082	343-6339
<b>Legislative</b>			
<b>Gifts &amp; Flowers</b>	Melanie Hedgepath	774-4572	774-4572
<b>Hospitality</b>	Patricia Clark, CPIW, ACSR, DAE	855-5185	344-4096
<b>Safety</b>	Amy Campbell		
<b>Audit</b>	Freda G. Horn, CIC, CPIW	345-7721	345-4614
<b>Ways &amp; Means-Nascar</b>	Chris Nichols, CPCU, CIC, CPIW	983-4583	982-6507
<b>Golf Tournament</b>	Patricia Clark, CPIW, ACSR, DAE	855-5185	344-4096
<b>Reservation</b>	Julie Harrell, CPIW	982-4616	774-4572
<b>Scrapbook</b>	Michelle Hall, CIC	982-3511	777-6710
<b>Long-Range Planning</b>	Board Members		

Monthly Program		
August	Planning Meeting	Jessica Mason
September	Public Relations	Sandy Bowling
October	Welfare	
November	Ways & Means	
December	Hospitality	Trish Clark
January	Membership	Julie Harrell
February	Safety	
March	Legislative	
April	Education	Donna Amos
May	Hospitality	Trish Clark

**Reminder**  
**Holiday Inn requires that reservations for the monthly meeting be given to them on Friday prior to the Thursday meeting.**  
**Please call your reservations or email Julie Harrell [jharrell@bbandt.com](mailto:jharrell@bbandt.com) no later than 10:00am on the Friday prior to the Thursday meeting.**  
**No refunds will be available on reservations cancelled after the 10:00am deadline.**

# SECRETARY'S REPORT

March 20, 2008

The March 20, 2008 meeting of the Insurance Professionals of Roanoke was held at Holiday Inn Tanglewood and called to order at 5:44 pm by President, Jessica Mason, CPCU, AIS, CPIW. Jessica introduced the officers and welcomed our special guest, Marcia Barber, AIC, ACSR, CISR, CIC, CPIW, DAE, VA State Council Director. The collect was read by Melissa Maddox. There were 10 members present and 1 guest in attendance.

Following dinner, Jessica Mason introduced our VA State Council Director, Marcia Barber, AIC, ACSR, CISR, CIC, CPIW, DAE. Marcia is with Alpha Specialty Insurance. Marcia reported on the state activities and our focus on education; we will have 5 new CWC contestants for state in 2008; reminded us of the NAIW day in Richmond 5-20-08; reported on the Reach Out and Read Literacy Program (additional information can be found on NAIW website); reported on the recent Regional Conference and the bids for future conferences. VA State Council collectively will host the 2010 Regional Conference, to be held in Roanoke the first week in March. Marcia's theme this year is "Celebrate Your Success". We succeed through Teamwork, and using the "What Is Your Role in the Team" exercise, showed us although we are all diverse, each role player working together is the true meaning of Teamwork. Remember, there is no "I" in Teamwork.

## Business Meeting Followed:

Minutes: Approval of minutes tabled until the April meeting as our webmaster had not posted the March News & Notes on our website as of the day of the meeting; therefore Margaret Wilson emailed this to the members for review.

Treasurers Report: Revised October, November, December and January reports presented for approval. Following items discussed: (1) there will be another revision for October to correct a "wording only" error, amounts correct as presented (2) October's report notes \$250 expense as "starter" money for golf tournament; this should be a "wash" and unable to determine when this same amount was deposited (3) concern expressed with delay in making timely deposits and current monthly reports. Trish Clark made motion these reports be accepted after corrections, 2<sup>nd</sup> by Donna Amos; carried and reports will be filed for audit. Reports for February & March tabled until April meeting.

Nominating Committee: Chair, Ann Huddleston, CPIW, advised current officers have agreed to continue, and thanked the following committee members for their assistance: Chris Nichols, Mary Collier, Margaret Wilson, Melissa Maddox. Members will vote on slate of officers at the April meeting, with installation in May, terms begin July 1. Proposed 2008-2009 officers:

President	Jessica M. Mason, CPCU, AIS, CPIW
President Elect	Sandra W. Bowling, AAI, ARM, CPIW, DAE
Vice President	Julie Harrell, CPIW
Treasurer	Sonya David, CIC
Secretary	Teresa Sloan, CPIW

Donna Amos, AAI, CPIW, ACSR, API, DAE, reiterated to the members our organization is the only VA group with the succession goal of officers, and it reflects positively on our organization.

**New Member Orientation:** Jessica Mason presented Melissa Maddox and Melanie Hedgepath with new member packets obtained from NAIW website. Included in the packets is the Member Achievement Record. This form will be placed on our website for member's use in keeping track of their various activities.

**Regional Conference:** Jessica Mason reported on the recent Regional Conference held in Raleigh NC first of the month. There were 6 representatives from Roanoke. Proposed by-laws revision to increase dues, Region II passed with 18 yes/11 no vote. If this revision passes the majority of all Regions, it will then go to National. The theme of both keynote speakers was Gen Y, how to recruit and keep these individuals. Linda Wilson, National Representative's report from National was in a FAQ's format. She had to field many tough questions regarding recent events at National and some poor management decisions, and did so very openly, honestly, and professionally; which was greatly appreciated by all members present. Teresa Sheppard is the incoming Region II Vice President. She gave each delegate the NAIW Tool Box which contains everything needed to be successful. After placing the new members names in a hat, Jessica drew Melanie Hedgepath and presented her with the Tool Box.

**2008 State Meeting Report:** Trish Clark advised she and Marcia had met with Holiday Inn Tanglewood prior to the meeting, and they have presented a very favorable package. Meeting date September 26-27, 2008. IPR will take this opportunity to plan 2 CE classes on Friday morning, for the benefit of IPR, prior to the CE classes provided by State. The welcome party theme will be 50's-60's Sock Hop; will hold a silent auction to raise funds for future conferences. Registration will be \$90 and room rate approximately \$80.

**Public Relations:** It was agreed we will hold a meeting and prepare the meal for that day at Ronald McDonald house once a year, trying for March to avoid possible inclement weather.


**Rookie of Year and Professional of Year:** Jessica Mason will email these forms to the members, and Freda Horn will coordinate again this year.

**50/50:** \$8.00 total collected; won by Trish Clark.

Jessica Mason presented a picture from our 2007 Christmas party to Marcia Barber as a token of our appreciation. Marcia had joined us for our Christmas event.

Being no further business, meeting adjourned 7:25 pm.

Respectfully submitted,

  
Sandra W. Bowling, AAI, ARM, CPIW, DAE  
President Elect

# COMMITTEE REPORTS

**GIFTS & FLOWERS – No report**

**Legislative: No Report**

**EDUCATION –No Report at this time.**

*Donna W. Amos, AAI, CPIW, ACSR, API, DAE*

**MEMBERSHIP –**

**Melissa Maddox's application has been mailed to National. She should be receiving her membership certificate soon.**

**Julie Harrell – CPIW - Chair**

**WAYS & MEANS - Nascar!**

**SELL, SELL, SELL THOSE NASCAR TICKETS! Drawing at our April 17<sup>th</sup> meeting.**

**Chris Nichols, Nascar Chair**

**SCHOLARSHIP COMMITTEE**

**Evan Graham – 2007 Fall/Va. Western Community College 3.077 GPA**

**Report from Jon Burch (Jon hasn't sent his grades yet, but here is the last communiqué I received from him)**

China was a blast, but it's great to be back. I learned an incredible amount from China about the culture, the language and international finance. Along with living with a Chinese family, I got to travel around the country a little bit and see some amazing landscapes and interesting people – (3,000 pictures worth). So I'm back to William & Mary and loading up on finance, Chinese and economic classes. The Global Education office of WM tells me the transfer credit/grades will not be available until mid February. I will send them to you as soon as I get them. Thanks again! Jon

**Cindy Friesland – Chair**

# NOMINATING COMMITTEE


The Nominating Committee of the INSURANCE PROFESSIONALS OF ROANOKE submits the following slate of officers for the year July 1, 2008 to July 1, 2009:

PRESIDENT	Jessica W. Mason, CPCU, AIS, CPIW
PRESIDENT ELECT	Sandra W. Bowling, ARM, AAI, CPIW, DAE
VICE PRESIDENT	Julie Harrell, CPIW
TREASURER	Sonya David, CIC
SECRETARY	Teresa Sloan, <i>CPIW, AIS</i>
IMMEDIATE PAST PRESIDENT	Trish Clark, ACSR, CPIW, DAE

Election of Officers will be April 17, 2008.

## NOMINATING COMMITTEE:

Chris Nichols, CPCU, CIC, CPIW  
Margaret Byrd Wilson, CIC, CPIW, ACSR, DAE  
Mary Collier  
melissa Maddox

  
\_\_\_\_\_  
Ann R. Huddleston, CPIW  
Chairperson

## **REGION II CONFERENCE REPORT**

Thank you for sending me as your representative to the 2008 Region II Conference in Raleigh. The Raleigh association did a great job hosting Region II.

The delegates were asked to vote on a proposed by law amendment to increase the National annual dues for the 2008-2009 year to \$86.50 for an active member belonging to a local association, an increase of \$11. The member-at-large, retired member, student member, and retired lifetime member annual dues increases were also part of this amendment. There was much discussion related to this issue. The bylaw amendment passed Region II with 18 (y) and 11 (n). I voted no.

Each year, National annual dues are increased according to the Consumer Price Index.

The amendment is currently being voted on at each of the regional conferences and if it passes each region by a majority vote, will be voted on at the National convention in June.

In addition to voting on this important issue, we were privileged to hear two wonderful speakers who both spoke on the topic of Generation Y, and the current issues facing employers and organizations in attracting, recruiting, and retaining the members of this generation.

Linda Wilson, NAIW International Vice President, attended the conference and presented a summary of some of the most frequently asked questions they have been receiving from members over the past year, and answered those questions in her presentation to us. She offered a lot of good information.

Teresa Shepherd was elected as Region II Vice President for the 2008-2009 year. In her post-election remarks, she shared some of her ideas for the coming year.

*Jessica*

President

Jessica Mason, CPCU, AIS, CPIW

Insurance Professionals of Roanoke

# Announcements

From One Beacon Insurance Company:

We currently have an opening in the Small Business Service Center for an Account Specialist. If you have any questions or would like additional information, please contact Linda Huffman (540-378-1745) or Donna Fizer (Human Resources 540-378-1771). Thank you.

## Small Business Account Specialist

**Job Requisition Number:** 29002

**Job Title:** Small Business Account Specialist

**Employment Status:** FR-Full-Time

**Business Unit:** 73 - CL - Small Business

**Job Description:** OneBeacon uniquely blends a 170 year history and strong financial backing with an opportunistic and fast-paced culture. Our "think like owners" mindset is reinforced through true pay for performance featuring an ESOP, incentive plans and competitive pay and benefits. You'll find that we're an entrepreneurial company that just happens to be in the insurance industry.

OneBeacon Insurance Group offers a range of specialty and segmented commercial and personal insurance products sold primarily through select independent agents. As one of the oldest property and casualty insurers in the United States, OneBeacon traces its roots to 1831 and the Potomac Fire Insurance Company. Today, OneBeacon's specialty insurance products are available countrywide, and commercial and personal lines are offered in select geographic territories. OneBeacon's principal business office is in Canton, Massachusetts. The Company is publicly traded on the New York Stock Exchange under the symbol "OB".

We currently have an opening for a Commercial Lines Small Business Account Specialist in our Salem, VA office.

This position functions as an extension of select OneBeacon Small Business agents serving as a primary resource for insureds.

Responsibilities include handling phone calls and e-mails from insureds and agents; assisting insureds with billing inquiries, requests for policy changes, requests for certificates of insurance and coverage verification; renewal issuance, including risk control analysis.

### Requirements:

High school diploma; Associates Degree preferred; completed INS 21, 22, & 23 or CPCU equivalent; 3-5 years customer service and P & C commercial insurance experience; must have proven analytical, decision-making problem-solving communication & customer service skills; Agency License.

**Location:** 1051 Texas Street Salem, VA-Virginia 24153-0000 United States

Carole C. Thorne  
OneBeacon Insurance  
540-378-1701  
FAX: 540-378-1795

## Announcements - Continued

"Thank You" note from our State Director – Marcia Barber

Dear Friends,

Thank you for allowing me to speak at your March meeting. It is always a treat to be with my friends in Roanoke. Thank you for the picture of all of you - you have a very special place on my shelf and in my heart!!

I can't even begin to express my thanks for hosting the Council meeting AND helping with the 2010 Regional Conference. We are going to have a great meeting and Conference!! Love ya,  
Marcia

**Please mark your calendars –**

What? **4<sup>th</sup> Annual Virginia Council of NAIW Industry Week Event**

When? **Tuesday, May 20, 2008**  
9:45 am to 3:00 pm

Where? **PIA of VA/DC office in Richmond, VA (at their NEW location!)**

Cost? \$20 for lunch; **4 hours of FREE CE to all Virginia Council of NAIW members!**  
Non-members are welcome to attend for a fee of \$10 per CE hour plus lunch.

A reservation flyer will be coming out soon. Please pass the word on to your local association members and other insurance industry persons interested in CE credits.

I hope to see many of you at this event!

Annette Lynn Ardler, CP, CPIW  
Public Relations Chair  
Virginia Council of NAIW

**HAPPY BIRTHDAY**



## **April Birthdays**

**04/07 – Angelina Rubenzer**

**04/19 – Margaret Wilson**

**04/26 – Cindy Friesland**