Insurance Transformation

Are You Ready?

SPONSORED BY CPCU SOCIETY

Friday, October 30, 2015

2015 Insurance Festival
65th Annual Celebration of Insurance Education
Welcome from the President

Welcome to the 65th celebration of insurance education in Kansas City. The Kansas City Chapter of the CPCU Society is proud to provide you with a tremendous day of educational content presented by top-notch insurance professionals.

The theme of this year’s event is “Insurance Transformation: Are You Ready?” In some ways, this is a continuation of last year’s festival as we are continuing to explore the hottest topics of the day. Our speakers will cover many emerging issues challenging the insurance industry. Their expertise will enable you to meet these unique challenges involving technological and other change.

Congratulations to the 2015 new designees! A big part of our day is honoring the 2015 CPCU designees through conferment. Congratulations to each of you who achieved the CPCU designation over the past year. We all know how much time and work goes into this accomplishment. You should be proud of your achievement. We hope all of you will become active in the Kansas City Chapter and continue your professional development. A full list all the new CPCUs is in the program. Please take a moment to congratulate the new designees as you see them.

Thanks to each of our Speakers, Company Sponsors and Exhibitors. We greatly appreciate your contributions. This event would not be possible without your support. Each is listed in our program and on projection screens in the banquet room. Please give them a thank you for their support. Thank you to Ron Hamilton and his Planning Committee for working over the past months to put together such an excellent program. Please thank the committee members for the many hours they have invested.

Once again, we have an additional networking opportunity at the end of the day. It is our hope that attendees will spend a few minutes after the formal education is completed to meet with other leaders in the insurance community. Like any other festival you will be exposed to a diverse group of individuals and companies that will help you better understand the insurance industry and the importance of risk management to area businesses.

Please join us! The Kansas City Chapter of CPCU has been recognized as one of the finest CPCU Chapters in the country. It regularly receives the prestigious “Gold” award from the CPCU Society for its work. We’d love to see you get involved. Working on chapter committees or as an officer provides a wonderful opportunity to showcase your leadership talents.

Finally, thank you for joining us. We hope you enjoy the day of education and networking with your fellow insurance professionals. Please let us know if you have any suggestions for improvements that could be made to this event in the future.

Aaron Brandenburg
President CPCU-KC
Program

8:00 - 8:45  Registration, Continental Breakfast and Visit Exhibitors

8:45 – 9:00  Welcome & Introductions
Aaron Brandenburg, CPCU – President, Kansas City CPCU Society Chapter
Jane Wahl, CPCU, CLU, FLMI - President and Chair, CPCU Society Leadership Council

9:00 – 10:00  GO! Find and Pursue your Passionate Purpose
Gregory B. Knapp, Speaker, Talk Show Host, and Author

10:00 – 10:15  Break/Visit Exhibitors

10:15 – 11:15  Today's Economy: The Sharing Economy Session
Jeff DeTurris, CPCU - Insurance Services Office Inc. (ISO)

11:15 – 11:30  Break/Visit Exhibitors

11:30 – 1:00  Lunch
Conferment
Aaron Brandenburg, CPCU – President, Kansas City CPCU Society Chapter
Dennis Holler, CPCU – Regional Governor, CPCU Society
Jane Wahl, CPCU, CLU, FLMI - President and Chair, CPCU Society Leadership Council

Keynote Address – “Cyber & Financial Risk”
Jeff Lanza, Retired FBI Agent - The Lanza Group

1:00 – 1:15  Break/Visit Exhibitors

Tim Burke - IMA
Ken Selzer, CPCU, CPA - Kansas Insurance Commissioner
Jane Wahl, CPCU, CLU, FLMI - President and Chair, CPCU Society Leadership Council

2:15 - 2:30  Special Recognitions
Ron C. Hamilton, CPCU – President Elect, Kansas City CPCU Society Chapter

2:30 - 4:00  Networking Reception
Coach’s Bar & Grill
Tim Burke

Tim joined IMA in 2015 to start a dedicated Cyber Risk practice. His mission is to provide a financial backstop for companies of all sizes against data theft, reputational damage and revenue impacts caused by digital attacks. He counsels clients on this new area of risk where all commercial enterprises are vulnerable. As the practice leader he is in charge of researching emerging issues and creating proprietary solutions. Areas of focus include creation of custom policies based on industry segment, loss control solutions and fostering partnerships with service providers.

Tim has 20 years of insurance experience – 15 of which were specific to technology E&O and Cyber Risk. He started his focus in this area at AIG at the time of the launch of the first cyber insurance policy in 1999. Over the past twelve years Tim has worked at the two largest international brokers with a portfolio comprised of Fortune 1000 companies. He most recently served as the West Zone E&O and Cyber practice leader for Marsh USA. Several of Tim’s clients have been the victim of high profile data breaches. Based on those experiences, Tim has a unique perspective on both the necessity of coverage and how it should be designed. He has presented on the topic of cyber risk at national conferences and is a member of the InfraGard Denver Members Alliance.

Tim has a BA from the University of Kansas and a MBA from the University of Denver. He resides in Denver, Colorado where his free time is spent with his three young children and beautiful wife.
Jeff DeTurris is the Vice President - Coverage Products and Operations at ISO. He has been with ISO for 34 years, and has responsibility for the development and maintenance of coverage forms and related manual rules for Personal Auto, Homeowners and the various personal lines of business, as well as Commercial Auto, Farm and Business-owners. During his career at ISO, Jeff has managed the development and implementation of various new insurance programs, including the motorcycle program, the watercraft program and the nonstandard personal auto policy. He also coordinated ISO’s emerging issues initiative for over ten years, which includes the identification and study of emerging risks and hazards, and their potential insurance implications for all lines of business. Jeff holds the Chartered Property Casualty Underwriter (CPCU) designation.
Greg Knapp
Author, Speaker, Trainer, Radio Talk Show Host

Greg's new book, Go! How to Find and Pursue Your Passionate Purpose, is for everyone who feels trapped earning a living instead of making a life. It's for people who have lost the passion they used to have. It's for people who know there's something more for them, but they're not sure how to get it.

Greg spent a lot of his youth drifting from job to job trying to find his purpose. He literally dug ditches, worked construction, waited tables, taught climbing and rappelling techniques, and worked as a felony probation and parole officer.

He then used his MA in counseling psychology to work as an in-home counselor and behavioral specialist for children and their families. During those years he developed a love for talk radio.

He set a goal and went from having no training or experience in broadcasting, to becoming a nationally syndicated talk show host in just nine years.

Greg now hosts a talk show on KCMO 710AM and 103.7FM. The Greg Knapp Experience airs weekdays from 4-6pm.

He has given his expert opinion as a guest on CNN, Fox News Channel, CNBC’s Power Lunch, and CNBC Reports.

Greg speaks to a wide variety of organizations on the topics of:
• Finding and pursuing your passionate purpose
• Goal setting and achievement
• Mindset
• Focus
• Talent and Luck – not needed and not what you think
• How to stay motivated

His desire is to inspire people to find and pursue their Passionate Purpose with all they have so they can live out extraordinary lives that will change the world.

gregorybknapp@gmail.com
gregorybknapp.com
Jeff Lanza

Jeff was chosen the best speaker in the 50 year history of Kansas City’s prestigious Plaza Club. He is a professional speaker who has provided over one thousand presentations on the topics of leadership integrity, crisis communication, ethics, identity theft, cyber-crime and more. His clients include Morgan Stanley Smith Barney, Nationwide, Citigroup, The Young Presidents Organization, American Century, Hallmark, H & R Block, The Society of Human Resource Management, Edward Jones, Standard and Poors, Oppenheimer, U.S. Bank, Wells Fargo and others. He developed and presented a program on identity theft prevention which was used to educate a nationwide audience of Citigroup employees. His program on the topic of leadership integrity has been certified for education credits across the United States. He recently provided this program as part of ethics training for a nationwide sales force for Pacific Life Insurance Company. The program was used to educate the Kansas City Chapter of the National Association of Corporate Directors.

Jeff was head of operations security for the Kansas City FBI and is an FBI certified instructor. He has trained numerous government agencies and corporate clients on how to handle the media tricks that the national television personalities such as Connie Chung and Chris Hansen used on him during his nearly two decades as a crisis communicator with the FBI.

In addition to his latest book, “Pistols to Press”, which has received fabulous reviews from national media personalities, Jeff has been published in The Kansas City Star, Ingram’s Magazine and on the FBI National Web site.

Jeff consulted for academy award winning director Ang Lee during the production of “Ride with the Devil”, and he has provided regular consulting services for television and movie production in Hollywood at Steele Films and Granfalloon Productions.

Prior to his career as an FBI agent, Jeff was employed by Xerox Corporation as a Computer Systems Analyst. He has an undergraduate degree in Criminal Justice from the University of New Haven (Connecticut) and a Masters Degree in Business Administration from the University of Texas.
Ken Selzer, Certified Public Accountant, served as Executive Managing Director for Aon Benfield and has extensive experience in the reinsurance and reinsurance brokerage industries. He has worked as a Certified Public Accountant with a major accounting firm, and together with his wife Deb owned a successful small business for 12 years.

After growing up on a family farm in central Kansas near Goessel in Marion County, Ken graduated with honors from Kansas State University with a Bachelor of Science in Accounting. He later obtained a Master’s in Business Administration from the University of Southern California.

In addition to his credentials as a Certified Public Accountant, Ken has earned a number of professional designations in the insurance and reinsurance industry.

Ken Selzer is active in many professional, community, and charitable organizations, including the:
- Kansas Society of Certified Public Accountants,
- Heart of America Chapter of the Cystic Fibrosis Foundation,
- Rotary, and
- Johnson County Christmas Bureau.

He has served as a Councilman and Council President in Fairway, Kansas, and currently is the Chair of the Board of Trustees of the Educational Foundation of the Kansas Society of Certified Public Accountants. Selzer has been named to the Dean’s Advisory Council for the College of Business at Kansas State University. He has served as a mentor to students at Kansas State University and at the University of Southern California.

Ken Selzer and his wife Deb provide scholarships for graduating seniors in the Goessel School District (Marion County), as well as support scholarship programs at Kansas State University. They are also supporters of innovative teaching practices in several school districts, including the Louisburg School District. Ken and Deb also developed and sponsor the Innovative Teacher Award in the Blue Valley School District.

As a 4th generation Kansan, Ken grew up in McPherson and Marion Counties in central Kansas. He has been married 34 years to Deb from rural Miami County, Kansas. They live in Leawood and have two daughters, one a University of Kansas graduate and one currently attending Kansas State University.
Jane M. Wahl, CPCU, CSSBB, CMQ/OE, CLU, CQIA, FLMI is a process manager in State Farm’s Jacksonville, Florida office. Wahl earned her CPCU designation in 1992. She also holds the CLU, FMLI, CMQ-OE, and CQIA designations and is an ASQ Six Sigma Black Belt. She has served as a Society Governor as well as a member of the Budget and Finance Committee, various task forces and in chapter leadership. A Jacksonville native, she served as a chairman of the Duval County’s PreDisaster Mitigation program for ten years and is a founding member of the Federal Alliance for Safe Homes. Wahl also serves on the Board of the University of Florida’s Smathers Library.
CPCU Officers

Kansas City Chapter Officers, Directors and Committee Chairs
Aaron Brandenburg......... President
Ron C. Hamilton .......... President Elect
Claire Miller................. Vice President
Alana Artzer ................. Secretary/Treasurer
Tasha Barbour ............... Immediate Past President
Linda Minson ................. Director, Public Relations/Visibility
Stacy Gardner ............... Director, Membership Chair
Tim Mullen .................. Education Chair/Candidate Development
David Keleher ............... Director
Bill West ..................... Webmaster
Marc Frink .................. Social Media Chair/Webmaster
Joan Dostal .................. Executive Director
Joe Bieniek ................. Interest Group Committee Chair
Dennis Junge ................ Good Works/Community Service Chair
Eric Nordman .............. Research Committee Chair
Dennis Holler ............... Governor, Society

Chapter Champions

Mark D. Mollus ............ American Family Group
John A. Van De Voort ..... Berkley Fire and Marine
Linda R. Minson .......... Cretcher Heartland Inc.
Sonja R. Mooberry ....... EMC Insurance Companies
William C. West ............ Federated Rural Electric Insurance
Joseph F. Bieniek .......... First Consulting & Administration, Inc.
Jan D. Martin, Ed.D ........ Haake Companies
Terrilyn Obrock ........... Lockton Companies Inc
Sheryl Jean Manger ....... Marsh Inc
Eric Charles Nordman .... NAIC
Dennis R. Junge .......... Zurich
CPCU Past Presidents

13-14 Tasha Barbour 83-84 Burton A. Selfridge
12-13 Dennis Holler 82-83 Thomas S. Case
11-12 Carl Dodson 81-82 George L. Cartlich, III
10-11 John Van de Voort 80-81 Walter John Tegeler
09-10 Dave Keleher 79-80 Turner Lett
08-09 Bill West 78-79 Fred W. Lamar
07-08 Eric Nordman 77-78 Robert L. Epperson
06-07 Dennis Junge 76-77 Bert C. Faherty
05-06 Duane Soper 75-76 Roger J. Freeman
04-05 Bryan Fuller 74-75 John F. O’Reilly
03-04 Rick Manfredi 73-74 William M. Chick
02-03 Terrilynn Obrock 72-73 George A. Hallinan
01-02 Jerry Thompson 71-72 Bernard A. Schaefer
00-01 David A. Lewis 70-71 H. Alan Coleman
99-00 Cary Phillips 69-70 H. Gregory Neybert
98-99 Lee Tenold 68-69 Neil Helbling
97-98 Linda Belinke 67-68 James R. Garr, Jr.
96-97 Gary Schultz 66-67 John S. Pelot
95-96 Terri Taylor 65-66 Roger W. Penner
94-95 G. Mac Humphries 64-65 F. Kenneth Riley
93-94 Ben Worth 63-64 Robert A. Koenigsdorf
92-93 Paul Longman 62-63 Robert Franklin
91-92 Linda Minson 61-62 William F. Seitz
90-91 Edwin T. Dexter 60-61 F. Lee Beets
89-90 David Loritz 59-60 Lindsay Fisher
88-89 Linda Cholak 58-59 Jerome R. Churchman
87-88 W. Robert Leigh 57-58 John B. Owen
86-87 Brent G. Hodges 56-57 Percy S. Lorie
85-86 Patricia Casey (Hermesch) 55-56 Robert E. Morgenthaler
84-85 David E. Fortune 54-55 William J. Mitchell
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<td>Tori M Tally</td>
<td>AIG Property &amp; Casualty</td>
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<td>Robert Wooldridge</td>
<td>ARA Insurance Services</td>
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**CPCU Society Member Benefits**

As a member of the CPCU Society, the risk management and property-casualty insurance industry’s premier professional association, you gain relevant, technical knowledge you need to further your career and professional success, including:

**Networking Opportunities**
- Connect with more than 20,000 CPCUs in 130 chapters and more than 40 countries
- Join your chapter to network with local insurance professionals and participate in regional programs
- Gain technical knowledge specific to your job function through the Society’s 14 specialized interest groups
- Attend Society workshops and events, including the CPCU Society Annual Meeting, at a discounted rate
- Access the Society’s online job database to seek new career options or search for qualified job candidates
- Join The Institutes Community where you can learn from, network and share knowledge with other CPCUs

**Complimentary Webinars and Publications**
- Attend more than 30 webinars a year covering industry topics and trends, such as ethics and cyber risk
- Access over 100 on-demand technical insurance and risk management webinars
- Gain knowledge on current industry trends through Insights, a professional journal by the CPCU Society
- Stay up-to-date on member and chapter news through online access to the CPCU Society News

**Complimentary and Discounted Institutes and CEU Resources**
- Access one select, complimentary Institutes online course on a quarterly basis
- Enjoy unlimited, free access to The Institutes’ 10 online CPCU courses, covering more than 1,000 topics
- Take advantage of a 25% discount on all Institutes study materials
- Enjoy a 35% discount on all online insurance CE from CEU, powered by The Institutes

**Volunteer and Leadership Opportunities**
- Lead and volunteer at all levels of the CPCU Society through its committees and task forces
- Share your knowledge and expertise through mentorship opportunities with your local chapter

*Discounted Institutes and CEU materials including unlimited online CPCU courses, and complimentary courses are available to Full, Retired, Lifetime Retired, and New Designee Members only.*
The CPCU Society and The Institutes have created the joint Continuing Professional Development (CPD) program, which recognizes professionals who keep their knowledge and their skills sharp through career enhancing activities. By participating in this advanced program, you will set yourself apart as a progressive CPCU who is committed to lifelong learning. Our CPD program is ideal for CPCUs at every career level, from recent graduates to seasoned professionals. If you are not CPD qualified, don’t wait. Just go on-line, complete the form and participate!

Congratulations to the following CPCUs who have met the requirements of the CPD program.

**CPD QUALIFIED**

Nicholas Abbick ....................... Farmers Group
Aron M. Johnson ......................... Arch Insurance Group Inc
Clifford Austin ......................... Farmers Olathe Service Ops
Joe F. Bieniek ......................... First Consulting & Administration, Inc.
Nicole M. Boyd ......................... Kansas Insurance Department
Rebecca S. Bredehoef .................. Zurich Insurance Group
Kenneth Capps ......................... Farmers Group
Teresa J. Cooper ....................... Nat’l Assoc of Ins Commiss
Marcia Dietrich ......................... Armed Forces Insurance
Garrett Drake ......................... Liberty Mutual
Christopher Flamand ................. Liberty Mutual
Dawn A. Franta ......................... Federated Rural Electric Insurance Exchange
Robert M. Frink ....................... Kansas Farm Bureau
Stacy Gardner ......................... Arch Insurance Group Inc
Camden P. Geiger ...................... Lockton Companies
Erik P. Hage ......................... Lockton Companies
Erik W. Hansey ......................... CBIZ Benefits & Insurance Serv
Doran Hayter ......................... American Family Mutual Ins Co
Julie A. Hertel ......................... American Family Insurance
Dennis I. Holler ...................... Munich Reinsurance America Inc
CPD QUALIFIED (Continued)

Marjorie J. Hughes .................... Lockton Companies
J. Caleb Hulse ................................ RLI Insurance Company
Celine Johnson ............................. Farmers Olathe Service Ops
Rose Kasper ...............................
Regina Kepple ............................ Zurich Insurance Group
Kinkade Kyle ............................. Zurich Financial Services Grp
Michael J. Marx ........................ Lockton Companies
Keith McDaniel ........................ American Family Mutual Ins. Co
Patrick W. McNamara .................. Lockton Companies
Aaron Bradley Meek .................... Shelter Insurance Companies
Daniel C. Mesaros ...................... Farmers Group
Diane M Meyers .......................... YRC Worldwide Inc.
Jason Ryan Miles ........................ Lockton Companies
Catherine Claire Miller ................. First Consulting & Administration, Inc.
Linda R. Minson ......................... Cretcher Heartland Inc.
Bradley J. Moody ........................ Cline Wood Agency
Karrie Noble .............................. EMC Insurance Companies
Tina Olson ................................. American Family Mutual Ins. Co
Douglas E. Paden ........................ Cameron Insurance Companies
John M. Radford .......................... State Farm
Todd Rambo .............................. Farmers Group Location Not Lis
Jesse L Rhoads ........................... Farm Bureau Mutual Ins. Co
Kathryn A Richardson ................. Arch Insurance Group Inc.
Douglas J. Rogge ......................... Kansas Farm Bureau
Kathryn L. Sergeant .................... Lockton Companies
Samantha R. Serum ..................... Lockton Companies
Justin P. Shrader ........................ Lockton Companies
Steven Sopyla ............................ Sopyla & Associates LLC.
Ashleigh L. Sterr ......................... Lockton Companies
Tori M Tally .............................. AIG Property & Casualty
Jeff A. Tennis ............................ Lockton Companies
Lee E. Tenold ............................. IMA
Karolyn Verde ......................... Armed Forces Insurance
Betty Lee Weeks ......................... Swiss Re
Robert Wooldridge ...................... ARA Insurance Services
CPCU Society Interest Groups

Agent & Broker Interest Group promotes discussion of agency/brokerage issues related to production, marketing, management and effective business practices.

Claims Interest Group promotes discussion of enhancing skills, increasing consumer understanding and identifying best claims settlement tools.

Coverage, Litigators, Educators & Witnesses Interest Group promotes discussion of professional practice guidelines and excellent practice management techniques.

Excess/Surplus/Specialty Lines Interest Group promotes discussion of the changes and subtleties of the specialty and non-admitted insurance marketplace.

Information Technology Interest Group promotes discussion of the insurance industry’s increasing use of technology and what’s new in the technology sector.

International Insurance Interest Group promotes discussion of emerging business practices of today’s global risk management and insurance communities.

Leadership & Managerial Excellence Interest Group promotes discussion of applying the practices of continuous improvement and total quality to insurance services.

Loss Control Interest Group promotes discussion of innovative techniques, applications and legislation relating to loss control issues.

Personal Lines Interest Group promotes discussion of personal risk management, underwriting and marketing tools and practices.

Regulatory & Legislative Interest Group promotes a healthy discussion and dialog on the rapidly evolving federal and state regulatory insurance arena. In a regulated industry where “compliance matters,” the interest group provides information and insight on the laws and regulations affecting the business of insurance.

Reinsurance Interest Group promotes discussion of critical issues facing reinsurers in today’s challenging global marketplace.

Professional Experience Resource Group is a resource for CPCUs by mentoring and coaching. Encourages a spirit of fellowship and community through networking.

Risk Management Interest Group promotes discussion of risk management for all CPCUs, whether or not a risk manager.

Underwriting Interest Group promotes discussion of improving the underwriting process via sound risk selection theory and practice.
Insurance

Education

Insurance Education Support
The CPCU Society was chartered to foster the education of persons interested in pursuing careers in insurance. With the loss of “baby boomers” from the industry and increased regulatory demands, insurance education has never been more critical.

The Kansas City CPCU Chapter provides traditional classroom education to interested students.

This semester CPCU 540, Finance and Accounting for Insurance Professionals, is being offered at Zurich Insurance Company.

For more information about classes being offered in the Kansas City metropolitan area or to request a class or seminar to be held at your company, contact:

Tim Mullen – Education Committee Chairman at: tmullen@naic.org

Percy S. Lorie Scholarship
The Percy S. Lorie Scholarship is sponsored by the Kansas City Chapter of CPCU and is intended to foster insurance education at the college level. Two scholarships are awarded annually. To be eligible, the student must have completed at least 60 hours of college level classes, major in insurance, or an insurance related field of study and have insurance specific work experience.

Percy S. Lorie started his career as an insurance agent in Kansas City, MO. He was one of the early completers of the CPCU curriculum, having attained his designation in 1952. Mr. Lorie is most remembered for helping form the Kansas City CPCU Chapter and in playing an instrumental part in the chapter’s continuing education activities. For many years he was responsible for administering and teaching insurance courses in the Kansas City area. From these early beginnings, the chapter’s education program has grown and prospered.

Thousands of insurance professionals in the Kansas City area have benefitted from Mr. Lorie’s work. He had a life-long commitment to share his knowledge and encourage others in their studies. In honor of his visionary work in insurance education, the Kansas City Chapter of CPCU established the Percy S. Lorie Scholarship in 1994.

For more information contact:

Kansas City Chapter of CPCU
kansascitycpcu@everestkc.net
2015 Planning Committee

Ron C. Hamilton, Chair
Alana Artzer
Tasha Barbour
Joe Bieniek
Aaron Brandenburg
Joan Dostal
Marc Frink
Stacy Gardner
Susan Gaughan
Dennis Holler
Dennis Junge
Brenda Karlin
David Keleher
Claire Miller
Linda Minson
Eric Nordman

You are cordially invited

Networking Reception
2:30-4:00 p.m.
Coach's Bar & Grill
(Adjacent to the Ritz Charles)

Complimentary Food & Drinks
Provided by...
For More Information
on the Kansas City Chapter, please visit our website
where you will find information on past events,
future events, and how to follow us on
Twitter, Facebook and LinkedIn.

kansascity.cpcusociety.org