



Chartered Property Casualty Underwriters

# CHAPTERGRAM

## Dallas Chapter January, 2007

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Dallas Chapter of CPCU  
10455 N. Central Expressway  
Suite 109-351  
Dallas, TX 75231  
[www.dallascpcu.org](http://www.dallascpcu.org)

## *Dallas Chapter Luncheon*

*Doubletree Dallas Hotel  
Midway & LBJ Freeway*

*Registration-11:15am  
Luncheon-11:30am  
January 16, 2007  
Cost \$20.00*

### January Meeting and Luncheon

Please join us on January 16th as David Margulies of The Margulies Communications Group talks about the power of proper communication. The Margulies Communication Group is an award-winning Public Relations agency. Most recently, the firm was recognized with two Best of Texas Awards from the Texas Public Relations Association. In addition, team members have obtained accolades from journalism organizations, Chambers of Commerce, and other civic organizations for their involvement in the community.

Please RSVP to Susan Tanner at [susan.tanner@zurichna.com](mailto:susan.tanner@zurichna.com) or through the website at [www.dallascpcu.org](http://www.dallascpcu.org) by Friday, January 12th.

**[www.dallascpcu.org](http://www.dallascpcu.org)**

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Debra Richardson, CPCU, CIC, CRM  
The Hanover Insurance Group

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Zurich North America

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State Farm Insurance Company

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State Farm Insurance Company

**Past President**

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GenRe

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CRIS  
International Risk Mgmt Inst.

**Director**

Donald Bowles, CPCU, CLU  
McQueary Henry Bowles Troy

**Director**

Howard Townsend, CPCU, ARM,  
AIC  
Unitrin

President's Message

Happy 2007 to All! I trust everyone had a wonderful holiday season.

We have had some time now to reflect on our successes and "near successes" of 2006. Now we find ourselves considering our goals and objectives for 2007, and wondering how we will fit in all of the activities it will take to help us reach those goals. Although we each have different goals, we have one thing in common and that is our association with the leading organization for professional development. I encourage you to take advantage of all that the National Society of CPCU and your local Dallas Chapter CPCU have for you in the way of continuing professional development. On our websites, you can review articles written by industry leaders, find out about local and national seminars, and make networking connections with other members. Highlights from the January national website, <http://www.cpcusociety.org/>, include links to a Rough Notes article about the Society, a profile on our national president Betsey Brewer and the story of her success, and an article from the January CPCU e-Journal on "Preparing for the Pandemic Flu". On our local website, <http://www.dallascpcu.org/>, you can learn about the new CPCU class we are offering, review upcoming events, check our job placement link, and find out the latest happenings with community events and service.

However you choose to continue your professional development, I encourage you to stop first to consider what you really want out of 2007, the next three years, the next five years, and so forth. Do the activities you are doing today and the busy work support your short and long term goals? Are you working on those things that are truly "important", or putting out fires for the "urgent"? Our time is valuable, and we should ask ourselves if we are getting paid for the majority of activities in which we engage.

We all know the saying "Work smarter - not harder". Let's use 2007 as the year in which we adopt this philosophy, and use the offerings from your CPCU connections to help make this philosophy a reality.

Best wishes to all,  
Debra Richardson, CPCU, CIC, CRM  
President, Dallas Chapter CPCU

# Save the following dates ...

## February 20, 2007

11:30 am Luncheon – Doubletree – Honoring Chapter Past Presidents

## March 20, 2007

11:30 am Luncheon - Doubletree - Ethics Awareness

## April 9, 2007

Chapter Charity Golf Tournament - Castle Hills Golf Club

## May 15, 2007

11:30 am Luncheon – Doubletree

CPCU Director and Officer Election

## June 19, 2007

11:30 am Luncheon – Doubletree

CPCU Director and Officer Installation

# Remember to pay your annual CPCU Society dues.

## Committee Chairs

All Industry Day  
Rob Olson  
Susan Tanner

Circle of Excellence  
Ed Wells

New Designee & Candidate  
Development  
Bob Gulino

Chaptergram Design  
Tracey L. Weston

Webmaster  
Sharon Lindsey

Education & Scholarship  
Dee Weister

Chapter Section Liaison  
Claims -Howard Townsend  
Chapter-Jane Damon

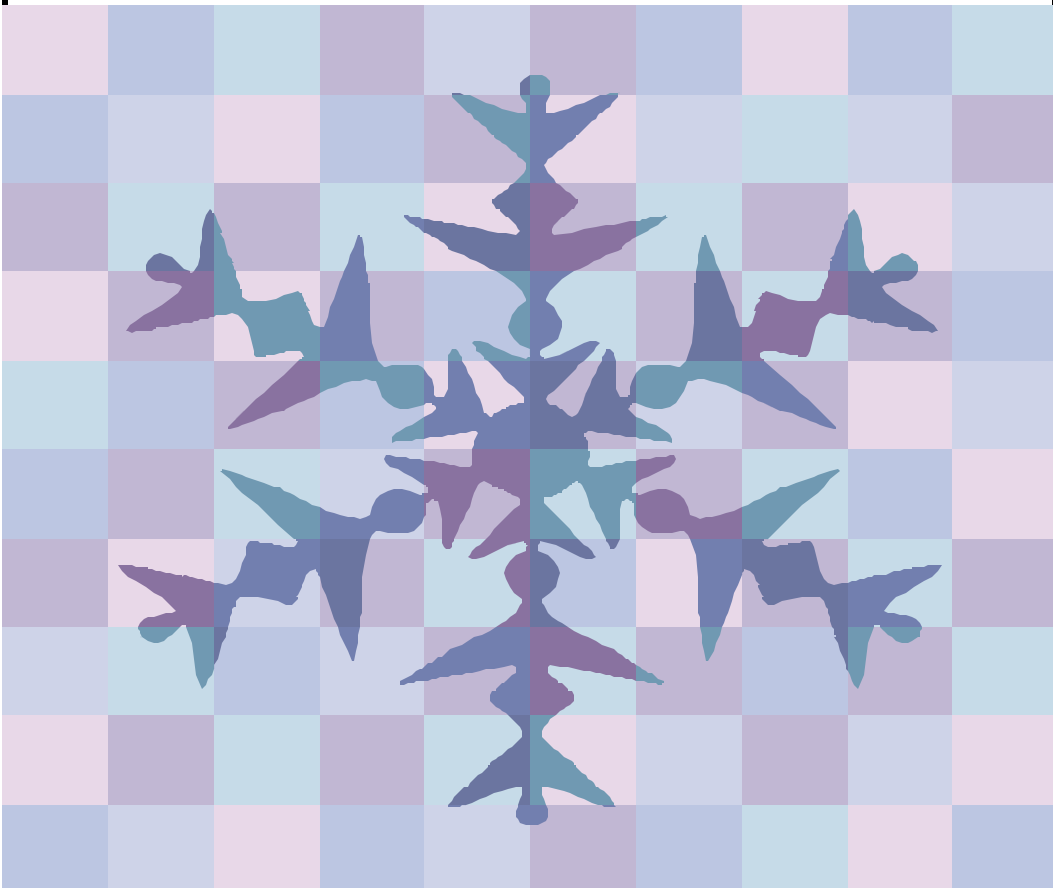
Ethics  
Ed Wells

Career Development  
Ray Loehr

Law & History  
Maureen McLendon

Community Involvement  
Ivan Bullock

Golf Committee  
Keith Thompson  
Mike Hughes



**Good Works Committee**

**Upcoming Projects**

In 2002, the Boys & Girls Club of Greater Dallas launched a new math education program for Club members in Grades 3 through 5. Using a curriculum designed by specialists with the Dallas ISD and Texas A&M University, the three month "MathBlazers" program works to enhance math skill levels of participants, culminating in a year-end inter-Club "College Bowl" style tournament.

National studies continue to confirm that significant percentages of high school dropouts succumb to gangs, drugs/alcohol and criminal activity. In contrast, there is strong evidence of a correlation between math skill levels and the rate of high school and college graduation. Other, less obvious benefits include positive impacts on non-math grade performance, crime and drug/alcohol-oriented statistics (along with their related insurance costs), increases in the tax base from engaged and productive community members, and highly sought after additions to the skilled labor force. In it's four year run, MathBlazers has achieved stunning results in student academic performance, motivation and future outlook.

Ivan Bullock, Good Works Committee Chair, is meeting with the Club's representative to see how our Chapter can help. Watch for more news about this. Our thanks to Debra Hale and Joan Fitzsimmons for volunteering their time to Good Works!

**Career Development/Job Placement**

The scope of this position has evolved over the years from assisting unemployed Chapter members to including those without the CPCU designation seeking employment within the Property/Casualty Insurance Sector. As we are a non-profit organization and don't charge for assisting in job placement, this evolution provides a cost-beneficial service to our Chapter members.

I see no reason to change the scope of the position at the current time. To ensure the process is effective, positions will be posted if the candidate information meets the following criteria:

1. Received in Word format allowing the information to be edited, cut and pasted.
2. The candidate is seeking employment within the Property/Casualty insurance sector.

Specific information is received from the candidate allowing a brief but clear description of skills and experience.

No individuals will be identified in the Chaptergram but a reference number will be included.. Prospective employers may call or e-mail me for the candidate's phone number. At that point, my role ceases. If it doesn't, I may be posting for myself.

Ray Loehr, CPCU, AIM  
Committee Chair

If you are not currently receiving regular notices via email from the Chapter, it is likely that we do not have your most current email address. Please forward your email address to Hilary Hoffman at [hhoffman@dallassightandsound.com](mailto:hhoffman@dallassightandsound.com) in or-

With Winter fast approaching, we could all use a little sunshine in our thoughts. What better way to look forward to Spring than to start planning for the 2007 CPCU Golf Tournament benefiting Our Friend's Place. The tournament is scheduled for April 9, 2007 at The Golf Club at Castle Hills. Last year we were able to contribute over \$5,000 to March of Dimes. The Golf Committee is looking forward to a wonderful day with lots of fun, food, golf, and networking.

**Please mark your calendars, invite your friends, clients, in-laws, outlaws, and anyone you might think would enjoy a great day in the sun.**

Joan Fitzsimmons, CPCU, CLU

Dallas Chapter CPCU  
2007 Annual Charity Golf Event  
Benefitting Our Friend's Place

Monday, April 9, 2007

The Golf Club at Castle Hills

Name: \_\_\_\_\_

E-Mail: \_\_\_\_\_

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

Registration Type:

Individual (\$125)

Player name \_\_\_\_\_

Bronze (\$400)

Player name \_\_\_\_\_

Player name \_\_\_\_\_

Player name \_\_\_\_\_

Player name \_\_\_\_\_

Silver (\$450)

Hole Sponsor Name \_\_\_\_\_

Player name \_\_\_\_\_

Player name \_\_\_\_\_

Gold (\$675; \$600 early bird, if paid by February 10, 2007)

Hole Sponsor Name \_\_\_\_\_

Player name \_\_\_\_\_

Player name \_\_\_\_\_

Player name \_\_\_\_\_

Player name \_\_\_\_\_

Taco Bar Reception Only (\$30)

Name \_\_\_\_\_

Copper (\$300-Hole Sponsor Only)

Hole Sponsor Name \_\_\_\_\_

Payment will be invoiced to name on registration January 2007.

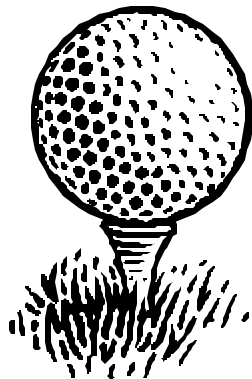
Please print, indicate sponsor/player level and return to:

Hilary Hoffman

Graham Consulting Services

P.O. Box 261204

Plano TX 75026



Dallas Chapter CPCU  
2007 Annual Charity Golf Event  
Benefitting Our Friend's Place

Date: Monday, April 9, 2007

Time: 11:30am Registration  
Noon Lunch  
1:30pm Shotgun Start  
Taco Bar after Golf

Location: The Golf Club at Castle Hills  
699 Lady of the Lake Boulevard  
Lewisville TX 75056  
972-899-7400

Individual registration - \$125; includes green fee and cart  
\$ 30; Taco Bar Reception \*\*\*for non-golfers only\*\*\*

Sponsorships

Bronze - \$400; includes 4 players  
Silver - \$450; includes 2 players and hole sponsor  
Gold - \$675; includes 4 players and hole sponsor  
Copper - \$300; Hole Sponsor Only



Early Bird Special -- \$600 Gold Sponsor,  
if paid before February 10, 2007

# **CPCU CLASS BEING OFFERED**

**The Dallas Chapter of CPCU has  
organized a study class for the  
April-June 2007 exam window:  
CPCU 520: Insurance Operations,  
Regulation and Statutory Accounting**

Meet every Monday

January 22nd – May 7th

5:30 pm – 7:00 pm

\$100 fee (does not include textbooks)

Instructor: Ed Wells, CPCU, AIM, AU, API, AIS, ACS

Classes will be held at:

America First Insurance

3400 Waterview Parkway, Suite 200

Richardson, Texas 75080

(Close to 190 & Independence)

**Watch the Dallas Chapter of CPCU website  
for registration information**

**[www.dallascpcu.org](http://www.dallascpcu.org)**

**or**

**call Dee Weister, Education Chair**

**(214) 890-7302**

**[dweister@genre.com](mailto:dweister@genre.com)**

### **Celebrities Among Us**

There are not many chapters that have the honor of having a CPCU National President as a member of their Chapter, so the Dallas Chapter is especially fortunate. Not only do we have our very own Bill Sleeper who served in 1999, but also Millie Workman, immediate past president of the National CPCU Society, has just moved to Dallas and is working with IRMI.

Please extend a special welcome to Millie as she makes the transition from Tennessee, and thank both Bill and Millie for their service to the Society.

### **Thank You for Your Generosity**

Our Speaker last month was Sue Hesseltine from Our Friend's Place who described the unique role that they played in many young to teen-aged girls lives. We collected gift cards and cash to give to the girls.

There was just a short time to get the cards before the meeting, and many members were not able to attend due to other holiday commitments. That did not slow down the donations. Our incredibly generous chapter gave approximately \$350 to this organization. Thank you all for your gifts for these girls.