



*California
Council of
IAIP*

2017-2018

**CA Council Chapter
Reports**

Chapter Listing

MAL

Members at Large

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SDAIP

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SFIP

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SBAIP

South Bay Association of Insurance Professionals



Members at Large

In the words of past California State Director, A. Marie Yarbor, the MALs are in the house!

The number of Members at Large is growing, as more Associations have turned in their charters. This is bad news/good news. We hate to lose associations, but members obviously appreciate what IAIP can offer and choose to stay, as MALs.

Currently there are 41 California members at large. We all share something in common – dedication to an organization that has helped each of us to advance professionally and personally.

And we are all a little crazy, too, having bid to host the 2020 Region VII Regional Conference. This is a daunting task, considering we are located all over the state. But in the IAIP can do spirit, we got this!

We have been working hard on the 2020 Conference and are making great progress. We are very excited to host the meeting in a new area, Vancouver, Washington, at the Heathman Lodge. Kudos to Sue Zeider for recommending this gorgeous hotel. We will have more details when we confirm our bid at Regional 2019, but you can expect a beautiful setting, great food, wonderful accommodations and warm hospitality. We hope you will save the dates.

We would also like to thank our special friends from local associations in LA, Anchorage and Portland, who are helping us make this the best conference possible.

Thank you, Madame Council Director, for letting the MALs and friends share that in 2020, We Have A Vision!

Submitted on behalf of California Members at Large by Kristina Lee



Insurance Associates of Fresno

Greetings from the Central Valley and Insurance Associates of Fresno –2017/2018.

We started off the term with our members attending the 2017 IAIP Conference in Albuquerque, NM. It was a great conference and my first opportunity to attend an International Conference. We are also very proud of our member, Alison Holmes, who was awarded the International Insurance Professional of the Year award!

We continued 2017 by having the honor to host the Leadership Workshop for CA Council Director, Carol Russell. The workshop was a great opportunity to share ideas with the leaders and potential leaders of IAIP.

In October, several of our members attended the CA Council meeting hosted by Monterey Chapter of IAIP at The Embassy Suites in Monterey, CA.

The Community Action committee continued their support of our local school children by working with a local elementary school, where we collected Christmas wrapped cereal boxes for their students. This has become an annual event for us and we look forward to being able to provide for some of the children who never get to pick their own cereal that doesn't "come in a bag". Every year our goal is to collect 75 boxes and this year we far exceed that number in donations. I'm so proud of our membership for their generosity, which allows us to provide a cereal treat for even more students.

Every year we hold a fundraiser for our Scholarship program and every year it is a great success! In February, the "Not So Auction/Auction" Fund Raiser was held and due to its popularity, we successfully raised funds for scholarships that are presented to students during our May Luncheon. This is a function that everyone looks forward to, both members and non-members.

Our annual May Luncheon is held during National IAIP week and was well attended by many individuals in the industry and as mentioned above, we were able to present scholarships to 4 very well deserving recipients.

Education is very important to IAOF and we were able to hold an Educational Event locally that provided great content and Continuing Education credits for our local insurance community. In addition we will continue to promote IAIP Educational Courses and encourage members to earn their CLP Designations.

For 2017/18 term our members, Kim Cameron, serves as the RVP of Region VII and Alison Holmes serves as the a assistant to the RVP

Respectfully Submitted,

Robin Souza, CPCU, CIC, CRM, AFIS, AIS, AIC, AINS, CIIP-2017/18 IAOF President



Insurance Professionals of Los Angeles

The Insurance Professionals of Los Angeles, Inc. (IPLA) modified its bylaws in 2016. The biggest change to the bylaws was to meet quarterly for its business meetings and if needed, add any special events to the calendar. In addition, IPLA modified the terms of the President and President Elect to a two-year term, mirroring Region VII Vice President. Modifying the term allowed the President Elect to learn, grow and understand the position and responsibilities of the presidency. We found that it also provided a comfort level to the incoming President.

Over the past year, IPLA had a membership mixer, community action events, "MEND" for the homeless and business sessions. We held our membership mixer at Anejo Cantina & Grill and it was a successful event. IPLA secured three new members from this event. We will have another mixer later on in the year.

*This year we will move forward with the President's theme **C.O.U.R.S.E. Community Outreach Using Resources, Skills and Education**. Our Industry unlike many in this Millennial/Generation Z age are not keeping up with the growth pace because people are either not joining this illustrious field or they are out pacing this field by retirement. What an awesome opportunity we could have by joining forces with an organization or two who we partner with by either donating "work clothes" or mentoring someone entering this field. As President, I will continue this theme throughout 2019 as well.*

We started in 2017 with personal growth and proud to state that we have three members with your CLP Designations and two working towards this designation. We have had informative meetings on Cyber Crime, Crime Awareness and CWC instruction. Christine Chandler Tillett, PHR, CLP taught CWC course and Kari Woods went on to compete at Regional and was awarded as the winner. Kari went on to compete at National in St. Louis.

As stated previously, IPLA meets quarterly. We found that it made the meeting more affordable (no employer support) and convenient for members attending to have that work/life balance. Although meeting quarterly, the Board meets every other month and communicates feedback to members via email. Any IAIP marketing email received is also broadcasted to the membership body. We have designated two Membership Mixers this year to promote IAIP and gain some growth to IPLA. As with most associations, we experienced a retention loss whether through relocations, loss of employment, retirement, health, personal reasons or other factors. Retention is something that IPLA is looking at and trying to retain its members as well as build with new members.

IPLA supports its sister associations and an avid supporter of the Legacy Foundation as we truly believe in its cause. The support to the Legacy Foundation is from membership itself or fundraising efforts. We also advise members to apply for scholarships through the Legacy Foundation for continued growth opportunities. IPLA will continue to support its community and the Legacy Foundation in 2018-2019.

*Respectfully submitted,
Kari Woods-President, IPLA*



Insurance Professionals of Monterey Bay

This particular year was a year of great accomplishment and satisfaction. That is because, in October, our chapter would be hosting the 31st California Council Meeting in Seaside, California. We bid to host the meeting in 2014 and now all of our hard work of planning, fundraising & negotiating would be coming to fruition. But I don't have to really explain all this to my fellow chapters as you all have done this many times. But this was only our second time. The first time was back in 2003 when we co-chaired it with the Peninsula Insurance Women's Association with Judy LeBel at the helm and Leslie Frates from IPMB by her side. So much had changed since 2003. PIWA had turned in their charter. Most of the 2017-18 IPMB members were not members back in 2003. In fact, many of the 2017-18 IPMB members had not even attended a Council Meeting. So they really had no point of reference except from what a few of us who had attended a Council Meeting told them. But, we were lucky to have Robin Fawkes, formally of PIWA on our team to help us navigate this undertaking!

Our plan was to be a little different than other Council Meetings as we wanted it to be one to remember. We scheduled the meeting in late October to keep rates down since the Monterey area is in high demand. In lieu of a Welcome Party, we did a Welcome Reception at the hotel with a full-host bar and hors d'oeuvres. Afterwards, we had two shuttle buses to take attendees out of the hotel to enjoy dinner on their own at Cannery Row or Fisherman's Wharf. We were happy that we did not have to worry about anyone driving. Our keynote speaker was Brodie Greer who played 'Bear' on the '80's hit television series "Chips". He was so funny and entertaining & we think he might have taken a liking to our Council Director, Carol Russell! For the Saturday Night Awards Dinner, we hosted a Halloween Costume Party. And the attendees did not disappoint. Everybody came in costume! The decorations in the room and on the table were phenomenal. Many, many prizes were given out. Much fun was had by all. Unfortunately, 7 members who registered to attend the meeting could not make it due to various reasons. Several members had to cancel due to the horrific fires in the Napa area. I am happy to report, that we were able to refund all 7 registration fees. That is \$875 back to the members! It was an honor to co-chair this conference with Nancy Hudson and I am so extremely proud of our chapter members of what we accomplished.

In May of 2018, we gave out not one but two \$1,000 college scholarships to High School Seniors Cera Huffman from Live Oaks High School out of Morgan Hill and Mahayla Cochrane from Carmel High School. Much thanks goes to Bev Weakley for her hard work & commitment chairing this committee and to Mary Myrick-Sunkler for being on the Scholarship Committee with me & Bev. I was lucky enough to make the call to these young women and tell them the good news that they had won. I also got to present to them their certificates and checks with their proud family members looking on & taking pictures. For me, that was the highlight of my year as these women are a great representation of our youth & it felt great to help them out. We also were able to contribute \$200 to the Scholarship Fund of the Insurance Association of Fresno. Yes, the 2017-2018 year was one to remember and look fondly back on.

Respectfully submitted,

Elaine P. Sorensen, AIS, CIIP- President 2018-2019



*Insurance Professionals
of Orange County*

Insurance Professionals of Orange County

First I want to thank all those who attended the 2017 Region VII Conference in March; for those who could not make it, you missed one heck of a Conference, hosted by IPOC, in Orange County. Thank you to all the members of IPOC who worked very hard to make it happen. We were proud to host the first Region VII Conference. Yes, we DID OUR THING in 2017!

We began our 2017 fiscal year in August with a 1 hr. C.E. class on "Recent Developments in Employment Law", followed in September with "Cyber Insurance" presented by Travelers Insurance. We added humor to our Safety meeting in October a short Crime Awareness Seminar with Byron Walls of California Crimefight. Continuing with our Community Outreach programs in December with donations to Mary's Kitchen. January was our legislation month with Daniel Shook of San Diego giving us some insight on Cannabis Regulatory Environments. Christine Chandler Tillett, PHR, CLP the California Director-Elect joined us for our February membership meeting; and in March we learned about Identity Fraud & Theft. April we were busy with our popular 8th Annual Fashion Show, with fashions furnished by WHW/M and their retail outlet, De Ja New. Our most popular model was Nathaniel Tillett (yes, Christine's son)

In March 2018 members of IPOC trekked to Phoenix, Arizona for the Region VII Conference, hosted by Valley of the Sun Insurance Professionals. A fun time was had, along with education and networking. IPOC members honored with awards were Brooke Lesniak for Rookie of the Year and Young New Professionals of the Year. President Freeda Koopmans was awarded Insurance Professional of the Year. Brooke was presented the International Rookie of the Year at the Convention in St. Louis. Freeda was awarded the Gayle Reskin Angel Award at the 2017 California Council held in Monterey. Thanks much to VSIP and to IPMB for their hard work. We know how much effort it takes to put on a conference.

Our members were busy serving on committees on the Council, Regional and International levels. IPOC is very proud of our five members currently serving on the 2018 CA Council Cabinet. We are active on social media where we publish events and meeting information. IPOC now has a newsletter along with our website, Facebook page, Twitter and Linked-In page; thank you Regina Lemanowicz, our editor and webmaster!

We were thrilled to present our charity Mary's Kitchen with over 1100 pairs of white socks collected at the 2017 Regional Conference, as well as money, clothing and personal hygiene items. We also support WHW with gently used clothing and monetary donations. WHW provides students with computer education skills, interview skills, how to prepare a resume and how to dress for an interview and professionally for work. We also donated annual scholarships to the Center for Insurance Studies, Cal-State Fullerton.

Sad to report that we lost three of our past Presidents: Gloria Burke, WCCP, President in 1999 passed away in April, 2017, Cynthia Green, CPIW in October, 2017 and Jan Waddell, CPIW, President in 1974 and the first California State Director in 1988, passed away in May, 2018. All ladies were mentors to us and helped to make IPOC continue to grow. We have had a great year and our hope is to continue well into the future.

In Fellowship,

Freeda Koopmans, AU, AAI -President, 2017- 2018



Insurance Professionals of Sacramento

Our community focus this year was about supporting two very wonderful organizations, Kits & Kats and Chicks in Crisis. Both organizations are very worthy organizations.

Insurance Professionals of Sacramento members were able to attend State/Regionals and Nationals this past year and in doing so they were able to share what classes they took, participate in events and let our local members know what is going on within each level of the IAIP organization.

Much of our focus this year was on our upcoming 2019 Region VII Conference. We will be hosting the event at the Doubletree Inn in Sacramento. Come find your Pot of Gold. A lot of planning is going into this conference to make it the best conference ever.

Sue Cutter

President



On behalf of the 2018 California Council we wish to thank the associations that were able to provide reports.

Christine Chandler Tillett, PHR, CLP

CA Council Director



San Diego Association of Insurance Professionals

My theme has been Power your Potential. Last year at the beginning of the term I purposed a goal to the association of gaining 12 new members throughout the year. When I first brought this goal up I thought that I was a little crazy, and I am sure that my association did as well. But I am so extremely proud of the support and the outcome that happened. Over the year, we were able to reach that goal while it seemed a little daunting in the beginning I knew that we would be able to achieve this goal.

Charities have always been a big part of SDAIP, this last year we added 3 new charities that we gave back to. So we currently have a total of 5 charities that we give back to every year. We continue to serve lunch at Rachel's Women's Shelter every Saturday, continue to support Grossmont College and the Office Professional Training Program and we have added Autism and San Diego Blind Community as our new charities.

Last year we teamed up with Professional Women in Insurance to hold our annual Golf Tournament and we had a great deal of success. This enabled us to give back even more to our local charities.

We have had some amazing speakers over the past year, ranging from Healthcare, Life Insurance, Information Technology and even a personal safety class. Our Christmas give back meeting this year was a huge success we had over 75 people in attendance, and fun was had by all. Bunco night has continued to be a huge draw for us where members will play for raffle tickets. Our Young New Professionals are still in the mix with Baseball Games, networking meeting and most recently just holding a Meet Up at a local restaurant.

Our members had a busy year serving on all levels of IAIP.

All in all it has been a very good year for us and we are so encouraged to continue to grow, thrive and give back to other associations, communities and charities.

In Fellowship,

*Dawn Manzano, CISR
President SDAIP*



San Francisco
Insurance Professionals

San Francisco Insurance Professionals

Under the leadership of Cassandra Yu as President, we had a busy year full of membership events and Lunch & Learn meetings.

On July 11, 2017, we installed the new board at Roy's Restaurant. Cassandra chose a Zoo Ceremony. Aware of it or not, each of us are all unique creatures, and she looked forward to working with each of us to help guide us up the ladder of succession! Susan Baja was her Installation Officer and did an awesome job!

The 13th Annual Golf Tournament was held on August 11th at Tilden Park Golf Course in Berkeley, CA. Marie Meadows and Annette Ing-Firmeza have been co-chairing this event for the past few years and it is our top money-making event. Year over year, we have always exceeded the prior year's revenue, and this has enabled us to donate money to various charities throughout the year.

September 16th was our Day at the Races at Golden Gate Fields in Berkeley, CA. Rae Lynn Zachary chaired this fun event. She had a Men's and Women's Hat Contest and a raffle to raise money for At The Crossroads. This organization reaches out to homeless youth and young adults at their point of need and works with them to build healthy and fulfilling lives. It was agreed that SFIP would donate \$250 for this great charity.

Our annual holiday luncheon was held on December 12th at Roy's Restaurant. The charity we selected to honor was Donaldina Cameron House. Donaldina Cameron was a Presbyterian missionary in San Francisco's Chinatown who rescued more than 3,000 Chinese immigrant girls and women from indentured servitude and prostitution. Today, Cameron House serves as a multi-service agency serving Asian communities by promoting programs such as youth sports, tutoring and counseling. All proceeds from the raffle were given to Cameron House. SFIP also donated \$250 towards this worthy charity. Jenny Schaeffler gave VeriClaim bags to all attendees and Cassandra Yu, put together cute little Hot Cocoa Reindeers as a gift for attending our luncheon. Roberta Gonzalez loved them so much that she asked Cassandra to make some for her holiday event.

We held our first SFIP Bowling Membership Mixer on February 28th at the Yerba Buena Center in San Francisco. Jenny Schaeffler and Maritza Portillo did an excellent job of organizing this event. We are very grateful to Aon, VeriClaim and SFIP their sponsorship. We had a raffle and there were enough donations that almost every person attending received a prize! We were also able to generate interest from 4-5 people that attended this event to join our chapter. In April, we had a Lunch & Learn meeting about Insurance Analytics: From Raw Data to Actionable Insights. Our speaker was Naresh Raheja, who presented an overview of insurance analytics, machine learning and AI concepts, with examples of analytics in the underwriting, claims and risk management areas.

I have never seen Easter and April Fool's Day land on the same day – probably because I wasn't born until after 1956! For the first time since 1956, they have fallen on the same day this year. This has only happened four times in history: 1923, 1934, 1945 and 1956. This won't happen again until 2029. Just a bit of trivia that I found interesting to mention.

Our May Industry Luncheon was held on May 22nd at Palio De Asti in San Francisco. Mike Aberly of Nextway was the keynote speaker and spoke about marijuana which is a hot topic these days. His catchy speech was, "How Close Can You Get to Marijuana Without Being Burned – Next Steps". He explored risk management issues faced by businesses participating (directly or indirectly) in the legal cannabis space, employers, and health care providers. We gave the following awards during our luncheon: Hall of Fame Award – Rae Lynn Zachary, ARM, CPCU, CPIW, CLP, DAE; Insurance Member of the Year: Maritza Portillo, Aon Risk Insurance Services West, Inc.; Company of the Year to Aon Risk Insurance Services West, Inc. and Individual of the Year to Roger Howe, VP-Regional Marine Starr Companies for their consistent support of our association.

In Fellowship,

Cassandra Yu, 2017 President and Annette Ing-Firmeza, 2017 President Elect



- **January 18, 2018** - Basic Flood taught by George Blaufuss, Regional Field Relations Mgr, Nat'l Flood Services;
- **February 15, 2018** - California Earthquake Authority Coverage, Tim Watts, Agent Services Representative, CEA;
- **March 15, 2018** - Ethics Course taught by Kathy Marshall, IICRC, CSS, National Account Mgr at Baker Commodities;
- **April 19, 2018** - Errors & Omissions taught by Kevin M. Kershisnik, Sr. VP, Socius Insurance Services Inc.;
- **May 17, 2018** - Products Recall Insurance, Lloyds of London Insurance Coverages and Basic Cyber Liability & Network Security taught by Anthony Joseph ACII, CIP and Lori Hunter, CPCU, ASLI & Joe Roebuck Sr. VP, both instructors with Worldwide Facilities, LLC.

On Sunday March 18th, South Bay AIP hosted our first “*Mad Hatter*” *Membership Tea Mixer* at Chado Tea, Torrance CA coordinated by Sarah Jane Jara, CLP, SBAIP VP and Membership Chair. We had a fabulous time and SBAIP members showed up with family and friends! What a pleasant surprise to be joined by our Region VII VP Kim Cameron, Karen Peters, Sarah Kelly who looked absolutely beautiful. Great time, delicious Tea, fresh baked scones and finger sandwiches and the potential to gain two new members... A huge THANK YOU to all who shared this day with us!

One way of grasping our Members attention was to move a bit toward technology, if you will. SBAIP asked for it and received a more efficient and effective way of accessing our membership programs, education and events with the ease of online payment service that enables us to use bank or credit card payments. It took some team effort and lots of time and research but thank goodness for Keri Thompson's dedication to bringing it to fruition. We are encouraged to take advantage of our Pay Pal options and more importantly, check out our SBAIP Website.

<https://www.internationalinsuranceprofessionals.org/members/group.aspx?id=40236>

Cheers to becoming more engaged!

South Bay Association of Insurance Professionals teamed up with Insurance Professionals of Orange County (IPOC) for a Golf Tournament Fundraiser held at the *Coyote Hills Country Club in Fullerton, CA on September 13, 2018*. The funds collected through this fundraiser will go towards the 2020 IAIP California State Conference hosted by South Bay.

The association has had a great year and look forward to continued success.

In fellowship,

Sandra

Sandra L. Johnson, CISR, AIS - President SBAIP, 2016-2018

Connecting members. Building careers.