



Insurance Women of Toledo
Where Professionals Connect, Learn and Grow.

June, 2009 Bulletin

President's Message

Nancy Homan, CISR, CPIW

May 1st & 2nd was the Ohio Council Education Day in Fairborn, Ohio hosted by Insurance Women of West Central Ohio. Friday evening started with a hospitality room with snacks, games and networking along with NAIW's The ABC's of Time Management class. Saturday we had two guest speakers: Kevin Duffin spoke on Retirement Planning and Dennis Thomas spoke on Insurance Fraud. Following lunch we had a brief business meeting with the Installation of Officers, committee reports, Tike Sticker report, confirmation of future state meeting bids and awards. The AAMGA Award went to Pat Johnson, Director Award went to Angie Schmidt and the Excellence in Action Award went to Sue Shaw (individual) and Buckeye Insurance Women (group).

Betsy Adams is running for the Region IV RVP in 2010 and for more info go to her blog on www.naiw.yourmembership.com blog name Betsy – Ohio

We had eight individuals who walked May 9th for Making Strides Against Breast Cancer/Save the Ta Ta's. Thanks to all of you and to Allison Adkins for getting us organized.

May 13 was our IWOT Annual May Breakfast. We received a proclamation from the Mayor of Toledo and the guest speaker was Kristian Brown from 13 ABC Action News. During a brief meeting we voted on the Bylaw change which primarily amended the membership eligibility and the change was adopted.

Sue Dawley and I just returned from the NAIW 68th Annual Convention that was held in New Orleans, LA. What an experience! Small Changes . . . Extraordinary Results aligning for a stronger tomorrow was Jenelle Duffy's theme of our convention. Seventy-one individuals from the conference started on Wednesday morning with a community service project in cooperation with Trinity Christian Community & Americorps by picking up trash and cleaning up empty lots by pulling and cutting down weeds in the Hollygrove neighborhood. We returned to the hotel for a quick shower and then off on a Big Easy City & Recovery Tour. Then from 7-8 there was a Walk-A-Thon benefiting the Laura Bush Foundation for America's Libraries. Thursday started with workshops and classes. Late afternoon Sue attended a First Timers Orientation with 94 First Timers and after that we went to the Delegates Briefing and Meet the Candidates followed by the 1st General Session. Friday morning started with the 2nd General Session and the CWC Speak off competition with nine individuals competing. From 12:00-2:00 was the Awards Luncheon. Many Scholarships were presented along with recognition of the new DAE's and CPIW's. Winners announced were the Rookie/Robin Railsback, CWC/Jennifer Scarberry, Claims Professional/Florence Nagy, Insurance Professional/Taffy Troup, Risk Manager/Lynn Runyan, Professional Underwriter/Tam Hileman, AAMGA & NAIW President's Award/E.Faye Evans and Arlene DeSemone Award/Diane Ziemann. Following the Award Luncheon we had many educational opportunities. Saturday morning was the 3rd General Session consisted of the President's farewell, convention in review, Installation and the ISFA report followed by more educational opportunities. Saturday evening was the closing night event with The Yat Pack. Wow a lot went on in just a few days! The keynote speaker was W. Sidney

Young, PH.D a professional psychologist and former US Army chaplain. Our new NAIW President/Linda Wilson, President-Elect/Margaret Wildi, Vice President/Joi Wilson and Secretary/Penny Haworth-Rich. The 2010 Convention will be June 9th – 12th in Washington, DC with a theme “Bridge To Your Horizon”. We heard talk that 2011 may be in LasVegas.

Saturday is The Clara Vail Memorial Tri-City Bowling Tournament being held at Southwyck Bowling Lanes with Insurance Women of Cleveland, Insurance Association of Metro Detroit and Insurance Women of Toledo competing for “The Trophy”. Thanks to all that are bowling and cheering and a special “Thanks” to Marla Wholf and Bev Hammond for getting us organized. Lets bring home the trophy!

I want to thank my “Slate of Officers”! You have made it very easy for me and I am very proud of each and everyone of you for all of your great ideas, growth and accomplishments. “Thank You”! In closing I want to let you know that it has been a pleasure to serve as your President this year and “Thank” each of you for this opportunity. I just can not say enough about our local association . . . you are the best!

Programs

Sue Dawley, CIC, CPIW

It’s hard to believe this year is coming to an end. I think we had some great programs this year. I hope you enjoyed them as much as I did.

September – Spaghetti Warehouse

Kate Becker and I worked together to kick off our Community Service project for the year. Doris and Hannah Turner were our guests, and told us the story behind Hannah’s Socks how they started collecting socks and clothing items for those in need. Thanks to Kate and all of you, our members, for the wonderful donations to Hannah’s Socks throughout the year.

October – Packo’s at the Park.

We honored our Past Presidents at the meeting and thanked them for lighting the way for Insurance Women by presenting them each with a candle from Swan Creek Candles. October is also safety month and Katie Hamman arranged for a speaker associated with the Fire Department for our program. However, at the last minute the speaker was unable to attend.

November – Hilton Garden Inn at Levis Commons

Industry Night was a tribute to our industry and the “Shining Stars of our Agencies”. We had a great program and recognized many of our members for their educational achievements and their contributions to our association. The evening was a great success.

December – Real Seafood at the Docks

At our Christmas meeting we were entertained by the Centre Spotlight Chorus which included our own Kathy Bartlett. Their music was a great way to put us in the holiday spirit along with our Christmas ornament exchange.

January – SouthBriar in Sylvania

Despite the snowy weather, our “Meet and Greet” meeting in January was a fun filled night with shopping, eating and getting to know each other better. I sure did my share of shopping! Special Thanks to our Vendors:

Amy Gueli – The Limelite Boutique
Ellen Steiner – Paula’s Pearls
Missy Bevier – Votre Vu – French Skin Care
Phyllis Bartholomy – Bartholomy Massage Therapy

February – LaScola Italian Grill

Education night was organized by Sandy Dobbins and her committee. The speaker Vickey Johnson from AAA Standard Services, Inc. was very good and we learned quite a bit about germs, mold and household cleaners.

March – Granite City Food & Brewery at Fallen Timbers

Our speaker for the evening was Dr. Patrick Daney. He spoke to us about nutrition and how nutrition plays a role with various diseases in our society. His website opens up with “Restoring Balance & Overall Health”, and his Newsletter has many helpful tips.

April – Fritz and Alfredo’s

Diana Waugh of Waugh Consulting spoke on her work with nursing homes, and gave us some great tips on communicating with friends & relatives with cognitive loss. Her workbook “I Was Thinking – Unlocking the Door to Successful Conversations with Loved Ones with Cognitive Loss” is very useful when faced with this situation.

May – The Toledo Club

Rachel Schneider and her committee put on a delightful May breakfast meeting. The Mayor Carty Finkbeiner presented us with a proclamation for National Association of Insurance Woman’s week. Our speaker Kristian Brown from 13ABC news had us in stitches as she told of her efforts to balance work and motherhood, and we all walked away with a goody bag full of surprises. And if by chance you watched the news that night, you may have caught a glimpse of yourself.

June – Brandywine Country Club

June will be the installation of officers for the upcoming IWOT term. With Bev Smith and Marla Wholf planning the installation I’m sure we will have a very fun night. I hope to see you all there.

I would like to thank all of the members who have worked so hard this year to make each and every meeting a great success. With team work and involvement the Insurance Women of Toledo continues to be a great organization.

Education

Sandy Dobbins, CISR, CPSR, CIC, CPIW

We had a great 2008-2009 year; it’s hard to believe that the time has gone.

November’s Industry Night presented Shining Star Awards which was quite enlightening. We honored many members’ accomplishments that night and among that; our "educational designations" were presented to Rachel Schneider for CPIW, Beverly Smith for DAE and Allison Adkins for CIC.

CWC was the class chosen by popular vote back in September 2008. This class took place for several weeks in January and February, held at Talus Brokerage Service. We had several attend and successfully complete this course taught by Becky Stewart. Watch to see if you can tell which of our members have polished their speaking talents from this class. Maybe we will see a CWC contestant step forward next year?

At February's Education meeting; we were honored to have Vickey Johnson from AAA Standard Services speak to us. She had many several interesting stories and "warnings" to share with us. We had great fun watching her lab tests for fungus, mold and bacteria.

I would like to take this opportunity to thank Suzanne Bossert of AAA Standard Services and Kristy Dutton of Paul Davis Restoration & Remodeling for your continued support to IWOT. It's always so nice to see your smiling faces at our meetings; we are so excited for 2009-2010 year.

June's Quote: "*The aim of education should be to teach us how to think, rather than what to think.*" (**James Beattie**)

By-Laws

Allison Adkins, CIC

IWOT SLATE OF OFFICER FOR THE 2009-2010 TERM

PRESIDENT	<i>Sue Dawley, CIC, CPIW (Hylant Group)</i>
PAST PRESIDENT	<i>Nancy Homan, CISR, CPIW (Meister Insurance)</i>
PRESIDENT ELECT	<i>Sandy Dobbins, CISR, CPSR, CIC, CIPW (Hylant Group)</i>
VICE PRESIDENT/EDUCATION	<i>Allison Adkins, CIC (Knight Crockett Miller Ins.)</i>
SECRETARY	<i>Debby Gomez, CIC, CISR, CPIW (Roemer Ins.)</i>
TREASURER	<i>Donna Wymer AIC, CPCU, CPIW, DAE (G.K. Wymer Adjusting Co.)</i>
BY-LAWS	<i>Laurie Caputo (Frankenmuth Insurance)</i>
LEGISLATION	<i>Becky Stewart, MHP, CPIW, HIA (Hylant Group)</i>
LONG RANGE PLANNING	<i>Marla Wholf, CIC, CPIW (Hylant Group)</i>
FINANCE & BUDGET	<i>Kristy Dutton, (Paul Davis Restoration)</i>
MEMBERSHIP	<i>Sandy Powder, Sunforest Transportation Insurance Group</i>
PUBLIC RELATIONS	<i>Rose Ann Koperski, CIC, CPIW, (Brooks Insurance)</i>
SAFETY	<i>Katie Hamman, CISR (Brooks Insurance)</i>
COMMUNITY SERVICE	<i>Cindy Bartley, (New York Life)</i>
BULLETIN	<i>Jenny Mominee, CPIA, CISR (Sunforest Transportation Insurance Group)</i>
WEB COORDINATOR	<i>Jessica Pratt, (Sunforest Transportation Insurance Group)</i>
<u>Appointed Positions:</u>	
AWARDS	<i>Traci Shook, (Talus Brokerage)</i>
EMPLOYMENT	<i>Louise Murphy, (Medical Mutual of Ohio)</i>
PARLIAMENTARIAN	<i>Beverly Smith, MPH, HIA, CPIW, DAE, (Hylant Group)</i>
RESERVATIONS	<i>Rachel Schneider, HIA (Huntington Insurance)</i>

Membership

Sandi Mominee, CIC, AIS, CPIW

Our new members for the 2008-2009 term are:

Jessica Pratt Sunforest Transportation
Cindy Bartley New York Life
Michelle Carr The Delp Co.
Cynthia Matus Knight Crockett Miller
Louise Murphy MMO
Jennifer Waldvogel MMO
Sheryl Gochenour MMO
Susie Williams Westgate Insurance
Susan Santanna Westgate Insurance
Jeanne Steir MMO

Recent changes to our By-Laws will allow us even more opportunity to grow in the next year. Thank you to all of our new members. We look forward to your ideas and participation

Bulletin

Jenny Mominee, CISR, CPIA

“Get to Know”

Laurie Caputo, CIC, CISR, CPIW
Frankenmuth Insurance



1	Date you Became IWOT Member	I actually was a member in 1996-1997 and then rejoined in 2008.
2	First job	Donut Girl at Frisch's Big Boy
3	High School	Clay Sr. High School Oregon, OH
4	Family details	Married to Mike, two sons-Tony(23) and Mark(19) I also have two grandsons Preston(14 months) and Konnor (7 Months)
5	Favorite activity / hobby	Golfing with my husband and riding my motorcycle!
6	Favorite restaurant	Ernesto's in Genoa-They know us by name and drink!

7	Favorite T.V. Show	Survivor, Amazing Race, Dr. Phil
8	Favorite vacation spot	Pettit Lake Newaygo, MI
9	Favorite all-time movie	A Star is Born with Barbara Streisand/Kris Kristofferson
10	Favorite band / singer	I actually like all kinds of music.....80's...Country....Rock....but U2 is probably my favorite band!
11	Most embarrassing work moment	When I ran out of gas in new my company car with my boss traveling with me.....not good when he has to push your car off the road and then go with a stranger to get you gas!
12	Favorite adult beverage	Cosmopolitan/Margarita
13	Special Pets	Mia-our lapsa opsa/shitzu mix.....I swear she found us.....
14	Secret Vice	Brighton Jewelry-shhhh don't tell my husband!
15	Three words that describe me best	dedicated, adventurous, easy going
16	I'm really good at	making PERFECT margarita's
17	Favorite Sport / Team	NHRA Drag Racing for sure!
18	Most Memorable IWOT moment	I really don't have a specific moment that I can recall but I do enjoy getting to know the other women that work in the Industry in our area. A lot of times we think of them as our competitor but IWOT brings us together in a way that we can appreciate our competition and friends in the industry.

Employment

Traci Shook

#1



Customer Service Representative

Seeking a team-oriented, detail-minded customer service representative to service either our personal or commercial clients. Position requires a quick learner and problem solver with exceptional organizational skills. Must handle a variety of issues while remaining detailed and precise. Responsible for many computer-related tasks including:

- *Issuing policies*
- *Requesting coverage changes*
- *Providing insurance quotes*

Experience with Windows, MS Word and Excel required. Applied Systems knowledge a plus. Excellent salary and benefits package.

Contact:

Grayce Scardina- CIC

(419) 720-OHIO (6446) / Fax (419) 882-3911

#2

Candidates can apply on www.Huntington.com and referencing IRC83174

Job Posting Title **IRC83174**

Job Title **Employee Benefits Account Relationship Representative**

Organization **Huntington Insurance**
Name

Department
Description

Full Time / Non Exempt position

Location: Maumee, OH

Brief Posting
Description

This position has technical knowledge and capability to service the assigned book of business with producer and management involvement. Assignments are closely monitored and work is screened to ensure that policies and procedures are followed and to identify difficult or unusual problems. This position will service complex-mostly self funded accounts. Service to include managing the marketing/quoting/proposal process for new and renewal business, educating on compliance to carrier, state, & fed regs, assist with renewal, enrollment, implementation meetings, plancost summary/claims analysis reporting. The position will manage the day to day client calls related to service, plan requirements and questions.

Detailed
Description

- 1. Self Management and development**
 - a. Meets with Supervisor to agree upon goals and performance standards to ensure alignment and gain agreement
 - b. Presents updates to goals as indicated throughout year
 - c. Represents Huntington Insurance as product expert by staying current of changes, trends and opportunities within the industry
- 2. Follow Agency Procedures**
 - a. Follow procedures as outlined in the Workflow and Procedure Manual
 - b. Utilize available automation and software applications following proper procedures including document management, Fax Advantage and the agency management system.
 - c. Follow procedures as outlined in the Huntington Employee Handbook
 - d. Identifies training needs to the department manager
- 3. Provide Customer Service to the Assigned Book of Business**
 - a. Respond to customer inquiries within 1 business day
 - b. Takes ownership of customer (internal and external) questions and problems with resolution within 1 business day of receiving the data in order to make an informed response
 - c. Follow required service standards (appointments, service requirements, standards of excellence, strategizing / agendas, etc.)
 - d. Coordinate and communicate with the producer on open issues and account status
 - e. Provides feedback to the department manager for review and resolution, any carrier issues identified
- 4. Assist in the Coordination and Timely Delivery of Renewals**
 - a. Oversee and direct the market survey process. This is done in conjunction with the producer if assigned
 - b. Delivery of renewal recommendations within established time frame
 - c. Obtain data required in order to finalize the renewal process
 - d. Prepares and submits quote requests and tracks timely receipt
 - e. Prepares proposal for delivery to client by Producer
 - f. Implement policy order once renewal order has been received from the client
 - g. Process policies in accordance with established procedures
 - h. Identify add on lines of business and implement where possible
 - i. Seek referrals and provide to other divisions
 - j. Assist the producer as requested with prospects
- 5. Maintain Client Data**
 - a. Update policy information throughout the year per established standards
 - b. Maintain client contact data, carriers and other pertinent information within the agency management system
 - c. Enter activities per the established guidelines and provide timely follow up to open activities
 - d. Utilize the document management system and naming conventions as defined within the workflow procedures

Job
Requirements

Health & Life License REQUIRED

3 years of insurance servicing experience

Good Written & Oral Communication

Health, Life, Ancillary Carrier product education

Excel - spreadsheet experience

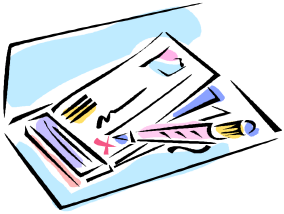
Computer Skills-Microsoft Office

Agency Management Systems - Sagitta & CBD Doc

Internet/Web Based Programs

Calendar of Up-coming Events

General Meeting/Installation . . .June 10th
Summer (July/August) 2nd Wednesday Stay tune for something special
Networking Weekend . . . August 21-23/Scioto Valley
Ohio Council Meeting . . . November 6th & 7th/Van Wert



IWOT CHECK REQUEST FORM

Date: _____

Issue to: _____

Amount: \$ _____

Purpose: _____

Budget Category: _____

Person
Requesting Check: _____

TREASURER

Date Paid: _____

Check #: _____

Comments: _____

