



February 25, 2015
State Farm Kalamazoo Operations Center

Southwestern Michigan CPCU
Society Chapter

- Welcome – President Kim Bragg
 - Next meeting will be in May – Members will buy own lunch at an offsite location.
 - If you have any input on the way our chapter is run, please let one of the Board members know.
 - Introduction of Board Members
 - Kim Bragg, President
 - Kathy Zuhl, President Elect
 - Anne Crandall, Secretary
 - John Estes, Treasurer
 - Cathy Smith, Board Member
 - Dustin Barrows, Board Member
 - We are in need of a co-secretary to assist with meeting prep and note taking. There is also an open spot on the Board because of the transfer of a person. If you are interested, please contact any Board Member.
 - Dustin is taking over our Chapter Website updating and design. Thanks to DeAnna for all her work on this over the last several years.
 - Recognition of guests
 - Greg Vaughn, 2 parts completed
 - Lori Wilton, 4 parts completed
 - Accomplishments
 - Kim is now a CLU designee
- Chapter business Update
 - Our 2015 Business Plan has been submitted. We will be partnering with several organizations this year.



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- The 2014 Circle of Excellence has been submitted to the National Society
- We are now officially a non-profit organization and incorporated
- We have met all areas of compliance as designated by the National Society
- 2015 Budget
 - Will have a deficit this year due to the filing expense for incorporation. These were one-time fees.
 - If we continue to run a deficit, we may need to consider raising the yearly dues.
 - As of January, we are at \$5,500 surplus.
 - Thank you to everyone who has paid their 2015 dues
 - If you transfer to our chapter from another one, you will need to visit the National Society Website to update your contact information.
- Leadership Summit will be attended by Kathy Z. and Kim in April 2015
- Accomplishments
 - Iota Gamma Sigma partnership: As of February 2015, we have 38 student members.
 - Chapter Interest Groups: 17 of our members have signed up to be involved in this program

- Guest Speaker – AJ Gray, State Farm Toastmasters President
 - Toastmasters is one of our 2015 Chapter partners
 - AJ presented us with an overview of Toastmasters and how we can work together in a collaborative relationship
 - Can assist with networking, leadership, and personal development. Even if you just want to practice a presentation you need to give. This is a great place to do that in a safe, supportive environment.
 - Can join the State Farm group or either of the two Kalamazoo area groups

- Member Engagement/Committees—President Elect Kathy Zuhl
 - Committees
 - Good Works—Andy O’Hern & Jenny Calloway
 - Sponsor committee events
 - 2015 will have 2-4 events. Look for more information
 - Education—Dawn Norlander & Dustin Barrows
 - March 26 partnering with Young Business Professional ERG group to discuss how we can support their development
 - Will have an informational session on business degrees
 - Are planning to have email blasts on things happening in the insurance industry
 - If you are interested in ideas or being on this committee, please share with this group.
 - Mentoring & Recruitment—AJ Gray & Chad Ahlemeyer
 - Have a bulletin board in KOC and soon in KAB to alert employees about current activities.
 - Having three sessions with Toastmasters to help build membership in both organizations
 - Public Relations—Mary Ann Flinn & Beth Pospisil
 - Looking for new members to support this effort
 - If you know of anyone working on CPCU or is a completer who is not a current member, please invite them to a meeting
 - If you are not on a committee, we would love to have you! Time commitment is minimal (1-2 hours a quarter-- including meetings with the committee). This is a great way to meet new people and help build awareness of CPCU. Here is form to complete to show your interest. Please return this form to Kathy Zuhl.



Committee
Memo.docx

- Drawing Winners
 - John Estes--Gift Certificate
 - Towanda Maye--Owl

- Closing
 - Next meeting in May—look for your invitation

Thanks for attending today!