



IAIP Region VII



Fall 2022
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<https://iaipregion7.org/>

LEADERSHIP-EDUCATION-ACHIEVEMENT-DEVELOPMENT

“Take Care of You”



Conversations with Christine

Region VII RVP, Christine Chandler Tillett, aPHR, CLP, CDP, CRIS, TRIP, MLIS, CIIP

Salutations Region VII.

Really. November is just around the corner. Wow, I thought 2020 and 2021 blew by but now we are almost at the end of 2022. I cannot believe that in a few months, 2022 will be history. We are still struggling with the COVID variants, but it is much better than it was. I continue to send positive thoughts to those battling COVID, and the residuals left behind. Well, let us get to the things happening and important dates to remember.

I would like to extend my congratulations to all the CA Council Award winners looking forward to seeing some of those winners applying for Region VII International awards. To Dawn Manzano, CISR, CLP, CIIP

and her team on a phenomenal Council Meeting and kudos to San Francisco Insurance Professionals and friends for hosting a wonderful Council Meeting. Looking forward to Hawaii's Council Meeting in November.

Regina Lemanowicz, CLP Marketing Director, and her liaison Chenise Blalock are doing a fantastic job in updating the website. Stop and take a moment to review the website. It has a plethora of information. This newsletter is put together by Regina and she does an excellent job at it. Thank you, Marketing for all you do!

Keri Herlong, CPCU, CIC, CRM CISR, ACSR, AIM, CIIP, CLP, DAE, CRIS is our Education Director and along

with her team, Martha Nobriga, CPIW, CPSR and Gina Thomas Patterson, CISR Elite, CPIW, CLP, DAE continue to update us on all the happenings with education.

Terri Brennan, Member at Large (MAL) Director is working the non-renewal list and recently completed a "We Miss You" campaign sending postcards to members that non-renewed from 2020 & 2021. Terri works with her liaisons Micheal Bonham, CIC, CPIW and Kelly Reese, AU-M to make sure members are aware of all the changes in IAIP.

Sarah Jane Jara, CLP Membership Director, and her liaisons Sandy Malone (WA), CLP, CIC, CISR, ACSR, DTM, CWC, CIIP, Mark Coberly (HI), and Annette Ing-Firmeza (CA) are also working the member non-renewal list. If you know of any member that has non-renewed and not sure about coming back, reach out to Sarah Jane and her team will contact them. Remember there is an active membership contest going on from July 1 to 1/31/2023.

There is also a contest if you bring in a corporate sponsor, corporate membership, talent development or convention sponsorship and they sign up with IAIP. Here are brief outlines of the programs, you can also find out more in the July Town Hall recording on the IAIP website.

Corporate Membership - Since inception we have enrolled a total of 170 corporate members.

The Corporate Membership gives an organization the ability to enroll select individuals from their company into the membership. These corporate members are then given an all-you-can-consume access to CLP, Selling Essentials, and Career Development. Access to these programs is free to the individual as the origination has paid for their employees to have access to these training and development opportunities.

Talent Development - Similar to the Corporate Membership, an organization is given the opportunity to enroll their employees into IAIP talent and development training by selecting IAIP courses to be delivered in-house. These courses are instructor lead training delivered to the employees either in person or virtually. This program is perfect for organizations that are looking for a customizable and focused approach to training centered on specific topics.

Corporate Partnership - This offering is not focused on delivering education like corporate membership and talent development but giving exposure to a company for the purpose of marketing and product promotion. Corporate partners are given year-round exposure to the

membership for the purpose of brand recognition and industry support. To maximize benefits in addition to year-round exposure, elements of onsite convention participation are included.

Convention Sponsorship - If an organization's goal is face-to-face interaction with the IAIP membership, then convention sponsorship is the perfect path for them. It is also a fantastic way for a new sponsor to become acclimated to the IAIP members and explore additional partnering opportunities in the future. We love seeing our sponsor's faces at convention and filling the Welcome Reception with exhibit booths.

Corporate opportunities would not be possible without the individualized touch of the IAIP members. If you have any potential leads, you can connect with me, or Amanda Hammerli and she will work with you to connect. Perhaps you will be a winner!

Below are a few date reminders, please mark your calendars:

November 6th – we fall back. I do not know about you, but I really need that hour that they took from me. Do not forget Saturday night before putting that head down, turn the clock back an hour (yes, your cell phone does it automatically).

November 7th - YNP SIC: Smart Homes Time: 2:00PM to 3:00PM Eastern

November 7th & 8th - Advanced CLP Virtual: Systems Thinking Time: 4:00 PM - 6:00 PM EST

November 15th - is the deadline for the International Regional Awards. Please get those members who should be recognized to submit their application. Applications after 11:59 pm from the applicant's time zone will not be accepted. If you applied for a Council award, use that as your starting point to type out your qualifications for the International/Regional Awards. I would like to have a submission for each category!

November 15th - is also the date for the 990-N tax form. Have your treasurer or secretary complete the form. It is due every year on the 15th of the 5th month following the closing of the term (June 30th).

November 15th – application to serve on the Foundation Nominating Committee. This committee presents candidates for the Foundation Chair, Directors, Members at-Large and RVP Director, with an average of two or three meetings total. The Nominating Committee

Application is due to the Executive Director at exec.dir@iaip-ins.org by November 15.

November 16 th - Virtual Town Hall @ 1:00 PM EST Join us for the IAIP State of the Association presentation. Delivered at each council and state meeting this Fall, the board will share updates on the association and our focus on advancing IAIP.

November 22 nd – Hawaii Council Meeting hosted by Honolulu Association of Insurance Professionals and presided by Council Director Martin Beardeaux, CPCU, AIDA, ARM-E, AINS. It will be a virtual meeting at 11:30 HST.

It will soon be winter. As you walk about you feel that crisp air around you and you will notice that it is

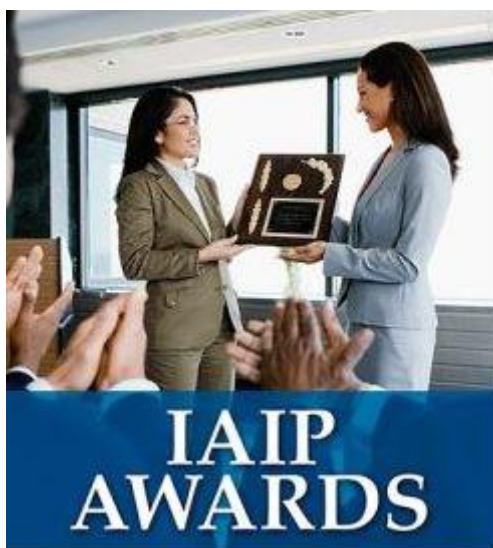
getting darker earlier. Those that travel, work late, or attend evening events please be aware of your surroundings. For your safety, if attending meetings or events, if you can, be in a pair or group. Park in a lighted area. Don't fumble looking for your keys, have them ready. Take care of you!!!

In Fellowship,

Christine

Christine Chandler Tillett, aPHR, CLP, CDP, CRIS, TRIP, MLIS, CIIP

Leadership Education Achievement Development



It's your time to shine! Submit your application for an IAIP award today! And encourage your peers and members to apply as well.

Award categories include: Insurance Professional of the Year - Claims Professional of the Year - Client Service Professional of the Year - Risk Management Professional of the Year - Professional Underwriter of the Year - Rookie of the Year - Young New Professional of the Year - CWC Speak-Off Award applications are due on November 15 to your Regional Vice President. Deadline to submit is 11:59 pm at the submitting members time zone.

Award applications are first reviewed at the regional level. The regional winners compete for the international award to be announced at the 2023 International Convention in June.

EC CONNECTION



Greetings from your IAIP Board of Directors!

With Fall upon us, it brings about Council meetings for many and deadlines to keep up with. We want you to get the most out of your IAIP membership, and are here to assist you in any way we can.

If you have a Council in your state, we hope you are finally able to meet in-person and enjoy the educational opportunities and fellowship with your fellow IAIP members. For those States that do not have a Council, please join us on November 16th at 1:00 for the Town Hall meeting where Diane and I will cover the State of the Association. This is the same presentation that the RVP's will be delivering at the Council meetings.

Hopefully you were able to join us for the Virtual Town Hall meeting on September 28th where we discussed the upcoming awards deadline. If you missed it, you can review the recording under the Town Hall meetings on our website. Don't forget the deadline is November 15th at 11:59 pm in your time zone. Why not celebrate what you have accomplished in IAIP and get recognized for all your accomplishments. Remember the winners of the regional awards will compete for the International Awards.

The Educational Task Force and the Meeting Expectations staff have been working diligently to get our Learning Management System and the CLP-A classes ready to launch. We are getting very close to launching this new program that transforms the old self-study classes into an exciting environment for individuals to review the materials. More to come on this exciting initiative.

The Mastermind groups are getting ready to launch again, I hope you will sign up to be involved in one of the groups. It's a great way to share ideas, ask

questions and learn more about your fellow IAIP members and our industry.

Don't forget to check out our new Member Orientation Video! It's a great way for new members to learn more about our association and a great refresher for our current members.

Just a few deadlines to keep in mind that are coming up quickly:

- Awards applications are due November 15th to your RVP
- 990 – N Forms are due for all local association and councils
- Candidate applications due December 1st for
 - International Secretary
 - Legacy Foundation Directors-At-Large
 - International Nominating Committee
 - Regional Nominating Committee
 - Regional CWC applications due December 10th

Your Board of Directors are busy working for you and trying to bring new and exciting things to our members. Remember you get out what you put into your membership. Take advantage of the benefits we have to offer and encourage others to join our association or invite someone who use to be a member back to see what we have accomplished over the last few years. Get involved, we have several task forces that you can join to assist us with enhancing our association. We need your talents and support!

Yours in fellowship,

Tammy Wascher CIC, CIIP, CPIA, CLP, DAE
International President Elect

LINKS

[Int'l Association of Insurance Professionals](#)

<http://iaipregion7.org>



07-01-2022 to 09-30-2022

WELCOME
NEW & RETURNING MEMBERS!

Elena Bolino
Brian Davies
Spencer Lau
Denton Pang
Dallas Pietak
Cathy Wilson

NEW
DESIGNATIONS

Please let us know if you have earned a new designation. We would love to share.

IAIP Education & Events Calendar

11/7/2022 & 11/8/2022	Advanced CLP Virtual: Systems Thinking
11/7/2023	YNP-SIC – Smart Homes
11/15/2022 (due by 11:59 PM at submitting member's time zone)	International Award submissions due to the RVP
1/9/2023 & 1/11/2023	Advanced CLP – Virtual: Skillful Collaboration

Regional Directors

Education Director:

Keri Herlong, CPCU, CIC, CRM, CISR, ACSR, AIM, CIIP, CLP, CRIS, DAE

Marketing Director:

Regina Lemanowicz, CLP

Membership Director:

Sarah Jane Jara, CLP

Member At Large Director:

Terri Brennan

Council Directors

CA Council Director:

Dawn Manzano, CISR, CLP, CIIP

Hawaii Council Director:

Martin Beardeaux, AIDA, ARM-E, AINS

Virtual Town Halls

November 16, 2022

January 25, 2023

February 22, 2023

April 26, 2023

<https://www.internationalinsuranceprofessionals.org/>



POOLSIDE CHAT WITH THE RVP & TEAM

December 15, 2022

February 16, 2023

April 20, 2023

June 15, 2023

Join us for important updates, regional news and time to chat with members.

Share the News

2023 IAIP Convention
June 23-25, 2023
Providence, Rhode Island

The 2023 IAIP International Convention offers a multitude of corporate opportunities for sponsorship, partnership and showcasing your company as an exhibitor.

Find out more in the Convention Prospectus and be sure to share it with your company's decision makers. Don't miss this opportunity to get your company in front of hundreds of insurance professionals.

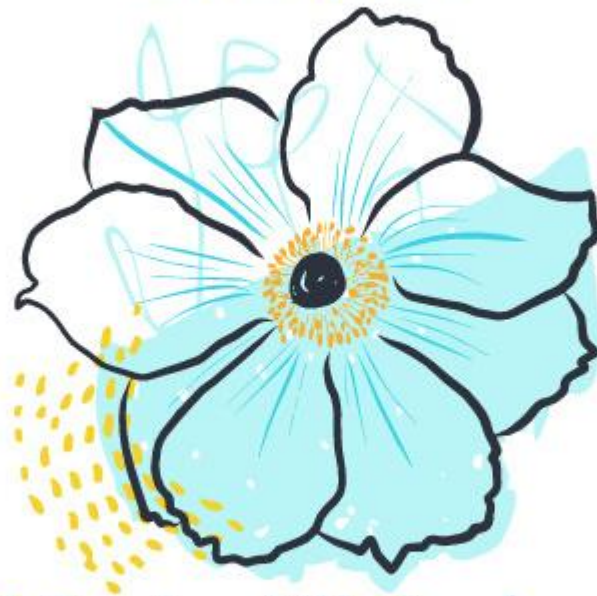


REGISTRATION IS OPEN!

For additional details, agenda, hotel reservations and registration form please visit the website at www.hapro.biz/region7conference

Return to Paradise

In 2023



IAIP Region VII Conference
April 27-29
Honolulu, Hawaii

www.hapro.biz/region7conference



- Snorkeling

- Whale/Dolphin Watching

- Parasailing/
Kayaking
Paddleboarding

- Helicopter Tours

- Surfing Lessons



OAHU ACTIVITIES & EXCURSIONS

Things to do while on Oahu

We recommend that you utilize the concierge service offered by the host hotel, Prince Waikiki. The concierge will recommend preferred vendors, provide costs, details of event, and will make reservations for you and your party. Concierge Service 808-944-4423 available Mon-Sat 8:00AM-4:00PM HST

Popular Attractions on Oahu:

- Pearl Harbor ▪ Waikiki Atlantis Submarine ▪ Sea Life Park
- Honolulu Zoo ▪ Bishop Museum ▪ Polynesian Cultural Center
- Dole Plantation ▪ Honolulu Aquarium ▪ Kualoa Ranch

JOIN US FOR

SUNSET IN PARADISE

FRIDAY APRIL 28, 2023

6 PM – 9 PM

PRINCE WAIKIKI – MULIWAI DECK

Live Hawaiian Music

Hula Dance Off

Food (Heavy Pupu's) / Drinks (No Host Bar)

Aloha Wear Contest

~ Best Vintage Aloha Wear

~ Funniest Aloha Wear

~ Best Magnum PI Aloha Wear



Important Bulk Email Change

The process for sending bulk emails (with an attachment) to a group of IAIP members, such as all members in one council or region, is changing.

Starting November 1, you will no longer need staff review/approval of emails before they are distributed to an audience larger than your local association. Once an email is submitted it will immediately be sent to your chosen audience.

If you want to send a bulk message that includes an attachment to a group you can find the new instructions here. Please note: only one attachment will be permitted per email, starting November 1.

If you want to send a bulk email that does **not include an attachment**, continue the process as you have always done by using the "email all group members" feature.

Starting November 1, bulk email requests will not be monitored. This means if you send a bulk email, it will automatically go out once you click send. If you want to include an attachment as a link to an email, you must do so on your own or [follow the new instructions](#) for sending a bulk message.

[How to send a message with an attachment](#)

[How to send an email - no attachment](#)

Tax Filing: Form 990-N

All IAIP local associations are required to submit Tax Form 990-N. This is an easy, online filing process for tax-exempt organizations whose annual gross receipts are normally \$50,000 or less. The form must be completed by November 15th.

The Form 990-N electronic-filing system can be completed through the [IRS.gov](https://www.irs.gov) website. All filers must register at IRS.gov prior to filing their next Form 990-N.

Please note this recent change: The IRS has started using a multi-factor authentication format. They are now requiring a copy of the front and back of your driver's license to verify your ID. One service you can use to accomplish this authentication is [ID.me](https://www.id.me) which is a service that verifies your identification efforts.

Eight items of basic information are required to complete the filing.

1. Employer identification number (EIN), also known as a Taxpayer Identification Number (TIN).
2. Tax year: July 1, 2021 - June 30, 2022
- 3 Legal name and mailing address: NATIONAL ASSOCIATION OF INSURANCE WOMEN
4. Any other names the organization uses: current local association name
5. Name and address of a principal officer
6. Web site address if the organization has one
7. Confirmation that the organization's annual gross receipts are \$50,000 or less
8. If applicable, a statement that the organization has terminated or is terminating (going out of business)

If you need any assistance with this process or locating any of the information pertaining to your local association, please contact [Amanda Hammerli](#), Executive Director.

Region VII Directors



Education Director

Since our new term started on July 1, IAIP has offered four CLP-A courses. Region VII members have stepped up to the plate to attend, teach, and moderate these classes, so thank you all for your efforts and enthusiasm! The excitement for the new designation is burning hot, and IAIP is keeping the fire burning with three more scheduled through February 2023 and other regions hosting these classes, as well. I know many of our members have earning the CLP-A designation as a goal for 2023 (myself included). It's going to be wonderful to see so many new designees stand up for recognition at the 2023 International Convention!

We are excited to be the host Region for Virtual CWC - co-taught by Sandy Malone and Keri Herlong. We have seven attendees at this course, which will be wrapping up soon.



Marketing Director

The Learning Management System is nearing the final stage! Many CLP, CLP renewal, and CLP-A courses have been recorded and are currently in the testing and refinement stage. I know we all can't wait for this to go live!

Be sure you are checking the IAIP and Region VII calendars regularly, so you don't miss out on any classes offered by other regions, and watch for your monthly emails with Region VII educational opportunities.

As always, if you know of any classes that are not being promoted, reach out to your Region VII Education Director or Liaisons.

#GoAllIn!

Region VII Education Director: Keri Herlong, CPCU, CIC, CRM, CISR, ACSR, AIM, CIIP, CLP, DAE, CRIS

Region VII Education Liaison : Martha Nobriga, CPIW, CPSR

Region VII Education Liaison: Gina Thomas Patterson, CISR-Elite, CPIW, CLP, DAE

What is Marketing? Marketing is the activity and processes for creating, communicating, delivering, and exchanging offerings that have value.

Region VII is very active and committed to the process of creating and delivering value to its members. We believe in communication and

exchanging ideas and we know membership in IAIP is rewarding and lifelong friendships are made.

As your Marketing team, Chenise and I are dedicated to helping members make the most of the tools that are available. One of the best tools IAIP offers is the Marketing Toolkit. This toolkit is packed with valuable information.

Does your association have its own IAIP logo? Need to know how to send a bulk email through the International website? Want to learn how to set up your association website? Thinking about starting or updating your newsletter? Need tips on marketing programs? Want to give your employer information on what IAIP is all about? What about 90 Ways to Keep your Members?

You can find all this information and so much more in the Marketing Toolkit. Log onto the international

website, members only, leader resources and check out the toolkit.

<https://www.internationalinsuranceprofessionals.org/page/LeaderResourceTool#marketing>

Another marketing tool is to send us your meetings and events so we may post them on the Region VII social media pages and our website.

Be an example every day of the caliber of Insurance Professional IAIP proudly boasts as members...Share your knowledge ... Mentor others...Demonstrate the benefits of IAIP...Share an invitation to an IAIP class or webinar...Demonstrate ethical behavior.

In fellowship,

Region VII Marketing Director: Regina Lemanowicz, CLP

Region VII Marketing Liaison: Chenise Blalock



Membership Director

IAIP Region VII Membership Contest

Runs from July 1, 2022 to Jan 31, 2023
How many ways can YOU enter to win?

<p><u>Recruit Individual Members:</u></p> <p>➔ NEW members – 1 ticket ea.</p> <p>➔ NON-RENEWED members – 3 tickets ea. (Lapse must be 60 days or more)</p> <p>➔ <u>Corporate Partner/Member:</u> 1 ticket & Chance to win Registration to 2023 International Convention</p>	<p><u>Convention Sponsor:</u> ➔ 1 ticket & Chance to win Registration to 2023 Regional Conference in Hawaii</p> <p>➔ <u>Talent Development:</u> 1 ticket & Chance to win \$300. towards Airfare to 2023 Regional Conference</p> <p>➔ <u>Special Recognition for Member that recruits the most members (new or renewal)</u></p>
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Spin the Wheel Prizes include:
\$100 Gift Card
\$200 Gift Card

For additional details please contact:
Sarah Jane Jara: SarahJane.Jara@redbull.com or
Terri Brennan: TerriBrennan@gmail.com or Terri.Brennan@Nationwide.com

Sarah Jane Jara, CLP- Membership Director
Membership Team

Sandy Malone, CLP, CISR, ACSR, DTM, CWC, Membership Liaison

Annette Ing-Firmeza, Membership Liaison

Mark Coberly, Membership Liaison



Members at Large Director

Hello Region VII Members!!!

Can you believe it's almost November! Don't forget the clocks fall back for daylight savings time in less than two weeks!!!(Except in AZ and HI)

We only had two members respond to my request for Community Service Project ideas announced in our last newsletter, and the winner of the \$25.00 gift card is Keri Herlong. Congrats!

Also a big 'Thank You' to the Region VII MAL Members that responded to my email asking for: (3) things that would help the Association keep MAL's engaged. If others would like to provide responses... please let me know. Your opinion is important to us!!

Wishing everyone a very Blessed Thanksgiving.

In Fellowship,

Terri Brennan, Region VII MAL Director.

MAL Liaison's:

Micheal Bonham, CIC, CPIW and

Kelly Reese, AU-M



We Miss You – We Want

ASK YOURSELF THESE THREE QUESTIONS AND CALL A FORMER MEMBER AND HAVE A CHAT! TELL A POTENTIAL MEMBER WHAT IAIP HAS TO OFFER.

Sarah Jane Jara, CLP – Membership Director

Q: What one change or improvement has IAIP made recently that has been the most beneficial to your membership?

A: One new improvement that IAIP has made recently that is most beneficial to my membership are the updates to the website with the online learning tools.

Q: What's new with IAIP that a former member might not know about?

A: IAIP is trying new things to improve your member experience, such as coming up with innovative ways for us to be able to have our council and regional meeting, including a HUB model to cut down on travel expenses. However, we are headed to Honolulu for Regional in 2023!

Q: What do you feel is the best reason for a former member to come back?

A: I feel the best reason for a former member to come back would be for them to experience what is new and hopefully find a revived association with so much support to see everyone succeed professionally and personally.

Mark Coberly – Membership Liaison

Q: What one change or improvement has IAIP made recently that has been the most beneficial to your membership?

A: I don't know that it is necessarily an "improvement" but the fact that the Region VII Conference was a "hub" with the national convention afforded me the ability to attend both the Regional conference and the convention, which usually I can only afford to do one in the year.

Q: What's new with IAIP that a former member might not know about?

A: There is no longer the publication of the association's magazine, Today's Insurance Professional, which has been replaced with a blog. This new format makes it easier for members to contribute to the association by sharing their story.

Q: What do you feel is the best reason for a former member to come back?

A: I view it as a reciprocal relationship, as being a member of the association provides opportunities to serve in a leadership role on a local, regional, or even international level, which strengthens one's leadership skills. And the association certainly benefits from having former members whose experience and knowledge benefits newer and potential members.

Sandy Malone, CIC, CIIP, CISR, ACSR, CLP, CWC, DTM – Membership Liaison

Q: What one change or improvement has IAIP made recently that has been the most beneficial to your membership?

A: The educational programs are being updated all the time, the updates and changes help keep us current and our education relevant.

Q: What's new with IAIP that a former member might not know about?

A: Advanced CLP E-Learning is an awesome addition to the already numerous education opportunities.

Q: What do you feel is the best reason for a former member to come back?

A: Friendship, networking, and knowledge. Former members can reconnect and feel valued by mentoring both new and current members.

**JOIN OR
RENEW
TODAY**

IAIP Program Links:



Already earned your CLP but want to advance your leadership skills even further? Continue to develop your inner leader with the IAIP's Advanced Certified Leadership Program. [Learn how you can earn your CLP-A.](#)



Connect, share and learn from IAIP members from across the country interested in similar aspects of the industry. Browse our dynamic topic options and choose one or more to join today. [Find out more.](#)



[FOUNDATION WEBSITE](#)



[Corporate Partner Program](#)

[CORPORATE TALENT DEVELOPMENT](#) - WE MAKE DEVELOPING YOUR TEAM EASY

IAIP CAREER CENTER

[CAREER RESOURCES](#)



[BECOME A MEMBER](#)



[SEARCH RESUMES](#)





I became a member of this association in 2005. My company at the time supported me with my membership dues and education days so I could attend Council Meetings. I felt if they could support me financially in this manner then I would always invest in myself through NAIW educational offerings. My work experience is more personal lines underwriting in nature, auto and home products, so learning about commercial lines, inland marine and claims has always been very interesting for me.

I became Education chair of my local association and offered courses so they could earn their CPIW/M and DAE designations. One course that I encouraged members to take was Confidence While Communicating, CWC. I was so convincing I decided to take it myself. The course taught me so much! It is more than just a competition class. I had the opportunity to present information to my companies executives, CWC provided me with the right tools I needed. You learn how to gather your thoughts in an orderly manner to create a meaningful presentation, to have confidence in yourself while presenting and prepare yourself for the questions and answers portion at the end.

My father passed away quite suddenly and unexpected in January of this year. None of my siblings felt comfortable speaking at his services. I had the great pleasure to share my Dad's "dash" to friends and family. I know I could not have done it as well if I had not had the tools from my CWC toolbox.

You never know what impact an educational course will have on your life. There are so many courses that are offered by the association, some will help you advance your career while others might spark a change in your career path.

I encourage you to consider applying for a Legacy Foundation Scholarship in 2023. Invest and believe in yourself, give yourself the right tools in your toolbox so you are prepared for whatever life brings your way.

Linda Grayless
Legacy Foundation

[DONATE TODAY](#)