



New Jersey Chapter

Annual Meeting Recognizing Past
Presidents and New Designees

June 3, 2020

Agenda



- Networking and introductions
- Awards
- Chapter Annual Business meeting
 - Recap of 2019
 - Leadership Council Insights
 - Election of 2021 Officers

- Past Presidents
- Board Members
- New Designees – Class of 2020
- Candidate Members



2020 Board Members



- *Laura Panesso, CPCU* President
- *Matthew Struck, CPCU* Immediate Past President
- *Rick Cerrato, CPCU* Vice President
- *Lynn Roberts, CPCU* Communications
- *Willie Jackson, CPCU* Secretary

2020 Board Members



Directors

Terrance Harvey, CPCU, New Designee Rep

Ozelia Gray, CPCU

Rich Morales, CPCU, Social Media

Miranda Rodriguez, CPCU

Rita Williams-Bogar, CPCU, Executive Director

State of the Chapter



- Continued to operate within the scope of the mission
- *The New Jersey Chapter of the CPCU Society is dedicated to the professional practice of property and casualty insurance and promotes the highest ethical, educational, and service standards to enhance the stature of the CPCU designation.*

Accomplishments and Initiatives



- Circle of Excellence **Platinum** Level (TBD)
- Maintained Financial Stability
- Continued Member Engagement
- Increased focus on networking
- Successful I-Day w/Central Jersey Chapter
- Virtual Ethics Educational Event in March

2019 Initiatives



- Marketing & Recruitment – Grass Roots, Social Media, & Collaborations
- Commitment to DOBI & CPCU CE's
- Corporate Champions – Grow the Chapter & Promote the Designation
- Collegiate Collaboration – Cultivate Future Insurance Leaders
 - St. Peter's University
 - VEI – Advisory Board and Business Plan Judging
- Community Involvement
 - Sierra House

Education – I-Day 2019



Based on attendee feedback, the I-Day format was revamped to follow a conference setting.

- Making Ethical Decisions – 3 CEs*
- Coverage Language Conflicts – 2 CEs*
- Cyber Attacks Panel 2 CEs*
- Compliance Panel 1 CE*
- Effective Negotiation Skills*
- Hiring & Retaining Millennials*

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2019 I-Day Survey Results



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Local Promotions

- Promoting CPCU locally
 - Continue community outreach to get the word out
 - Encouraged Local Champions to post information on site
 - Engaging students at St. Peter's University

- Good Works
 - Volunteer activities at Sierra House



Engagement

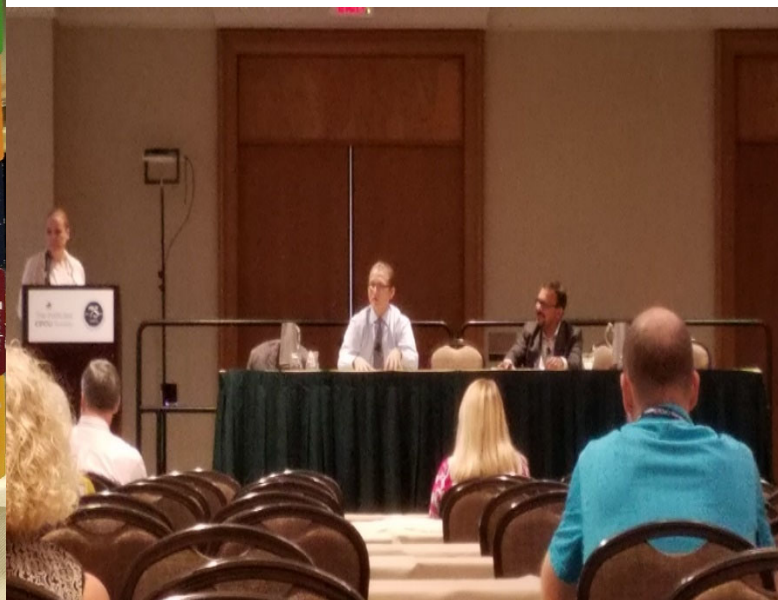
Communicated via CPCU Chaptergram, LinkedIn Facebook, Instagram, and Twitter

Sent chapter leaders to 2019 Annual Meeting in New Orleans

Sent chapter leaders to CPCU Society's Leadership Summit

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Leadership Summit

- Originally scheduled for Portland, OR in April 2020.



- An inside-out view of how the Society works with insurance professionals in upholding the high standards in the industry.
- Training for chapter leaders and leaders in general
- April 29 - May 1, 2021 – Portland, OR

Leadership Summit



- Develop your Leadership skills
- Priceless networking opportunities -like being at the CPCU Annual Meeting but with a much smaller with an intimate group
- Personal contact with leadership at the Society as well as CPCUs from around the world
- Collaboration with Interest Groups

Membership



- Membership in the CPCU Society provides you with opportunities to:
- Network with industry leaders.
- Earn continuing education credits, strengthen your professional skills
- Participate in leadership training, and much more.
- It's everything you need to put your career on the fast track.

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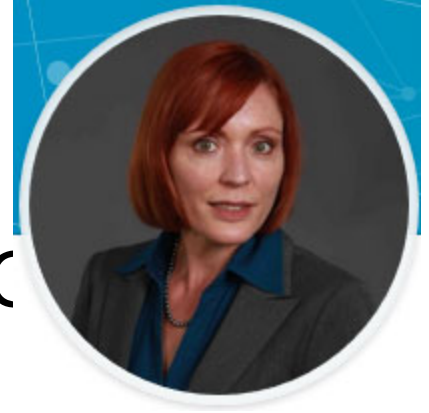


Social Media and Web

- Chapter web site
 - <http://newjersey.cpcusociety.org/>
- LinkedIn Group: CPCU Society New Jersey Chapter
 - <https://www.linkedin.com/groups?gid=3903188>
- Twitter @NewJerseyCPCUs
- Facebook Page
 - <http://www.facebook.com/NewJerseyCPCUSociety>
- Instagram
 - Search for NJCPCU on #Insta to connect

Ratification of 2021 Officers

- President – Laura Panesso, CPCU



- President-Elect – Rick Cerrato, CPCU

- Secretary – Willie F. Jackson, CPCU

Terms of office Jan. 1, 2021 to Dec. 31, 2021

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Two NJ Chapter leaders will be presenting Annual Meeting Sessions

Laura Panesso, CPCU – **Game On – The America History Edition**

Rita Williams-Bogar, CPCU

**Lead with a Human Touch in an Age of AI, Machine Learning, and Data
Preserving Reputation –Ethical Opportunities for Leaders**

UPCOMING EVENTS



Education and
Networking with IDMA,
TBD 2020

*52nd Annual I-Day –
Virtual
Date TBD – Change
image*





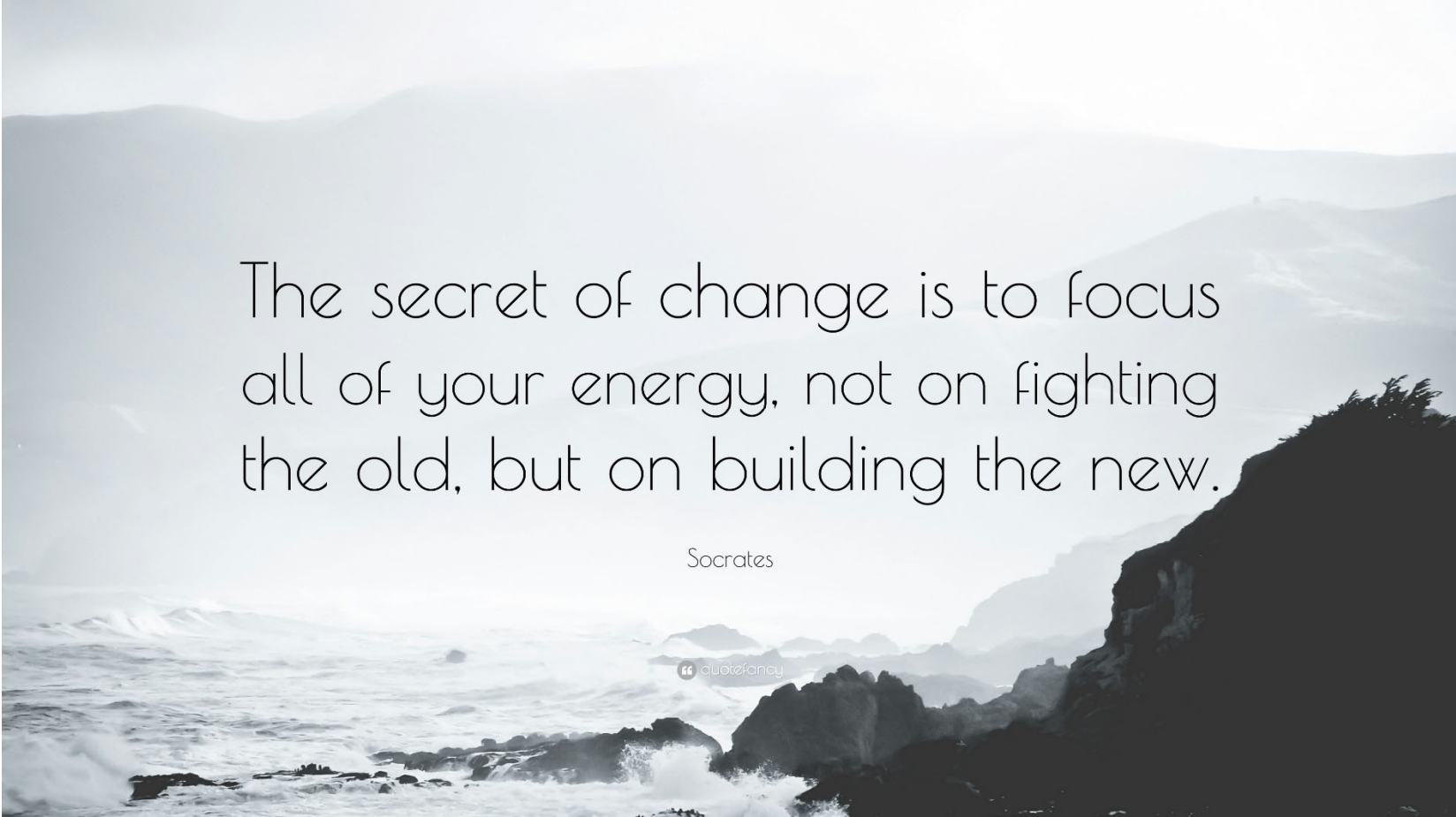
- *January/February 2021 Kickoff*
- *March 2021 – Ethics Awareness*
- *April 2021 – Leadership Summit – Portland, Oregon*
- *June 2021 – Annual Meeting & Recognition Breakfast*

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- Task focused
- Liaison to other organizations
- Champion within your organization
- Interest Group Liaison
- Social Media Chair



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A scenic landscape featuring a rocky coastline in the foreground with waves crashing against the shore. In the background, there are rolling hills and mountains under a hazy, overcast sky. The overall tone is muted and atmospheric.

The secret of change is to focus
all of your energy, not on fighting
the old, but on building the new.

Socrates

“ quote fancy

Contact



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