



New Jersey Chapter

Annual Meeting Recognizing Past
Presidents and New Designees

June 9, 2021

Agenda

- Networking and introductions
- Recognition
- Chapter Annual Business meeting
 - ▣ Recap of 2020
 - ▣ CPCU Society Update
 - Leadership Council Insights
 - ▣ Election of 2022 Officers

- Past Presidents
- Board Members
- New Designees – Class of 2021
- Candidate Members



2020 Officers

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

2020 Board Members

Directors

Terrance Harvey, CPCU, New Designee Rep

Lynn Roberts, CPCU, Communications

Rich Morales, CPCU, Social Media

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
- Maintained Financial Stability
- Continued Member Engagement
- Increased Focus on Networking
- Successful I-Day w/Central Jersey Chapter
- Virtual Ethics Educational Event in March

2020 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

Engagement

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

Offered several educational opportunities

Engaged the next generation



Weekly Broadcast

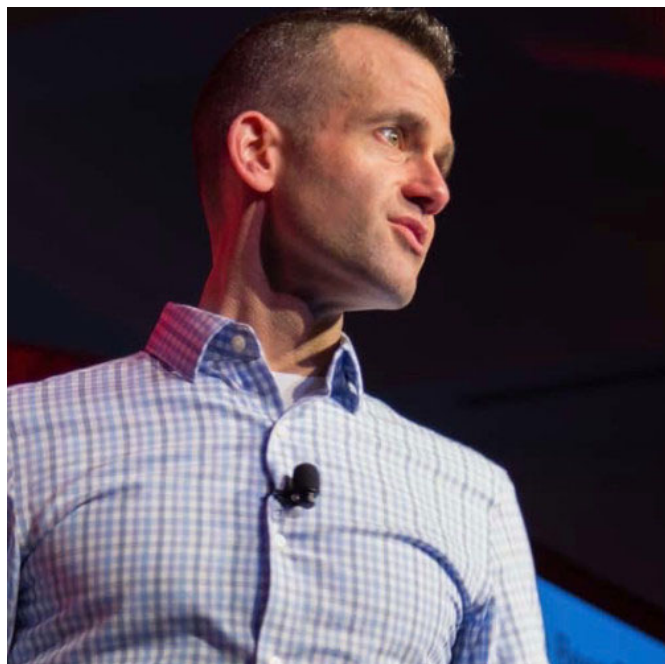


Matthew Struck

Heather Blevins

HOW TO CPCU

Featured Speakers – Co-Sponsored with Regional CPCU Society Chapters



**Bryan Falchuk, MBA,
CPT, BCS**

*Learn the Math to Make
Your Toughest Relationships
Work – August 20, 2020*

Amy C. Waninger, CPCU

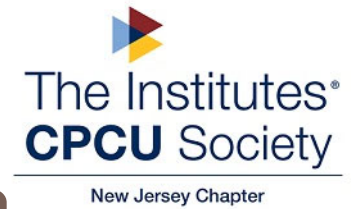
*Making Diversity a Competitive
Advantage for your Career
November 13, 2020*



Dr. Stephen Weisbart, CLU
Insurance Information Institute
Economist – September 17, 2020

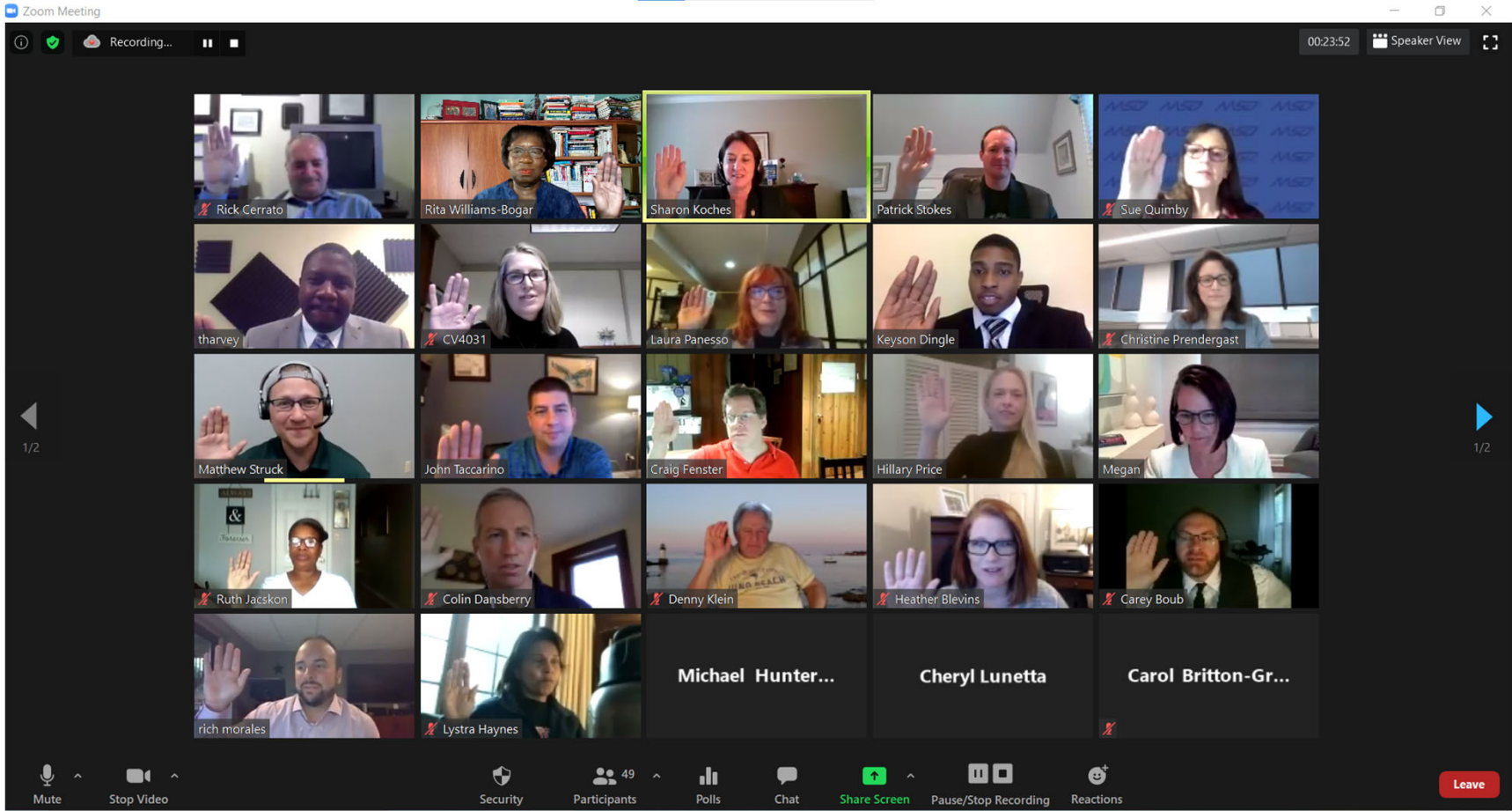


Co-Sponsored Diversity & Inclusion Movie and Conversation



CPCU Society New Jersey Chapter Annual Meeting Report June 9, 2021

I-Day 2020



CPCU Society New Jersey Chapter Annual Meeting Report June 9, 2021

I-Day 2020 Speakers



Abi Clough, MBA, CPCU



Carol Vorhees, CPCU, PMP



Christine Prendergast



Rita Williams-Bogar, MBA



Bryan Falchuk



Rob Galbraith, CPCU



Megan Watt



Patricia Saporito, CPCU



*Amy C. Waninger,
CPCU*



Matthew A. Struck, CPCU



Brett Kahn



James J. Venezia, CPCU



Patrick Kelahan



Stefan Holzberger, CPA

Education – I-Day 2020

First-ever virtual I-Day. Held over two days with multiple sessions, from professional development, industry topics, and CEs. People attended from around the world!

- ▣ *Networking Beyond Bias*
- ▣ *Making Ethical Decisions – 3 CEs*
- ▣ *COVID Steps, Mis-Steps, Perceptions, and the Future – 1 CE*
- ▣ *Data Analytics and Literacy 1 CE*



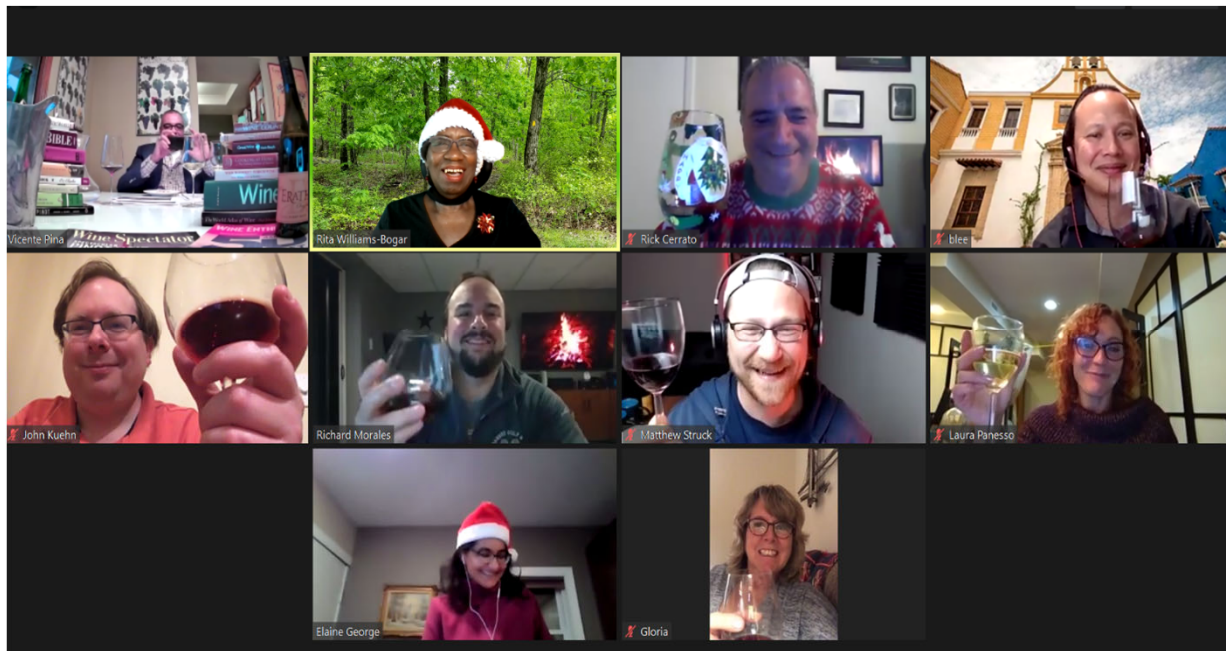
Education – I-Day 2020

- ▣ *Life After Leaping In*
- ▣ *The 10Cs Systemic Risk and Economic Response*
- ▣ *Personal Online Branding*
- ▣ *Carrier Innovation*
- ▣ *Leadership & Cultural Changes Needed for the Future of Insurance*



Holiday Networking Event

Virtual Wine Education and Tasting Presented by Vin de Vin
Wine Tasting and Collecting Consultants – December 3, 2020



Vin Pina, MBA, CSW



Education - March 2021

“Protecting Your Ethics”



Rita Williams-Bogar, MBA. CPCU, ChFC
March 23, 2021

Engaging the Next Generation



The slide features the logos for The Institutes CPCU Society New Jersey Chapter and Saint Peter's University. The text on the slide reads: "Insurance Industry Info Session at St. Peter's Virtual Career Fair" and "March 4, 2021". Below the slide is a video call interface showing five participants: a man in a light blue shirt, a woman with glasses in a dark blazer, a woman with red hair, a woman with glasses in a dark top, and a woman with long dark hair. The interface includes a red "End" button at the bottom right.



2021 Member Survey Results



[This Photo](#) by Unknown Author is licensed under [CC BY-NC-ND](#)

Highlights

- Members are interested in a variety of events with the top three being:
 - Emerging Issues Panel or Speaker (17)
 - Educational workshops for license CEs (15)
 - Leadership/Professional/Career Development (15)
- The preferred format is webinars. (18)
- Approximately half are interested in social events (14)
- Although any weekday works, most preferred afternoons, mid-week
- There are several topical areas of interest.
- No speakers were identified.



Highlights Continued

- The majority (62.96%) read the Chaptergram, though a few stated they never saw it. There were several comments, which can be inferred as suggestions. Two people recommended including a Data Puzzler with a \$25 gift card to the winner.
- Nine respondents indicated interest in volunteering, but only one provided contact information.
- The majority (66.67%) did not attend I-Day, primarily due to timing/conflicts. A few (4) said they did not hear about I-Day.
- The majority of respondents (61.54%) prefer I-Day 2021 to be hybrid.



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.

2021 CPCU Society Strategy

To Get Even Better...

- 1. Be the premier community of risk and insurance thought leaders**
- 2. Demonstrate (and communicate!) the value of CPCU Society membership**
- 3. Increase membership and grow our community**
- 4. Involve and engage members in social responsibility**



Welcome to INteract
Connect. Communicate.
Collaborate



- INteract connects members to 16,000+ fellow CPCU Society colleagues
- Designed to help you connect and engage with each other, which is more important now than ever;
- Finding an expert or a referral will be much easier with the new, robust member directory; and
- Society leadership, Chapters, Committees, and Interest Groups will all be able to communicate with members and collaborate on projects more easily.

Challenge to all CPCUs....

- **Lifelong learning opportunities**
- **Active Member**
- **Highest Ethical Standards**
- **Grow and Build our Community**
- **Forever Friends**
- **Be that POWER OF ONE**



Ratification of 2022 Officers

- President – Rick Cerrato, CPCU

- President-Elect – Rich Morales, CPCU

- Secretary – Willie F. Jackson, CPCU

Term of office Jan. 1, 2022 to Dec. 31, 2022

2021 Board Members

Directors

Frank Alansky, CPCU, Volunteer Recruitment & Development

Terrance Harvey, CPCU, New Designee Rep

Frank Alansky, CPCU & Gloria Mossberg, CPCU, Membership

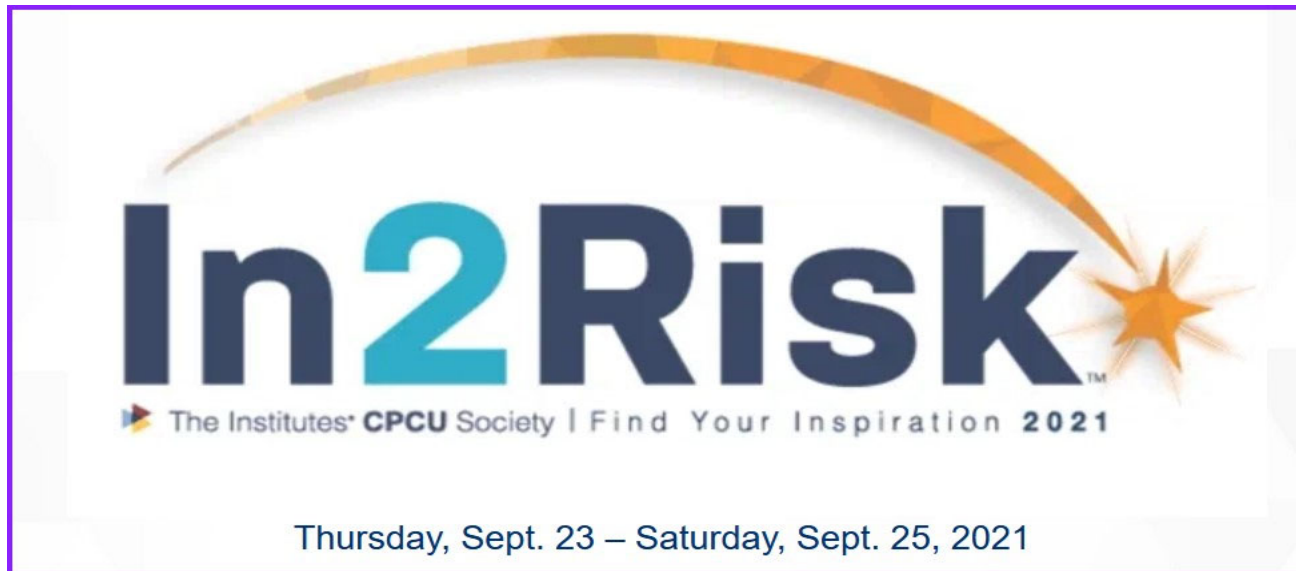
Lynn Roberts, CPCU & Rich Morales, CPCU

Communications and Social Media

Srinivasa Rao Tamma, CPCU, Webmaster

Farouk Yassine, CPCU Education

Rita Williams-Bogar, CPCU, Executive Director



Two NJ Chapter leaders will be presenting Annual Meeting Sessions

Laura Panesso, CPCU – **Game On – 2021 Limited Edition**

Rita Williams-Bogar, CPCU

- **What Does Normal look like after COVID-19?**
- **The Ethical Implications of Monitoring Remote Employees**

CPCU Society New Jersey Chapter Annual Meeting Report June 9, 2021

UPCOMING EVENTS



Networking Event - TBD

*53rd Annual I-Day – Virtual
October 14 & 15
With In-person Networking*



UPCOMING EVENTS

This Month

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

- *January/February 2022 - Kickoff*
- *March 2022 – Ethics Awareness*
- *June 2022 – Annual Meeting & Recognition Breakfast*

[This Photo](#) by Unknown Author is licensed under [CC BY-NC-ND](#)

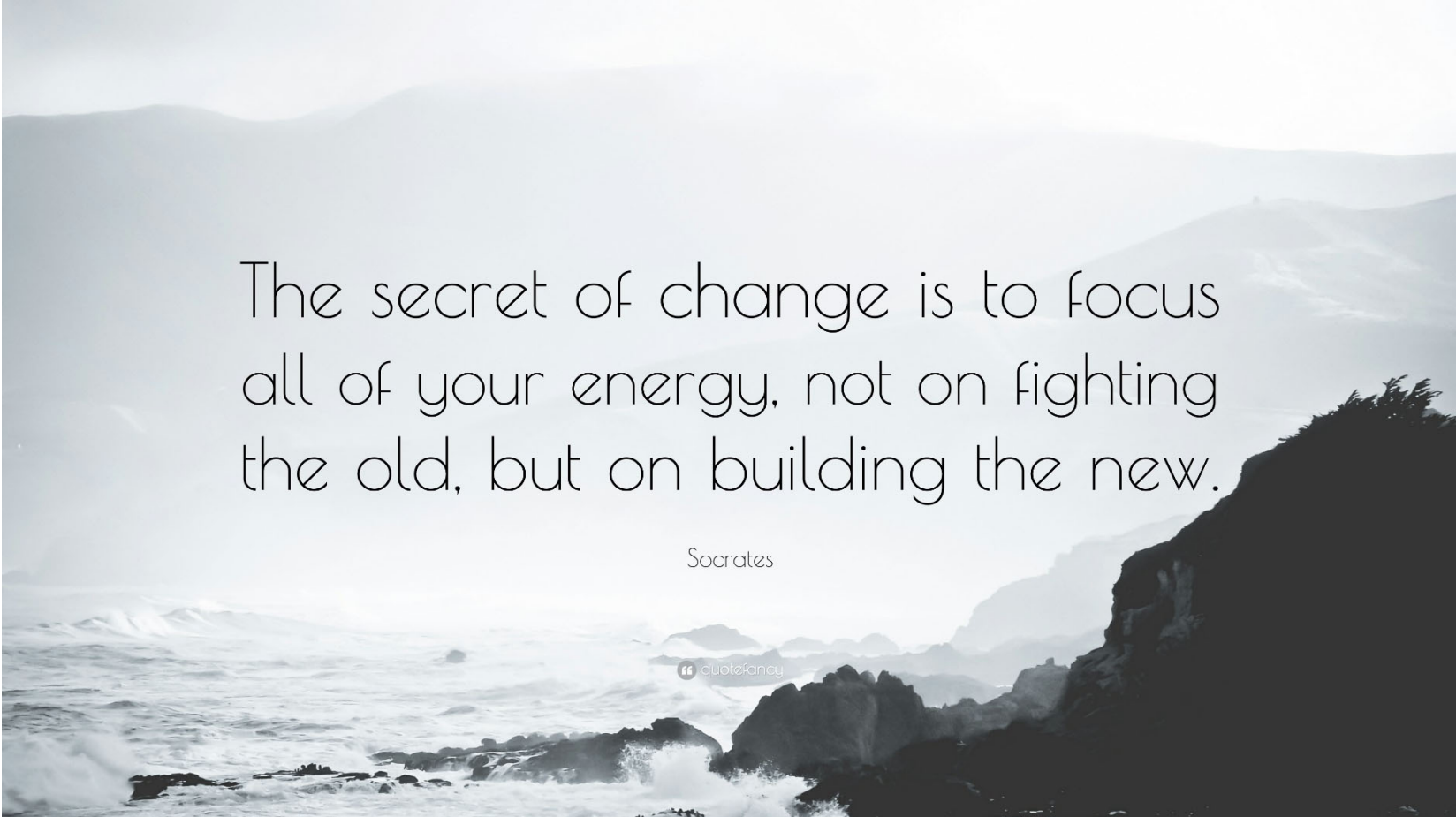
- Task focused
- Liaison to other organizations
- Champion within your organization
- Interest Group Liaison
- Social Media Chair



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

In closing....



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

Socrates

“ quotezancy

Contact

- Rita Williams-Bogar, CPCU
Executive Director
NJPCUExecDir@comcast.net
201-404-7960