

President's Forum



Matt Lennox, CPCU
Chapter President

Volunteer Spotlight

This month Tony Thelen, our Chapter's treasurer, is our volunteer in the spotlight!

Tony joined our board in 2018. As treasurer, Tony performs several key functions that ensure the financial success of our chapter, such as:

Preparing and presenting the financial statements at our board meetings	Filing annual tax forms
Preparing and presenting the annual budget to the board	Performing and reconciling all banking transactions
Preparing and submitting the financial statements to the Institutes	Reconciling our monthly luncheon registration lists

These tasks may seem simple from a high-level perspective, but I assure you they are not easy.

Tony is an administrator within the accounting division at Auto-Owners Insurance Company. He began his career with Auto-Owners in 1998 as an accountant and has held various positions in the company's accounting and internal audit divisions. Tony graduated from Central Michigan University with a bachelor's degree in accounting. He earned his CPCU in 2016 and also holds the AIAF, ARM, APA, ARC and several other designations.

Tony lives in Grand Ledge with his wife, Erin, and their two daughters, Zoey and Sadie.

"I volunteered to be on the board of directors this year to get more involved with the CPCU chapter and see what is all involved with being on the board," Tony said. "It has given me an opportunity to not only observe but participate in the decision-making processes that are done behind the scenes.

"It is amazing the time and commitment that the people on the board and the various committees put in to make our chapter so successful, and I am glad to be able to assist in some of those functions. I would encourage others to inquire in ways that they may get involved."

When you see Tony, please be sure to personally thank him for his time and commitment to our chapter. Tony, thank you for all your hard work and initiative to make sure our chapter's finances are in order.

Your 2018 Chapter Board

President:

Matt Lennox, CPCU

Treasurer:

Tony Thelen, CPCU

Directors:

Nicole Smith, CPCU

Olivia Edgar, CPCU

Vice President:

Laura Wood, CPCU

Secretary:

Jason Jerome, CPCU

Bryan Pung, CPCU

Meetings

March Speaker Spotlight



Dave Walker
President, Hartland Insurance Agency
Topic: Ethics

Dave Walker is the president of Hartland Insurance Agency in Hartland, which specializes in commercial insurance. The agency has offices in Highland, Hamburg and Flushing. He has been with Hartland since 1981.

Dave is a Certified Insurance Counselor, Accredited Advisor of Insurance, and a Licensed Insurance Counselor. He is on the board of directors for Rotary International, the president of the Independent Insurance Agents and Brokers of America, and is a board member for Fenton Area Schools.

Hartland Insurance Agency has been recognized by many in the insurance industry as a growing and respected insurance provider. Hartland Insurance is currently recognized by the Michigan Association of Insurance Agents as a Total Quality Agency.

Dave and his wife, Barbara, live in Fenton and have two grown children and two grandchildren.

Reserve Your Seat

Date: Monday, March 26, 2018

Where: The Crowne Plaza Lansing West

Time: 11:30 a.m.

Cost: \$25.00

Menu:

Flank Steak
 or
 Hawaiian Chicken

Contact: email Laura Wood at
 wood.laura@aoins.com

Please RSVP no later than 4:30 p.m. March 20, 2018

Future Chapter Meeting Dates

- Friday, April 20, 2018
- Wednesday, May 23, 2018

Mid-Michigan Chapter
CPCU Newsletter

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 September through June

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The submission
 deadline for the
 April newsletter is

April 2

If you know of promotions
 or other noteworthy ac-
 complishments involving
 CPCUs, please send them
 to the editor using any of
 contact methods listed.

Future CPCU Annual
Meeting Sites

2018 San Diego Oct. 13-16
 2019 New Orleans Sept. 21-24
 2020 Washington D.C. Oct. 3-6



Connect with us on LinkedIn at
Mid-Michigan CPCU Society

Past Meeting Highlights



Dr. Cheri Speier-Pero provided the Chapter with a great overview of the importance of data analytics, not only in the insurance industry but also in our everyday lives.

Chapter News

March Meeting to be Networking Lunch

In the “One Small Thing” survey, many of you asked to have a networking lunch that will allow you to get to know other CPCU members in our chapter. We are fortunate and have a large chapter with many members.

To lay the foundation and to avoid surprises, our March luncheon will be a networking lunch. Everyone will be assigned a table number at check in. We plan to have a list of questions at each table to assist as conversation starters. We hope you will find the networking lunch engaging and beneficial.

Ethics Awareness Month

Ethics Awareness Month is a time to celebrate our high ethical standards and share with our members different ideas and methods to convey this message.

CANON 1

Insurance professionals should endeavor to place the public interest above their own.

Rules of Professional Conduct

R1.1: A CPCU should avoid even the appearance of impropriety when performing his or her professional duties and should act in a manner that ultimately will best serve his or her own professional interests. However, potential conflicts of interest may arise, or may appear to arise, because many CPCUs simultaneously must balance multiple professional interests with their personal interests and the best interests of the general public. The ethical obligation to place the public interest above personal interests or financial gain extends to every CPCU, regardless of whether the CPCU’s occupational position requires direct contact with actual or prospective insurance consumers. This does not imply that insurance purchasers should be given preferential treatment over insurance claimants because the needs and best interests of insurance purchasers are in fact served only when all insurance claimants, including third-party liability claimants, are accorded prompt, equitable, and otherwise fair treatment.

Scholarship Opportunities

As many of you know, part of our Society’s commitment to promoting the insurance industry is offering scholarships annually to college students pursuing studies within the insurance field. For the 2018-2019 academic year, we will again be awarding scholarships of \$1,500 and \$1,000 to two students.

Applications are being accepted through May 30. If you have a qualifying intern within your company, know a college student who will be a junior or senior starting this fall, or a student pursuing their master’s degree, please let them know about our Chapter’s scholarship opportunity. This year, in addition to students pursuing studies within the insurance field, those with related majors may also apply if they have an internship or employment in the insurance industry.

If you have any questions or would like an application, please email Candace Trumble at Trumble.Candace@aoins.com.