

THE VIEW

JULY, 2007

NAIW INTERNATIONAL OFFICERS

International President
E. Faye Evans

International President Elect
Jenelle Duffy
CPCU, CLU, FLMI, HIA, CPIW, DAE

International Vice-President
Linda Wilson
AAI, CPIW

International Secretary
Margaret Wildi
CPCU, AIM, AAM, CPIW, DAE

~~~~~

Region IV Vice President  
Sue Shaw, CPIW

Assistant to  
Region IV Vice President  
Dottie Fuller  
CIC, CPIW



## LOCAL ASSOCIATION OFFICERS

President  
Barbi Charles, AAI  
502-326-4076  
[barbi\\_charles@wellsfargois.com](mailto:barbi_charles@wellsfargois.com)

President - Elect  
Ruth Ann Herzog  
502-326-4036  
[ruthann\\_herzog@wellsfargois.com](mailto:ruthann_herzog@wellsfargois.com)

Vice - President  
Kate Graeter  
502-423-1800  
[kgraeter@mfic.com](mailto:kgraeter@mfic.com)

Treasurer  
Rose Welker, AAI, AU  
502-326-4070  
[rose\\_welker@wellsfargois.com](mailto:rose_welker@wellsfargois.com)

Secretary  
Virginia Ditsler, AU, CPIW  
502-429-0477  
[vditsler@schmidtinsurance.com](mailto:vditsler@schmidtinsurance.com)

Immediate Past President  
Deborah Wade, CPIW  
502-585-3600  
[dwade@rhcgrouop.com](mailto:dwade@rhcgrouop.com)

**LOUISVILLE ASSOCIATION OF INSURANCE PROFESSIONALS**

**PLACE:** BRECKINRIDGE INN HOTEL  
2800 BRECKENRIDGE LANE

**DATE:** July 17, 2006

**TIME:** 5:00 PM Social Hour  
5:30 PM Dinner

**PROGRAM:** Fun Night--Bingo  
**WE ARE COLLECTING SCHOOL SUPPLIES FOR OUR LITTLE FOLKS  
WE HELP THROUGH THE LITERACY PROGRAM--PLEASE BRING  
SOME WITH YOU TO THE MEETING.**

**MENU:** Fried Chicken  
Scalloped Potatoes  
Country Style Green Beans  
Tossed Salad, Rolls & Butter  
Dessert--Chocolate Meringue Pie/Lemon Chess Pie

**COST:** \$14.00 RESERVATION - \$15.00 AT THE DOOR

PLEASE RETURN THE BOTTOM PORTION OF THIS NOTICE BY **7/13/07**

**TO:** LOUISVILLE ASSOCIATION OF INSURANCE PROFESSIONALS  
P.O. BOX 24508  
LOUISVILLE, KY 40224-0508  
Or  
CONTACT KATE GRAETER  
PHONE: 339-5934  
FAX: 410-6717  
E-MAIL: kgraeter@mfic.com

---

**MEMBER'S NAME** \_\_\_\_\_  
**GUEST'S NAME** \_\_\_\_\_

## **JOB OPPORTUNITIES**

### **WELLS FARGO INSURANCE SERVICES OF KENTUCKY, INC.**

A full-time position is available as a Medical Unit Cam (Commercial Lines Rep 2) at Wells Fargo Insurance Services of Kentucky at 950 Breckenridge Lane, Suite 50, Louisville, KY 40207. The job description includes being responsible for servicing and maintaining client accounts, evaluating potential exposures and appropriate coverages, and coordinating work flow.

Duties include: Preparing proposals, ordering and/or processing of binders, policies, certificates of insurance, and endorsements; marketing client accounts and negotiating with company underwriters on client's behalf; checking policy coverages, endorsements, rating calculations; invoicing; completing required checklists and any other mandatory forms or letters; maintaining files and inputting policy detail in computer system; resolving policy and coverage related concerns for clients and carriers; assist producer as necessary.

Minimum qualifications are: Must have 5 Years Commercial Lines Experience; P&C license required; knowledge of Microsoft products including Word and Excel.

Preferred Skills: Knowledge of AS400 is a plus. Have or working toward other insurance designation.

Apply on line at [www.wellsfargo.com](http://www.wellsfargo.com). At the bottom of the screen click on Careers; next screen click on Find a Job and enter requisition #3138373; select Kentucky, and then Louisville and click on Commercial Lines Rep 2 and click to apply on line.

---

### **WELLS FARGO INSURANCE SERVICES OF KENTUCKY, INC.**

A full-time position is available as a Commercial Cam (Commercial Lines Rep 2) at Wells Fargo Insurance Services of Kentucky at 950 Breckenridge Lane, Suite 50, Louisville, KY 40207. The job description includes being responsible for servicing and maintaining client accounts, evaluating potential exposures and appropriate coverage's, and coordinating work flow.

Duties include: Preparing proposals, ordering and/or processing of binders, policies, certificates of insurance, and endorsements; marketing client accounts and negotiating with company underwriters on client's behalf; checking policy coverage's, endorsements, rating calculations; invoicing; completing required checklists and any other mandatory forms or letters; maintaining files and inputting policy detail in computer system; resolving policy and coverage related concerns for clients and carriers; assist producer as necessary.

Minimum qualifications are: Must Have 5 Years Commercial Lines Experience; P&C license required; knowledge of Microsoft products including Word and Excel.

Preferred Skills: Knowledge of AS400 is a plus. Have or working toward other insurance designation.

Apply on line at [www.wellsfargo.com](http://www.wellsfargo.com). At the bottom of the screen click on Careers; next screen click on Find a Job and enter requisition #3138373; select Kentucky, and then Louisville and click on Commercial Lines Rep 2 and click to apply on line.

---

## **SMITH-MANUS**

Smith-Manus, the leader in specialty surety bonding, is seeking a professional to join our agency staff in Louisville, Kentucky. A full-time, salaried Bond Assistant position is available immediately. The company is seeking an experienced professional with surety bond knowledge to support our continued growth and national expansion. Competitive compensation and benefits package is available.

Responsibilities include: preparing surety bonds, communicating with customers via telephone, email, and fax, preparing and responding to correspondence as directed, maintaining current client files, working with an integrated, automated surety bond system (TABS), verifying bond rates, preparing and entering invoices, responding to customer inquiries, and maintaining bond files. This position requires close interaction with our team of bond producers and staff, as well as surety companies. All applicants must be detailed-oriented. A minimum of 3-years agency or company experience required. Additional information about our agency is available at [www.smithmanus.com](http://www.smithmanus.com).

Contact Jay O'Brien in Louisville at 502-238-1234 or forward a confidential resume to [jobrien@smithmanus.com](mailto:jobrien@smithmanus.com).

LAIP Meeting Minutes  
Breckenridge Inn  
June 19<sup>th</sup>, 2007

The meeting was called to order at 5:40 P.M.

The Collect was read by everyone present.

Deborah introduced our guests and they were invited to join the head table in the buffet line.

The program, "A Year in Review" was presented by Barbi Charles. Deborah reviewed the eight goals that she had set for the 2006-07 term. Barbi highlighted all of the LAIP events in the past year including our literacy program, the bunco fundraiser and May Appreciation Night. Michele reviewed the status of our new website that was available online this year.

There were no Minutes to review as the May meeting had been suspended.

Rose reviewed the job postings that were available. These will also be posted on the website

The treasurer's report was presented & read at the 5/2/07 board meeting and approved. Report will be filed for audit.

Deborah reminded everyone that the State Meeting will be in Lexington KY on 11/17/06 this year. The dates were changed due to availability of hotel rooms because of Keeneland and U of K basketball.

A motion was made and approved to suspend the August Meeting and have fun night as our July Meeting.

Meeting was adjourned at 6:28 P.M.

Respectfully Submitted,

Rose Welker, Secretary



*A special thanks to all my fellow Region IV members  
(and all NAIW members) who have sent e-mails or cards  
wishing me well as the 2007/08 National Secretary.*

*I appreciate your words of encouragement and endearment...I  
wouldn't be who I am without the support and friendship of  
each and every one of you!*

*Thanks! Margaret*

*Margaret Wildi, CPCU AIM AAM CPIW DAE  
Asst. Vice Pres. of Associate & Community Relations  
Grange Insurance Companies*



# *Thank You*

## *Region IV*

*You and NAIW hold the "Key" to my heart.*

*Thank you for allowing me to serve as Region IV Vice President for the past 2 years. What a great experience it has been as well a learning experience that I will never forget.*

*I have had the privilege of serving on two National Boards and have experienced first hand what it takes to make NAIW "My Association of Choice".*

*A special Thank you to my assistant, Lorene Friedman, who has been at my side for the past two years, she also has a passion for NAIW and it shows by the pride she takes it helping others.*

*We have had outstanding leadership from Gloria Bruno this past year and I know that NAIW members can be assured that Faye Evans continue the leadership role as our newly elected NAIW President.*

*I ask that you offer your support to our new RVP, Sue Shaw. When she calls on you to help, please answer her call.*

*In Friendship,  
Mary Stafford*

*Make new friends  
But keep the old  
One is silver and the other gold....*



Members and Guests,

What a wonderful meeting we had in June! We completed our annual “Year in Review” highlighting the many accomplishments of the Louisville Association of Insurance Professionals.

Our officers spoke, informed and challenged us to continue to participate, grow and ask others to join our association.

I am thankful for the many years that I have served as president of the Louisville Association of Insurance Professionals and look forward to the new leadership of Barbi Charles. I have had the opportunity to serve not only on the local, but the regional and the national levels as well and it all started from the local – from LAIP. I encourage you as a member to get involved and participate in the association’s functions, committees and educational opportunities. In the future we will have an opportunity to attend CE classes and achieve the programs needed to receive the CPIW & DAE both of which are NAIW’s designations for those who qualify.

At the June meeting, Incoming President Barbi Charles was presented with the president’s gravel, a symbol of leadership and power. Barbi will take over the leadership of the association on July 1<sup>st</sup>. I am sure under Barbi’s leadership, the Louisville Association of Insurance Professionals will continue to grow for many years to come!

In Fellowship,

*Deborah*

Deborah Wade, CPIW, CTM  
Immediate Past President - LAIP

## *JULY BIRTHDAYS*



*Ruth Ann Herzog – July 16*

*Carolyn Murphy – July 17*

*Janie Oaks – July 30*

Did we miss your birthday? If so, then that means you have not updated that information in our Membership Roster. If you would like to have your birthday recognized in our monthly newsletter, please get with your membership chairman for a roster update!

THANKS!

---

Note from the "Website Committee".....if anyone has any reports, articles, news of any kind for future website bulletins, please contact.....

Ruth Ann Herzog [ruthann\\_herzog@wellsfargois.com](mailto:ruthann_herzog@wellsfargois.com)

Mary Stafford [mary\\_stafford@wellsfargois.com](mailto:mary_stafford@wellsfargois.com)

**Submission deadline is the 3rd Thursday of each month**

Other NAIW websites

[www.naiw.org](http://www.naiw.org)

[www.naiwreg4.com](http://www.naiwreg4.com)

[www.ksaiw.org](http://www.ksaiw.org)

## Membership Information

Is your information published in the Membership Roster correct?

Has your company had a merger?

Please fill out the Change of Information form so you do not miss out on any of the LAIP e-mailings or any snail mailings.

Date of Change: \_\_\_\_\_

Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

\_\_\_\_\_

Employer: \_\_\_\_\_

Business Address: \_\_\_\_\_

\_\_\_\_\_

Home Phone: \_\_\_\_\_

Business Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Birthdate: \_\_\_\_\_

Preferred Mailing Address: Home: \_\_\_\_\_ Office: \_\_\_\_\_

If changing name, please indicate former name: \_\_\_\_\_

**Please complete and submit to:**

President-Elect  
Ruth Ann Herzog  
502-326-4036  
Ruthann\_herzog@wellsfargois.com