

78th Annual

North Carolina Association of Insurance Professionals Convention

November 1 – 2, 2019

**Discover, Learn, Engage
with NCAIP**

**Hilton Garden Inn Raleigh-Durham/Research Triangle Park
Durham, North Carolina**





***Welcome to the Research Triangle Park Region
and the 78th Annual North Carolina Association
of Insurance Professionals State Convention!***

The Triangle Insurance Professionals are excited to host the state convention in the Research Triangle Park Region which is named for the three hub cities of Raleigh, Durham, and Chapel Hill. The Research Triangle Park was founded in 1959 by leaders in academia, business and government and is the largest continuously operating research park in North America. It is well known for Discovery, Learning and Engagement just like our NCAIP State Convention.

We have many opportunities for you to discover, learn and engage which will add value to your leadership repertoire. To get started, we have been awarded a NAIW International Legacy Foundation grant to support the Certified Leadership Professional Course-Leadership 101 to be taught by Kelly Whitener. We are very appreciative of the Legacy Foundation's support. Or you may need CE credits, which you can obtain by attending "Hoarding-An Insurance Nightmare" to be taught by Chris Lupton. We will also have the CWC competition which highlights communication skills which are critical in any leadership role and the winner is sponsored by Johnson and Johnson to compete at the next level.

Our speakers will be enlightening, offering opportunities for practicing crisis management, problem solving, team management, strategic planning, and self-awareness. Keynote speaker Eric Schoolcraft, will take us on a simulated adventure requiring team decision making and problem solving during a crisis. Keynote speaker Dhiresha Marshall will show us the way in mastering difficult conversations at work and at home through self-awareness and brain based coaching. We will also have Mike Causey, North Carolina Commission of Insurance and State Fire Marshall, known for his perseverance, speak to us.

We also want to send out a big cheer of thanks to our sponsors and exhibitors. We appreciate their commitment and generosity in helping us to put on this state convention. NCAIP members always enjoy spending time with our sponsors and exhibitors during the conventions.

We hope you enjoy your state convention where you can discover, learn and engage for success. Thanks for coming!

Paula Burgess, ARM

NCAIP Council Director 2019-2020



North Carolina Association of Insurance Professionals



Welcome to the 78th annual convention of the North Carolina Association of Insurance Professionals!

Thank you for allowing me to attend your conference. It's so wonderful to connect with old friends and to see some new faces as well. I look forward to spending time with each of you. I especially welcome the first timers. You are beginning on a journey that will not only help with your professional growth, but also change your life completely.

I hope each of you will enjoy the many educational opportunities presented to you this weekend. The hoarding class is always an eye opening course to say the least and Leadership 101 is a great way to dip your toe into the leadership development courses IAIP has to offer.

I also hope you will enjoy your time together! Let's celebrate one another this weekend and enjoy the opportunity to fellowship. The best part of our conferences is the memories and friends made. This convention will only be as great as we let it be, so let's make it the best yet!

A big thank you as well to the hardworking members of the North Carolina Council for putting together this wonderful event for us! Putting together a convention is no easy task and they have done an exceptional job.

Again, thank you for allowing me to be here this weekend and for your dedication to IAIP.

Jessica Pruitt
Region II RVP



North Carolina Association of Insurance Professionals

NCAIP Convention Standing Rules

- Rule 1** All members attending the state meeting must register and pay fee. Admission to all sessions shall be by name badge only.
- Rule 2a** The Credentials committee, directly after the opening ceremonies of the business meeting, shall report the number of delegates registered as present with proper credentials.
- Rule 2b** A member registered as an alternate can, upon proper clearance by the Credentials committee, be transferred from alternate to delegate at any time during the continuance of the business meeting. A delegate may resume delegate status upon clearance by the Credentials committee.
- Rule 3** The Council Director shall appoint a committee of three (3) to approve the minutes of the meeting.
- Rule 4** All reports and other materials for inclusion in the minutes shall be typewritten and presented to the meeting secretary.
- Rule 5** Members shall be in their seats at least five (5) minutes before the scheduled meeting time. Delegates shall sit in their reserved section.
- Rule 6** Members wishing to speak shall, after going to the microphone and being recognized by the chair, give their name and association affiliation before proceeding to speak.
- Rule 7** No member shall speak in debate more than twice on the same question on the same day, or longer than three (3) minutes per speech, without permission of the assembly granted by a two-thirds (2/3) vote without debate. No debate on any issue shall exceed thirty (30) minutes.
- Rule 8** Any member in good standing may present motions or participate in discussion. Main motions and amendments shall be in writing, submitted in triplicate, signed by the maker and seconded, and shall be delivered to the meeting secretary immediately after being proposed. Only certified delegates or their alternates may vote.
- Rule 9** Any member in good standing may make nominations from the floor for any of the offices, provided that the nominee's willingness to serve has been obtained and the nominee has been endorsed by the local association or association delegate in attendance at the meeting.
- Rule 10** The quorum shall be majority of the voting delegates.
- Rule 11** The rules contained in the current edition of Roberts Rules of Order *newly revised* shall govern the meeting in all cases to which they are applicable and in which they are not inconsistent with the IAIP bylaws, standing rules, regional standing rules, state standing rules, or these state meeting standing rules.
- Rule 12** These rules shall be adopted by a two-thirds (2/3) vote, amended or suspended by a majority of the voting delegates.



General Information

Delegate Seating

There is reserved seating for delegates at all business sessions in the front row of seats. Delegates should be in their seats five (5) minutes prior to any business session. As a delegate, you are required to be at the Delegates Briefing as well as the Business Session. If for some reason you are unable to attend, please ascertain your alternate has certified with the Credentials Chairman prior to the meeting. If you have questions, please see the Credentials Chairman or any NCAIP board member.

Hospitality Suite

The convention Hospitality Suite will be located in the Board Room and will be open during the Friday 10:00 PM – Midnight.

Hostess Identification

The Triangle Insurance Professionals can be identified by the Egyptian Headbands they will be wearing. Please feel free to contact any member of Triangle Insurance Professionals (TIP) if you need assistance.



First Timer's Bill of Rights

As a First-Timer, this Bill of Rights is yours to help you become an integral part of the convention and IAIP. We sincerely want you to feel comfortable getting involved in convention activities and meeting other members. As a First-Timer, you are hereby given the following rights:

First-Timers shall be given special identification, which should be worn at all meetings and functions.

First-Timers shall be recognized by other members as having privileges and be treated accordingly.

First-Timers shall have the right to be **first in line** at:

All elevators

Restrooms during meeting recesses

Social Functions

First-Timers shall introduce themselves and ask members questions about the convention and IAIP.

First Timer's Responsibilities

Privileges come with obligations. With the First Timers' Bill of Rights come the following responsibilities:

Wear your First Timer Identification at all times.

Be on time for all meetings.

Observe the conference rules and parliamentary process.

Attend the First Timers' orientation and Delegates Briefing.

Sit with different people at each meeting and meal functions.

Get involved, ask questions, and participate in workshops.

Report back to your local association on convention activities.

Return to next year's convention with a First Timer.



North Carolina Past State Presidents

Willie Hood White*	Charlotte	1941-1943
Elsie Lee*	Raleigh	1943-1944
Annie Cary*	Greensboro	1944-1946
Helen Home*	Charlotte	1946-1947
Florence Isley*	Raleigh	1947-1948
Lola S. Pugh*	Greensboro	1948-1949
Gwen Jones*	Charlotte	1949-1950
Katherine Pittman*	Raleigh	1950-1951
Myrtle P. Trimble*		1951-1952
Ina M. Stegall*	Charlotte	1952-1953
Nida Swaine Reese	Greensboro	1953-1954
Edna York*	Statesville	1954-1955
Catherine Gardner*	Charlotte	1955-1956
Gloria McClintock	Charlotte	1956-1957
Lola Jean Yoder*	Winston-Salem	1957-1958
Mary Branch	Raleigh	1958-1959
Margaret B. Hudgens	Wilmington	1959-1960
Betty LeFever*	Asheville	1960-1961
Lucille McLean*	Statesville	1961-1962
Elgie Ivey*	Raleigh	1962-1963
Mildred Gryder	Charlotte	1963-1964
Marie Merrile Fittanti	Greensboro	1964-1965
Lois Carmode Peterson	Raleigh	1965-1966
Helen Redmon	Asheville	1966-1967
Rose Compton*	Charlotte	1967-1968
Jane Waugh	Statesville	1968-1969
Betty Thomason	Durham	1969-1970
Mable Carmichael*	Raleigh	1970-1971
Virginia Vestal Smith	Greensboro	1971-1972
Olivia R. Turner*	Wilmington	1972-1973
Virginia Nichols Wester	Wilson	1973-1974
Mary Smith	Wayne County	1974-1975
Myra P. Hendrix	Asheville	1975-1976
Louise R. Chandler*	Durham	1976-1977
Jean Mason	Raleigh	1977-1978
June Mumford*	Wilmington	1978-1979
Phyllis Zorn*	Unifour	1979-1980
Margaret Griffin	Charlotte	1980-1981
Mildred James	Greensboro	1981-1982
Judith A. Warren	Sampson County	1982-1983
Carolyn Rhodes Norton	Mid Mountains	1983-1984
Wanda L. Manning	Raleigh	1984-1985
Sue K. Oakley	Alamance County	1985-1986
Marie A. Bradford	Gaston-Cleveland	1986-1987
Myrtle Lumpkin	Wayne County	1987-1988



Sheila S. Eller	Unifour	1988-1989
Linda M. Vaughn	Fayetteville	1989-1990
Marlene H. Dunn	Charlotte	1990-1991
Diane Sudderth	Durham	1991-1992
Mary Page	Pitt County	1992-1993
Chris Mcleod	Greensboro	1993-1994
Pam Aycock Grimes	Onslow	1994-1995
Donna Watson	High Country	1995-1996
Gail Belvin	Durham	1996-1997
Sharon Davis	Charlotte	1997-1998
Catherine Coleman	Alamance County	1998-1999
Myra Johnson	Coastal Carolina	1999-2000
Donna West	Fayetteville	2000-2001
Glyda Meredith	Greensboro	2001-2002
Fran Humphreys*	Charlotte	2002-2003
Cathy Bowling	Durham	2003-2004
Jeanne Hess	Raleigh	2004-2005
Tiffany Allen	Wilmington	2005-2006
Kimmie Rogers	Unifour	2006-2007
Nancy Gilbert	Greensboro	2007-2008
Brenda Webster	Wilmington	2008-2009
Beth Wilkerson	Durham	2009-2010
Amy Craig	Wilmington	2010-2011
Anita Chick	Greensboro	2011-2012
Angela McClure	Piedmont	2012-2013
Geraldine Plott	Charlotte	2013-2015
Robin Bennington	Durham	2015-2016
Beth Blackwell	Raleigh	2016-2017
Norell Smith	Charlotte	2017-2018
Todd Jones	Greensboro	2018-2019
Paula Burgess	Triangle	2019-2020

*deceased



**North Carolina Association of Insurance Professionals
78th Annual Convention**

Friday, November 1, 2019

Agenda

Event	Time	Location
Registration/Credentials	7:00-3:00	Lobby
Pre-Convention Board	7:30-8:30	Boardroom
Exhibitors Set Up	8:00-10:00	TW Alexander
First Timers	8:30-9:00	Boardroom
CWC Briefing	8:30-9:00	Davis Moore B
CE-Hoarders	9:00-12:00	Davis Moore A
CLP-Insurance 101	9:00-12:00	Davis Moore B
Exhibitors Open	10:00-3:00	TW Alexander
Lunch with Exhibitors	12:00-2:00	TW Alexander
Nominating	2:00-3:00	Boardroom
CWC Competition	3:00-3:30	Davis Moore
Delegates Briefing	3:30-4:00	Davis Moore
First Business Session	4:00-6:00	Davis Moore
Dinner/Welcome Party	6:30-10:00	TW Alexander
Hospitality Suite	10:00-Midnight	Boardroom

Saturday, November 2, 2019

Agenda

Event	Time	Location
Breakfast	6:00-8:00	Great American Grill
Registration/Credentials	8:00-9:00	Lobby
Second Business Session	9:00-11:30	Davis Moore
Awards Luncheon	12:00-2:00	TW Alexander



Collect

*Marie Franzen
Insurance Women of Milwaukee*

Take us, O God under Thy Divine protection.
Make us to act as Thy messengers
for peace and contentment,
for harmony and understanding.

Grant that we may see more clearly
the point of view of other men and women
in all lines of insurance.

Realizing the highly competitive nature of our business,
teach us to respect competition at all times.

Keep us free from pettiness and unwise discrimination.
Let us do our work willingly, honestly and thoroughly,
giving service graciously at all times.

Teach us, O Lord,
to know and realize that by Thy Grace
we can live in perfect peace with one another.

And grant that through this organization
we may become closer in friendship and understanding.

Amen

CIIP/CPIW/CPIM Code of Ethics

In accordance with the established goals and ethical standards of the International Association of Insurance Professionals, I pledge;

To respect the competition within our industry,
To work willingly in an honest and thorough effort
To give service graciously and professionally
in the best interest of those I serve,
and to perform in a manner that will reflect honor and credit on our industry
through superior service to the public.



2019 – 2020 NCAIP Board of Directors

Paula Burgess, Council Director
 Kimmie Rogers, Council Director-Elect
 Robin Bennington, Secretary
 Beth Wilkerson, Fund Custodian
 Todd Jones, Immediate Past Council Director

2019 – 2020 NCAIP Local Presidents

Jacque Clark, Charlotte Association of Insurance Professionals
 Beth Blackwell, Raleigh Association of Insurance Professionals
 Bonnie Lea-Surgeon, Greensboro Insurance Professionals
 Cathy Bowling, Triangle Insurance Professionals
 Angela McClure, Piedmont Association of Insurance Professionals
 Lisa Brock, Randolph Association of Insurance Professionals
 Brenda Webster, Wilmington Insurance Professionals

2019 – 2020 NCAIP Standing Committee Chairs

Todd Jones, Nominating
 Beth Blackwell, Parliamentarian
 Roberta Clodfelter, Education
 Beth Wilkerson, Finance
 Kimmie Rogers, Bylaws
 Kimmie Rogers, Membership
 Laura Scott, Public Relations
 Cathy Bowling, Legislative
 Angela McClure, Safety

2019 NCAIP Convention Chairs

Cathy Bowling, Convention Co-Chair
 Beth Wilkerson, Convention Co-Chair, Treasurer



2019 NCAIP Convention Committee Chairs/Members

Credentials	Bonnie Lea-Surgeon, Chair Katy Willett Joetta MacMiller Kimmie Rogers
Tellers & Pages	Laura Scott, Chair Karis Adams Tina Rogers Geraldine Dent
First Timers	Pam Grimes, Chair
Minutes Approval	Robin Bennington, Chair Beth Wilkerson Debbie McDuffie
Time Keepers	Brian Tilley, Chair Lindsay Keil Carli Witcher Geraldine Dent
CWC	Jacque Clark, Chair
Memorial Service	Cathy Bowling, Chair Robin Bennington
Registration	Debbie McDuffie, Chair Debbie Pass-Soles
Nominating	Todd Jones, Chair Tina Rogers Angie McClure Laura Scott, Alternate Roberta Clodfelter, Alternate



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Confidence While Communicating (CWC)

Welcome

Paula Burgess
NCAIP Council Director

CWC Competition

Jacque Clark
NCAIP CWC Chair

Contestant: _____

Time: _____ Impromptu: _____

Contestant: _____

Time: _____ Impromptu: _____

Contestant: _____

Time: _____ Impromptu: _____

Contestant: _____

Time: _____ Impromptu: _____

Contestant: _____

Time: _____ Impromptu: _____

Announcements

Paula Burgess



**North Carolina Association of Insurance Professionals
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First Business Session

Welcome	Paula Burgess NCAIP Council Director
Pledge of Allegiance	Kimmie Rogers NCAIP Council Director-Elect
National Anthem	Angela McClure
Collect	Kimmie Rogers
Greetings	Cathy Bowling Beth Wilkerson Convention Co Chairs
	Alena Novikava Hotel Welcome
Special Guest	Mike Causey NC Commissioner of Insurance
Keynote Speaker "Beyond Valley of the Kings"	Eric Schoolcraft Duke University
Introduction of Board of Directors/Special Guests and Committee Chairs	Paula Burgess
Region II Report	Jessica Pruitt IAIP Region II Vice President
Credentials Report	Bonnie Lea-Surgeon NCAIP Credentials Chair
2018-2019 Finance Committee Report	Beth Wilkerson NCAIP Finance Chair
First Timers Report	Pam Grimes NCAIP First Timers Chair
Nominating Committee Report	Todd Jones NCAIP Nominating Chair



Council Director-Elect: _____

Nominations: _____

Secretary: _____

Nominations: _____

Fund Custodian: _____

Nominations: _____

Chair, 2020 Nominating Committee: _____

Nominations: _____

Correspondence/Announcements

Robin Bennington
NCAIP Secretary

Adjourned



**North Carolina Association of Insurance Professionals
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Second Business Session

Welcome

Paula Burgess
NCAIP Council Director

Keynote Speaker
"Mastering Difficult Conversations"

Dhiresha Marshall, BS
Brain Based Coaching Certified

Credentials Report

Bonnie Lea-Surgeon
NCAIP Credentials Chair

Nominating Committee Report

Todd Jones
NCAIP Nominating Chair

Council Director-Elect: _____

Nominations: _____

Secretary: _____

Nominations: _____

Fund Custodian: _____

Nominations: _____

Chair, 2020 Nominating Committee: _____

Nominations: _____

Elections

Paula Burgess

2020 NCAIP Nominating Committee (2 Members)

Member Name

Association

1. _____

2. _____



2020 Nominating Committee (2 Alternates)

<u>Member Name</u>	<u>Association</u>
1. _____	_____
2. _____	_____

Break 10 Minutes

By Laws Committee Report Kimmie Rogers
NCAIP Bylaws Chair

2020 NCAIP Convention Committee Paula Burgess

Installation of Officers Pam Grimes

Council Director: Kimmie Rogers

Council Director-Elect: _____

Secretary: _____

Funds Custodian: _____

Past Council Director: Paula Burgess

Acceptance 2020 NCAIP Council Director

Announcements Robin Bennington
NCAIP Secretary

Adjourned



**North Carolina Association of Insurance Professionals
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CIIP/CPIW/CPIM Awards Luncheon

Welcome Paula Burgess
NCAIP Council Director

Collect/Invocation Kimmie Rogers
NCAIP Council Director-Elect

Lunch

Special Guests Dianna Mangum
Amaya Scoggins
Autism Sticker Program

CPIW/CPIW/DAE/CIIP Roberta Clodfelter
NCAIP Education Chair

Memorial Service Cathy Bowling
Robin Bennington

NCAIP Awards Presentation

Category A: 10 Members or Less _____

Category B: 11 – 25 Members _____

Category C: Over 25 Members _____

NCAIP Insurance Professional of the Year

Winner: _____

NCAIP Client Services Professional

Winner: _____

NCAIP Rookie of the Year

Winner: _____

NCAIP Individual Excellence Award

Winner: _____



Confidence While Communicating (CWC)

Jacque Clark

Winner: _____

Recognition

Paula Burgess

Announcements

Robin Bennington
NCAIP Secretary

Door Prizes

Triangle Insurance Professionals

Adjourned



Continuing Education Speakers

Chris Lupton “Hoarding – An Insurance Agent’s Nightmare”

Chris Lupton is a Regional Director with PuroClean. He has lived in North Carolina most of his life. He had the opportunity to travel extensively with his work in restoration and has visited and worked in 40 of our great United States. He has also had the chance to live for short periods in Maryland, Pennsylvania, Florida, and Hawaii. Since 1997, he has worked in the cleaning and restoration industry. He began his career as a technician cleaning carpets and upholstery. He then moved into sales of restoration supplies, which gave him a greater view of the industry. Using his knowledge and training, he spent some time in the production side of restoration. He was given the opportunity to join PuroClean in the training department, and as a trainer and regional sales director. Although he found this to be very fulfilling, he left PuroClean to work as a production manager for a restoration company and as a mitigation and repair estimator. He then came back to PuroClean as a quality assurance and project coordinator in 2016. In 2017, he was given the opportunity to continue to serve franchisees as a regional director at PuroClean and has been in this position since. During his tenure in the restoration industry, he has obtained over 18 industry certifications including Master Fire, Master Water and Master Textile cleaning. Why did Chris choose to work for PuroClean? Having worked for PuroClean before, he knew of the potential of the people he had working in the system and he knew of the potential of the franchise system. He made his decision to come back and he is very happy for having made it. He really enjoys working in the restoration industry.

Kelly Whitener “CLP Module – Insurance 101”



Keynote Speakers

Dhiresha Marshall

Dhiresha Marshall has been a Business Success Coach for over 10 years. She holds a Business Degree from UNC-Chapel Hill and a Business Coaching Certificate from Duke University. At the Neuroleadership Institute, she trained as a Brain-Based Coach and studied with neuroscientists to understand the foundation of creating positive change. She has helped hundreds of people grow their businesses and free their lives to spend more time with their families and friends. Dhiresha excels at helping business owners Master Difficult Conversations, so they gain confidence in handling those tricky situations that come up every day with employees, customers and even at home. In her Masterclass - Let Neuroscience Help You Stay In Control: Master Difficult Conversations at Work, you will walk away with a tool you can use today and every day to quickly resolve those issues that used to keep you up at night.

Eric Schoolcraft

Eric Schoolcraft is an informatics nurse working in Duke University Health System's Performance Services – Clinical Quality department. Eric works with hospital stakeholders on a variety of clinical quality improvement initiatives including, but not limited to, patient falls, mortality, provider documentation, and readmissions. Depending on the task, he employs various tools such as learning from defects, rapid improvement events, workflow modeling and gap analysis, developing pilot projects, new workflows and standard work. Eric is also a report writer and data visualizer using Oracle SQL and Tableau to deliver and transform data into knowledge for direct and focused decision making. Eric earned a BA with focus in Biology from the College of Charleston in 1997. He received his BSN in nursing in 2000 from the Medical University of South Carolina College of Nursing and later obtained a Master's degree in Nursing Informatics from Walden University in 2013.

Entertainment

Doug Daffron

Doug started dancing in 6th grade when his teacher taught him and a few others to dance the Cha-Cha for the PTA. After High School he got a B.S. in Physical Education and a Dance Endorsement from the University of Missouri-Columbia. After graduation he saw an ad to become a dance instructor for Fred Astaire Dance Studios. He started as a trainee and progressed to a top instructor both in the Midwest and the Southeast regions. He went on to become a Multi-Unit owner of 4 studios and an Area Developer of 22 studios. Along the way, he complimented this profession with another as a Mobile Disc Jockey bringing the love of music and dance to many venues. After 30 years in the Dance Profession, Doug became educated as a Certified Financial Planner and now is the business consultant and financial planner for many dance studios. However, teaching dance and seeing people's enjoyment in learning to dance is his main passion.



Special Guest



Mike Causey
NC Commissioner of Insurance and State Fire Marshal

North Carolina Insurance Commissioner and State Fire Marshal Mike Causey is dedicated to ensuring consumers have lower insurance rates and new and better insurance products by fighting for the stabilization and more competition in the state's insurance industry.

Causey is a businessman with more than 25 years in the insurance industry – as an agent, manager, supervisor, and agency owner.

Commissioner Causey is a native of Guilford County where he still lives with his wife of 43 years. He began his insurance career with Metropolitan Life Insurance Company in Charlotte and furthered his expertise in the industry as he continued working as superintendent of agencies for Standard Life Insurance Company before owning his own agency.

Causey graduated from High Point University with a B.S. in Business Administration where he continued his graduate studies. He received his Executive Management Certificate from Purdue University and the distinguished Chartered Life Underwriter (CLU) Designation, the premier designation for insurance professionals, from the American College.

In addition to his experience in the insurance industry, Commissioner Causey has been a lifelong farmer and entrepreneur, owning several family businesses, including an antique store, a farm equipment dealership and a produce market.



Convention Reports

Membership

I would like to encourage each association, along with every member of NCAIP to promote and retain membership. As with any organization, growth is extremely important. What is your WHY? Are you sharing your reason for belonging? Do you have Instagram, Facebook or Twitter? Please share your experiences at our meetings and events so that others may learn about us. Let your employer know how valuable being a member of NCAIP is to you. Host a membership drive within your association. Celebrate IAIP all year long. We are an important part of the insurance professional's journey. Belonging is good business.

As of September 6, 2019, our member records on the IAIP website indicate:

Charlotte Association of Insurance Professionals	26
Greensboro Insurance Professionals	14
NC Members at Large (MAL)	9
Piedmont Association of Insurance Professionals	6
Raleigh Association of Insurance Professionals	4
Randolph Insurance Professionals	5
Triangle Insurance Professionals	9
Wilmington Insurance Professionals	<u>5</u>
Total members of NCAIP	78

Please remember it is important to give back to our association by serving. You will receive just as much as you give, and you will make NCAIP stronger and better for all our members. Ask others to serve, because we all need to have someone believe in us.

Kimmie Rogers, CISR, CIC, CPIW
Membership Chair

Public Relations

NCAIP Public Relations Project 2019-2020 - Autism

Autism is a disability that affects how a person communicates and socially interacts. As of 2016, Autism now affects about one child out of 68 and these figures keep climbing. It is estimated that one out of 42 boys will end up being diagnosed with autism and boys are 5 times more likely to have the disorder than girls. It is one of the fastest growing developmental disorders in the United States today and it is estimated that a family who has one of their family members diagnosed with autism will spend about \$60,000 a year on treatment and care. World Autism Awareness Day is an internationally recognized day on April 2 every year, encouraging people to take measures to raise awareness about people with Autism Spectrum Disorder throughout the world. World Autism Day April 2, 2020 can be observed in a number of different ways. All over the world, major events are organized on this day to raise the profile of autism in the public's eye. These include panel discussions with health organizations, autism-specific organizations, autism experts, and politicians. There are also many different education events that can help parents of autistic children get the help and resources they need.

I would like each association to participate in the World Autism Awareness Day on April 2, 2020. Each association can raise funds or pass out Autism Safety Stickers that can be purchased from Amaya Scoggins. Amaya developed and sells "Autism Safety Stickers" as program working toward her Girl Scout Gold Award. Amaya will speak at the Saturday Luncheon and present her stickers to sale.

Laura Scott
Public Relations Chair



Education

Charlotte is providing three \$1,000 Scholarships to each of the following colleges for their Risk Management programs: UNC-Charlotte, Appalachian State and East Carolina Universities. CAIP plans to hold a CLP class in November. They offer IAIP website overview for their members to access information on the site more efficiently. An application was submitted to NCDOI for a continuing education class before the end of 2019. In April, 2020 a CPR certification class is being planned. CAIP is planning for a Confidence While Communicating Class and speakers on "Excess Insurance" and "Annuity Planning".

Greensboro is planning at least 2 CLP classes (1 in February and 1 in April).

Piedmont is planning to do CISR update classes for Commercial and Personal Lines in February 2020 and 2 days in March 2020 with Jim Sholar, Southern Insurance Training at the Thomasville location. These same classes were provided to our members and agents in the Piedmont area in early 2019 and were well attended. The members are getting their continuing education updated through these classes as well as online courses and CIC courses.

Triangle Insurance Professionals is hosting a CE class called "Hoarding-An Insurance Nightmare" sponsored by PuroClean and a CLP Class entitled "Leadership 101" at Convention. They are also planning educational meetings in early 2020 for an IAIP "I Can" series class, CLP module or Flood.

Wilmington has planned an Educational speaker for their October meeting.

All members are attending online classes, live classes and IAIP webinars for Continuing Education Credits as required to maintain their licenses.

Roberta Clodfelter
NCAIP Education Chair

Safety

NCAIP Safety Project Challenge 2019

Did you know that the leading cause of death in the United States is Heart Attacks? At younger ages, men face a greater risk of heart disease however; heart disease is responsible for one in every three deaths for both sexes and remains the leading cause of death in women as well as men. Did you know that more than 1,000 children drown each year and more than 5,000 are seen in emergency rooms for injuries from near-drowning incidents? Drowning is the leading cause of injury-related death among children between the ages of 1 and 4 in the United States and the 3rd leading cause of injury-related death among children under 18 in North Carolina.

When someone's blood flow or breathing stops, seconds count. Permanent brain damage or death can happen quickly. Cardiopulmonary resuscitation (CPR) is an emergency procedure for a person whose heart has stopped or is no longer breathing. CPR can maintain circulation and breathing until emergency medical help arrives. If you know how to perform cardiopulmonary resuscitation (CPR) you could save a life. While our association has a diverse age range of members, each of us could benefit from knowing how to perform CPR.

For the 2019-2020 association year, I would like to challenge all of our NCAIP associations to host a class in your communities and/or provide to your membership CPR / First Aid Training. You never know whose life you may be saving.

Angela McClure, RHU, CIIP
Safety Chair



Local President's Reports

Greensboro Insurance Professionals 2019-2020

Our slogan for 2019-2020 is Connect, Engage & Motivate. Over the past several years we have seen changes, some good and some bad. We have lost seasoned members and we are gaining new members, eager to learn what NCAIP/IAIP is all about. We want to be more of an involved organization, with everyone able to throw out ideas that will enhance us and to better us. We look forward to the new members being energetic and bringing us wonderful ideas. We conduct most of our business with the Board. We have gained two members thus far. We are looking forward to a great year of fellowshiping and community involvement where we can create energy and grow. We are taking the time to educate and refresh our members about the opportunities within IAIP. We are encouraging the use of the IAIP website as a tool to help gather momentum and ideas to succeed in our goals to Connect, Engage and Motivate.

Here is a summary of our year:

September we had our first meeting at a local brewery, the participation was great. We made a monetary contribution to Hydrocephalus.

October will be our annual picnic/bonfire on the property of Todd Jones. We partnered with United Way of Greensboro with a candy drive.

November, we look forward to hearing from our NCAIP Council Director Paula Burgess.

December, we will have our annual Christmas gathering at the home of one of our members where we will do a craft project.

January, we will host our monthly meeting (Speaker to be determined)

February, we will have a CLP Class, taught by Tina Rogers

March, we will host our monthly meeting which will be our membership drive. (Speaker to be determined). We will also host a golf tournament.

April, we will have a CLP Class, taught by Tina Rogers

May, we will have our annual Banquet where we will install our Officers for the 2020-2021 year. (Speaker to be determined)

June through August are our summer months. We do not have anything during these months; it allows our members to have fun with their families.



**Piedmont Association of Insurance Professionals
2019 - 2020**

PAIP started our year off having fun. Membership voted to change things up a little and try to handle as much of our business via email as possible and then we would have more time for speakers or to do fun activities during our normal meeting nights.

One of our first fun activities was all of our members met for dinner at a local restaurant and then we went to Babycakes Gourmet to take a cake decorating class. All of our membership enjoyed the time of fellowship and of course we loved the cake decorating.

PAIP continued our tradition of distribution of Operation Edith coloring books to area fire departments. We have several volunteer fire departments that do not always get materials for distribution to area elementary schools. We try to help these fire departments. This year we gave Operation Edith coloring books to 12 different fire departments in surrounding counties.

PAIP has several other things planned for the remainder of our association year. We are starting a quilting class led by our very own Judie Hancock. Not only are we learning something new, we are enjoying each other's company and making connections.

PAIP will be hosting our education classes again this year. These classes have continually grown over the years and area insurance professionals not only look forward to our instructors but also the time to fellowship with other insurance professionals.

Some of our other activities include speakers/demonstrations on topics such as CPR and flower arranging. Our annual white elephant sale (which is always a lot of fun and fellowship) and visit from our Council Director is scheduled for February. Membership will host our annual recognition night when we honor one of our area police officers or fire persons for their selfless service to the community. PAIP also will be hosting our annual Prom Promise at one of our area High Schools again this year to not only discourage drinking and driving but also texting and driving. This event appears to have made an impact on the youth at this High School and the staff has advised us of how much the students look forward to us hosting the event every year.

PAIP membership is looking forward to all the educational and entertaining activities we have scheduled for the remainder of our association year.

Angela C. McClure, RHU, CIIP
PAIP President



**Triangle Insurance Professionals
2019-2020 “Dream It. Believe It. Build It”**

July 2019 the Durham Association of Insurance Professionals became Triangle Insurance Professionals by unanimous vote of our 9 members! Our hope in this update and refresh is to encourage Durham, Orange, Wake and surrounding counties insurance professionals to become members of TIP/NCAIP/IAIP. We honor and appreciate those who founded DAIP some seventy years ago. Our area has evolved and melded into a well-known and respected part of North Carolina and we felt we needed to update our branding to be more inclusive of the total area! Change is good and challenging and keeps us all on our toes! “Dream it. Believe it. Build it.”

Being the Host Association for the NCAIP 78th Annual convention, will consume our July, August, September meetings as we plan, check, double check to be sure all in order! Special meeting times will come in October as the countdown to Nov 1 -2, 2019 begins!

We did view a Safety video during our August meeting, “How to Save Yourself from Drowning”.

At our September meeting we viewed as a group IAIP’s 8/28/19 Town Hall meeting.

October we will continue our tradition of presenting Annual Firefighter of Year Awards to Durham City and Durham County firefighters. We are partnering with Durham Masonic Lodge #352 for this event. Several members will also hand out IIANC’s “Operation Edith” materials to fire departments and schools.

November – June 2020 topics/speakers are still in the planning stage....we will all be breathing easier and able to focus better after November 2nd !

TIP fund raising continues with Scentsy, RADA Cutlery, Butter Braids and Cookie Dough and of course Mascot Pecans!

TIP members continue to be engaged with NCAIP/IAIP with hopes to engage more insurance professionals with the opportunities offered by our Association. ‘Going All In’ so enhances professional and personal aspects of our wonderful industry.

Cathy Bowling, AAI, AIS, CPIW
President 2019-2020



**Charlotte Association of Insurance Professionals
2019-2020**

Community Service/Public Relations: Potential projects mentioned are Pat's Place, Mecklenburg County Animal Shelter, Domestic Violence Shelter, Ronald McDonald House, Men's Shelter, Veteran assistance.

Education/Safety: Geraldine Plott will conduct a CLP class for an upcoming meeting. We also collected school supplies for Charlotte-Mecklenburg County schools.

Membership: September Membership drive will be at Dave & Busters.

Programs: Tentative list of 2019-2020 programs

- September – Membership Drive @ Dave & Buster's in Pineville, NC
 - October – Meet & Greet @ Waldhorn Restaurant for Oktoberfest
 - November – CLP Class
 - December – Volunteer at Charlotte Housing Authority
 - January – Council Director Visit and community service project (Operation Sandwich or Blessing Bags)
 - February – Wine Tasting
 - March – Safety Project (Axe Throwing)
 - April – CPR Certificates with the Red Cross
 - May – Membership Recognition with Retirees
 - June – Installation of Officers
- Annual Golf Tournament is May 15, 2020



**North Carolina Association of Insurance Professionals Endowed Scholarships
Report**

Appalachian State University, Walker College of Business

Academic Year 2019-2020

These scholarships are critical toward providing opportunities for students to succeed at Appalachian State University in the Walker College of Business. Paula Burgess, NCAIP Council Director, had the opportunity to meet the recipients on September 20, 2019 at the annual Walker College of Business scholarship reception in the Holmes Convocation Center.

Everyone was very appreciative of NCAIP's support.

Recipients of the NCAIP scholarships for the 2019-2020 academic year are:

Logan Meredith Macior

Jeb Langdon Phillips



Convention Sponsors



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**Johnson & Johnson, Inc.
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Independent Insurance Agents of North Carolina (IIANC)



North Carolina Association of Insurance Professionals

Exhibitors

CRC Group – Cliff Young, Caroline Buchannan
 TAPCO Underwriters, Inc. – Bonnie Lea-Surgeon
 Puro Clean – Chris Lupton
 Carolina Restoration Services – Bridgette Arnold

Tables

Opulenza Designs – Debbie McDuffie
 Accessories by Donna – Donna Mikels
 Thirty One Gifts – Melinda Braddy
 Scentsy – Michele Laurer
 NAIW Legacy Foundation – Geraldine Plott

Contributors

Sharyn Clark, Member, CAIP
 The Charlotte Association of Insurance Professionals
 Curi – Debbie Pass-Soles
 Johnson & Johnson – Proud sponsor of the annual CWC Competition

Conference Attendees

Members At Large

Kimmie Rogers

Charlotte Association of Insurance Professionals (CAIP)

Bobby Shields
 Norell Smith
 Geraldine Plott
 Trisha Herold
 Jacque Clark

Greensboro Insurance Professionals

Karis Adams
 Laura Scott
 Geraldine Dent
 Lindsay Keil
 Bonnie Lea-Surgeon
 Carli Witcher
 Tina Rogers
 Brian Tilley
 Todd Jones



Conference Attendees

Piedmont Association of Insurance Professionals

Betty Callicutt
Roberta Clodfelter
Angela McClure

Raleigh Association of Insurance Professionals

Beth Blackwell (dual membership)
Pam Grimes
Debbie Pass Soles

Triangle Insurance Professionals

Beth Blackwell
Cathy Bowling
Robin Bennington
Paula Burgess
Beth Wilkerson
Joetta MacMiller
Debbie McDuffie
Katy Willett

Guests

Polly Johnson
Jessica Pruitt, Region II Vice President
Keith Pruitt
Bobby Soles

