

NEW HORIZONS

INSURANCE PROFESSIONALS OF MID-MISSOURI SEPTEMBER 2007

WWW.IPMMONLINE.COM



NEXT MEETING
SEPTEMBER 17, 2007
6:00 PM

Columbia Insurance Group

Rick Henderson, Managing Partner for APEX Financial, LLC, will speak on aspects relating to Long Term Care Plans.

He will provide the details needed to make an informed decision. Changes in Federal programs may affect you and your family's assets. Please take time to consider attending this very important and informative program.

Contact Mary Jo Oswald to RSVP, at 214-4748, or at moswald@shelterinsurance.com.

AUGUST MEETING MINUTES:

Insurance Professionals of Mid – Missouri
August 20, 2007
Meeting Minutes

President Mary Gruender called meeting to order at 6:04 pm.

Kayde Holton read the Collect.

Rose Tipton, Past President inducted Mary Gruender as President.

Guests, Teresa Conant of Auto Owners and MaToya Henderson of Shelter Insurance were introduced and welcomed.

Mary called for approval of the minutes. No corrections were made, and the minutes were approved as printed. Mary called for approval of the treasurer's report. They were approved as presented.

Arlene Schwartz presented the NAIW course on "Team Building". She presented the stages that were vital to successful team building, and specifics relating to each.

Committee Reports:

- Rose reported that pictures from the July meeting at El Jimador's were available for the member's to view.

- She announced the Holiday Dinner was scheduled for December 3, 6pm at JAZZ, where there will be a Trash and Treasure Auction.
- Mary Jo Oswald announced the new members of IPMM, and asked each to introduce themselves. Each will need mentors.
- She also mentioned the upcoming Membership Drive. Asks for RSVPs so there will be enough hand-outs for all in attendance. The program, Long-Term Care Plans, is supported by National. Each member is encouraged to bring guests so this important message can be heard.
- Arlene provided list of possible upcoming program topics.
- Terri Stambaugh reported on the upcoming Fall Weekend in St. Charles, September 7th – 9th. Everyone is encouraged to attend to have fun, relax, and get to know members of our Region better. CE credit offered has been cancelled due to lack of interest.

Old Business:

- Lori Meyer noted the \$25 that was voted and approved at the impromptu business meeting, was never sent. It is no longer needed for the initial gift. It was agreed that we send the \$25 to the Reach Out and Read National Center.

New Business:

- Budget report was handed out and explained by Mary Jo. Changes were unanimously approved at the board meeting, and presented to the membership for approval. The following changes were unanimously approved by the membership:
 - 1) Change Education committee name to Member Education.
 - 2) Develop a Continuing Education committee.
 - 3) Eliminate the Safety and Legislative committees.
 - 4) Change Newsletter/Web committee name to Communications committee.

There is ample money in the account to eliminate fund-raising for the 2007-2008 year. Focus will turn to develop plan to offer continuing education courses, that will in time provide needed funds.

50/50 drawing for \$13.50 was won by Arlene.

Meeting closed at 6:55 pm for refreshments.

Respectfully Submitted,

Diane Kidwell
Secretary

AUDIT COMMITTEE REPORT:

The IPMM financial records for 2006-2007 were audited on 7/9/2007 with the following results:

Balance on June 30, 2006	\$ 8,245.17
Total Deposits	\$ 7,704.82
Total Disbursements	\$ 7,070.54
Balance as of July 9, 2007	\$ 8,929.45

Documentation to support issuing the following check was incomplete:

#247 5/10/07 Center Court

Email indicates the receipt would be submitted once the plaques were paid for, but there is no receipt.

It was noted that checks written were not shown on the monthly Treasurer's report when they were written. Instead they were included when they cleared the bank account. For example, check #264 was written on 4/18/2006 and cleared the account on 7/14/2006. It was not shown on the Treasurer's Report until July. This is not recommended procedure. Checks should be reported as disbursements on the Treasurer's Report during the month they are written. They are accounts payable and must be deducted from our account balance immediately in order to avoid overstating our assets. The Treasurer's report should mirror the checkbook.

Respectfully submitted by the Audit Committee
Arlene Schwartz, Chair

NEWS FROM MO COUNCIL NETWORKING MEETING:

Members of the Missouri Council of NAIW met at the Boss Café in Clinton, Missouri on August 25, 2007. Missouri Council Director Peggy Bittiker was the presiding officer.

The meeting began with announcements from NAIW International President E. Faye Evans. President Evans plans to include member recognition, achievements, testimonials and articles on the NAIW web site (www.naiw.org). Also members who recruit new members or returning members will be recognized on the President's page, by Region. Council Director Bittiker distributed copies of the flyer for President Evans' Presidential Challenge program "Puzzle Master". This flyer can be downloaded from the NAIW web site.

Director Bittiker asked for volunteers for a task force that will be working on the Missouri Council Horizon Plan. She also requested copies of Horizon Plans from each association. She then verified the dates of her visit to each local association and reviewed her goals for the upcoming year. She will be issuing a Missouri Council newsletter on a quarterly basis beginning in September. The newsletter should contain more details on many of the items and reports discussed at this networking meeting. Director Bittiker asks that each association provide her with member news to include in the newsletter.

Next were reports from each local association, from Missouri Council Membership Chair Alexis Nixon and from Missouri Council Public Relations Chair Diane Kidwell.

Joni Burgoyne, chair of the Missouri Council Meeting Planning Committee and Mary Sherrell, co-chair, announced that this year's meeting will be again be held at the Adams Point Conference Center in Blue Springs. Meeting dates are November 9 and 10. Registration forms and information about the Friday afternoon CE course should be available very soon. A committee signup sheet was passed around. Volunteers are still needed for Credentials, Audit, Minutes Approval and Pages/Tellers. Contact Director Bittiker or IPMM President Elect Arlene Schwartz if you would like to volunteer.

There was a short discussion of plans for Fall Weekend in St. Charles. Last count indicated there will be 28 people attending.

The last item on the agenda was to set the date and place for our spring networking meeting. It was tentatively agreed that we would meet again on April 19, 2008 at the same place, the Boss Café in Clinton, at 10:30 a.m.

Submitted by Arlene Schwartz

(There are pictures of the networking meeting at the end of this newsletter.)

REMINDERS:

Please bring non-perishable food items for the **Food Bank** to our monthly meetings. Contributions to this organization are an ongoing project for IPMM.

Do you have **books** you have read and are ready to pass on to someone else? Or **videos** that are collecting dust since you switched to DVDs? Why not donate them for an **IPMM fundraiser**? Donated items are displayed at each meeting for sale to members (at very low prices) and the money raised goes into our treasury.

UPCOMING EVENTS – PUT THESE DATES ON YOUR CALENDAR:

September 7-8 -- Fall Weekend in St. Charles

September 14 -- Wear your NAIW Apparel

September 17 -- Monthly Meeting, Long Term Care

Are you caring for aged parents? Have you considered who is going to take care of you or the costs that will actually be involved? Our September meeting will allow you to make an informed decision, while you still have a choice.

Please remember to RSVP to Mary Jo Oswald.

October 12 -- Wear your NAIW Apparel

October 15 -- Monthly Meeting, Council Director Peggy Bittiker

November 9-10 -- Missouri Council Meeting in Kansas City

November 16 -- Wear your NAIW Apparel

November 19 -- Monthly Meeting, Member Orientation

December 3, 2007 – Christmas Party

Please mark your calendars for December 3, 2007! If you could send me a note to let me know if you are coming that would be great. When I set this up I may have been a little shy on the head count I was expecting and I will need to let the folks at Jazz know. I am so excited to be your Holiday Committee Chair, the rest of the committee is such a great group wt work with, and we have so many new members this year that I know this December's party will be a blast.

Holiday Committee; Rose Tipton – Holiday Committee Chair

WHO: IPMM Members & guests

WHAT: Trash & Treasure
Christmas Dinner

WHEN: Monday, December 3, 2007

WHERE: JAZZ
Mezzanine level
1605 Chapel Hill Rd
Columbia, MO

WHY: Just for fun!

2007-2008 OFFICERS:

President – Mary Gruender
President Elect – Arlene Schwartz
Secretary – Diane Kidwell
Treasurer – Leslie Turner

NEWSLETTER DEADLINE:

The deadline for submitting information or articles to be included in “New Horizons” is the last working day of the month. Information for the next newsletter is due BEFORE SEPTEMBER 28, 2007. Please send items to Christy Ford at cford@shelterinsurance.com.

NAIW MISSION STATEMENT:

NAIW (International) serves its members by providing professional education, an environment in which to build business alliances and the opportunity to make

connections with people of differing career paths and levels of experience within the insurance industry.