

## New IIAN Officers & Directors Elected in Lincoln

### Phil Winkelmann Of Omaha Is President

IIAN members elected new officers and directors at the association's annual business meeting on Thursday, October 2 in Lincoln, at the Big "I" Annual Leadership luncheon during IIAN's 107<sup>th</sup> annual convention. IIAN's new president is **Phil F. Winkelmann**, with Omaha Insurance Services in Omaha. Also elected were **Michael E. Jones, CIC**, Jones Insurance Agency, David City - Vice President; and Krae E. Dutoit, Gary Thompson Agency, Grand Island - Secretary-Treasurer. **Mark B. Lisko**, with Insurance Planning Associates in Omaha, was elected National Director from Nebraska on the IIABA national Board. Two IIAN directors were also elected: **Elliot Bassett, AIP** – Ellerbrock-Norris Insurance, Omaha; and **Erica Tucker, CISR** – Midwest Insurance Exchange, Eagle. **IIABA Executive Committee Liaison Vaughn Graham, CPCU, AFSB, CIC**, of Tulsa, Oklahoma, installed the new officers to wrap up the luncheon. Graham has Nebraska roots – his father was a Nebraska native, growing up in Omaha; his grandfather was a reporter for the *Omaha World-Herald*, and was killed in action serving as a war correspondent in World War II. Winkelmann presented outgoing IIAN president **Dee M. Sykora, AAI, AU, CPIW**, with a plaque in appreciation of her service to IIAN during the past year, and shared his goal as president for the coming year – to get more members involved in their association.

## 107<sup>th</sup> IIAN Annual Convention Features U.S. Senate Candidates, CSR Day, Managing Sales & Compensation, CE Hot Issues

### 425 Attend In Lincoln – Over 55 Exhibitors At Trade Fair

Over 425 IIAN members and company representatives attended "**Under The Big 'I' Top**", IIAN's 107<sup>th</sup> annual convention held at the Embassy Suites in Lincoln, October 1-3. "I was happy to see so many IIAN members from the Lincoln area at the convention – especially all of the young agents and 44 first-timers," commented **Phil Winkelmann** of Omaha, who was elected and installed as IIAN's new president during the convention. "Thanks to Annual Convention committee chairperson **Erica Tucker, CISR** from Lincoln, and her committee, who did a great job of putting together an excellent program." The highlight of the convention was the Annual Leadership Luncheon on October 2, featuring presentations by U. S. Senate candidate nominees Dave Domina, D., and Ben Sasse, R. Conventioneers also enjoyed "The Main Event" 4th Annual IIAN Foundation Fundraiser dinner, carnival games, and live auction on October 2, where members munched on carnival treats, including cotton candy, and tested their skills on twelve midway games circling the room. The evening event raised \$7,000 to support the Foundation's programs to attract new talent to the independent agency system.

[Click here for a list of exhibitors and sponsors, along with contact information.](#)

[Click here for photos.](#)

**On Wednesday, October 1**, over 100 golfers, along with 28 hole sponsors, made the most of a soggy, wormy front nine for the convention Golf Tournament at Firethorn Golf Club, chaired by **Jeff Allen** with Columbia Insurance. Foursomes had to double up, due to extremely heavy rains on September 30. Golfers made good use of the glove/sock combo they received compliments of IIAN!

In the meantime, back at the Embassy Suites, 40 agents and CSR's earned 8 CEUs and learned about the risk management process and how to work with professional risk managers, in a new CISR Elite course presented by instructor **Chuck Hembree, CIC, CRM**. At the same time, over 25 Applied system users learned about TAM cleanup, managing and organizing attachments, and how to audit for compliance, from Applied instructor **Sue Good**.

**On Wednesday evening**, a crowd of almost 300 conventioners and guests visited with 56 exhibitors during the opening **Industry Night** reception. After making the rounds, many stopped at the Trusted Choice® photo booth for agency team pictures, and had custom balloon sculptures made by "Shades The Clown". **Producers XL** was voted the best by conventioners, winning the traveling "Exhibitors' Spirit" award for 2014. Five lucky members who visited every booth won \$100 cash each in the final trade fair drawing – Vincent Christensen, Kim Lessert, Janelle Medinger, Shannon Mohrman, and Mike Shanahan.

**On Thursday, October 2**, agents earned up to 6 CEUs and got a very lively and informative update on important commercial and personal lines coverage issues from instructor extraordinaire **David Sanborn, CPCU**. The convention's **Management track - "Creating That Sales Culture"** and **"A New Compensation Model"** - featured agency management guru **Virginia Bates**, who held the rapt attention of attendees all day.

**On Friday, October 3**, veteran instructor **David Thompson, CPCU, AAI**, received kudos for his presentation of "E&O: Meeting The Challenge of Change" to over 125 attendees. **IIABA Executive Committee Liaison Vaughn Graham, CPCU, AFSB, CIC**, of Tulsa, Oklahoma, shared IIABA's plans for giving members "a sustainable competitive advantage" with programs such as trustedchoice.com's personal and commercial lines leads, while continuing to be one of the top lobbying forces on Capitol Hill to protect the business interests of independent agents. Vaughn's spouse, Candy, drew the winner of the raffle to raise funds for Big "I" PAC's – **Jim Steider** of Seward was the lucky winner of a Microsoft Surface Pro3 with keyboard. The raffle raised over \$3,000 for Big "I" advocacy efforts in Lincoln and Washington, D.C. **Mindy Dealy** of Ogallala was the winner of the Grassroots Survey drawing – a \$50 gift card.

## Annual, Special IIAN Awards Presented October 2

Outgoing IIAN president **Dee M. Sykora, AAI, AU, CPIW**, presented IIAN's annual agent and company awards at the Big "I" Annual Leadership luncheon on October 2 in Lincoln.

Member agents honored were: **Distinguished Service Award – John V. Deardorff**, Omaha, for almost 25 years of leadership at the local, state, and national levels, all the while promoting the value of the independent agent to consumers and our representatives in Congress; **Committee Chairman of the Year – Michael Glaser, CPCU, ARM**, Omaha – for his leadership as chairman of IIAN's Board Development committee, streamlining and modernizing IIAN's governance structure and conducting a comprehensive member services review ; and **Young Agent of the Year – Nicole Ostrander**, Lincoln, for her leadership as a young entrepreneur who started an independent agency from scratch right out of college, and involvement in her local young professional organization.

Member company representatives honored were: **Company Representative of the Year – Riley Tonkin, CPCU, CIC**, EMC Insurance, in recognition of his hard work with his company's agents to place business and foster relationships with management and underwriters; and **Five Star Company of the Year – Iowa Mutual Insurance Company**, accepted by **Georgia Puls, President**, who travelled to Lincoln from the home office in DeWitt, Iowa, along with **Dave Kaufman, CEO**, and **Charlie Stapleton, COO** of Motorists Insurance Group, and their Nebraska team. Both company awards were determined by nominations from IIAN members.

Also at Thursday's luncheon, **Gary Thompson Agency**, based in Red Cloud, was named **"Trusted Choice® Agency of the Year"**, in recognition of the agency's use of the national consumer brand in all of its customer communications, accepted by Krae Dutoit.

And that evening, during "The Main Event" dinner and fundraiser, the following agents accepted their agency's long term member awards –

### 10-Year Members

**Kent Insurance & Investments**, Valley –Brian Kent  
**Town & Country Agency**, Clearwater - Amy Rademacher, Greg Wacker, Mark Weidner, Jessica Wieneke

### 25-Year Members

**Affiliated Brokers Insurance**, Kearney - Doug Brummels  
**Jones Insurance Agency**, David City – Mike & Joanie Jones, Grant Jones  
**Nebraska Bankers Insurance**, Lincoln - Bill Smythe  
**New Frontier Insurance Agency**, Carleton - Nancy VanCleeef  
**New Frontier Insurance Agency**, Ft. Calhoun - Ritch Nelson, Michelle Appel  
**The Writer Agency**, Ogallala - Mindy Dealey

And last but not least, **Brenda Kaiser, CIC, AAI**, IIAN's Member Programs Director, was honored with a special 25-year Service Award and gift, presented by IIAN CEO Carol McClelland, CAE.

## Excellence In Education Recognized October 1

### CISR Designees, Scholarship Winners Honored

IIAN's Annual Education Recognition Luncheon was also held on October 15 in Lincoln, as part of "Customer Service Representative Day" during the association's 106<sup>th</sup> annual convention. The annual event recognizes those who have achieved high educational goals. **IIAN Foundation President Dave Chastain, CPCU, CLU** and IIAN Professional Development committee chairperson **Katie Kochenower, CIC, ARM, AIP**, gave an update on the Foundation's expanding programs and 3-year goals, including *InVEST Nebraska* [www.investne.org](http://www.investne.org), a cooperative effort by IIAN, the IIAN Foundation, and Project InVEST, the national Big "I" insurance education program for high school and college students. InVEST Nebraska is working with UNL College of Business Administration to connect with senior business students and educate them about the independent agency system, as well as promoting the growing online Insurance Services associate degree program which started in 2010 through Northeast Community College (NECC).

The highlight of the luncheon was the **conferment of the Certified Insurance Service Representative (CISR) professional designation** on 15 insurance professionals who completed the five-course program of study during the past year. The conferment ceremony was performed by National Alliance Academic Director **Michael Kersgard, CIC, CLU** from Austin, Texas.

### IIAN is proud to congratulate Nebraska's new CISR designees:

**Brenda Bowman, CISR**  
**Victoria Heckerson, CISR**  
**Jaimie Miller, CISR**  
**Robert Patton, CISR**  
**Jeanie Quick, CISR**  
**Linda Simpleman, CISR**  
**Teresa Tigner, CISR**

**Mary Circo, CISR**  
**Jana Hellbusch, CISR**  
**Luray Newwirth, CISR**  
**Christina Perkins, CISR**  
**Hayley Sellhorst, CISR**  
**Dawn Thomson, CISR**  
**Patrick Tvrdy, CISR**

**Mindy Cook, CISR**  
**Jessica Leak, CISR**  
**Karen Osterbrock, CISR**  
**Clayton Peterson, CISR**  
**Lucas Siel, CISR**  
**Korissa Thompson, CISR**  
**Susan Vacinek, CISR**

Chastain honored the Foundation's 2014 high school scholarship winners, and presented the Jacupke Memorial scholarship to this year's winner, **Tess Wahlmeier**, who attended with her father, Patrick. Those honored were:

- **Jacupke Memorial Scholarship – Tess Wahlmeier** was salutatorian of her class at Saint Cecilia High School in Hastings, and is majoring in Journalism and English at UNL;

- **Linder Memorial Scholarship** - **Scott Borchert** from Pawnee City, was valedictorian of his class at Pawnee City High School, and is majoring in Finance and Accounting at the Creighton University;
- **IIA of Omaha Scholarship** – **Joseph Zach**, graduated near the top of his class of 178 at Skutt Catholic High School in Omaha, and is pursuing a degree in Accounting and Finance; and
- **Lincoln/Lancaster County Area Scholarships** – **Lynn Diep** graduated from Lincoln High School with a 4.0 GPA, and is pursuing a degree in International Business.; **Collin Heath** graduated from Weeping Water High School, was an outstanding student and athlete, and is pursuing a Business degree at UNL; **Garrett Kraus** graduated from Lincoln Southeast High School with a 4.0 GPA, and is majoring in Business at UNL; and **Brian Schluckebier**, who graduated from Lincoln Lutheran High School In Lincoln, and is working towards an Advertising/PR degree at UNL.

Chastain also recognized the **Dr. Curtis Elliott Scholarship winner, Jessica Gehr** of Lincoln, who is a junior at Nebraska Wesleyan University, majoring in Business Administration and Political Science, and plans to attend law school, with an emphasis on insurance law.