



California Council of IAIP

CALIFORNIA COUNCIL OF IAIP

2019-2020 CHAPTER REPORTS

Chapter Listing

IAOF	Insurance Associates of Fresno
IPLA	Insurance Professionals of Los Angeles
IPMB	Insurance Professionals of Monterey Bay
IPOC	Insurance Professionals of Orange County
IPS	Insurance Professionals of Sacramento
IPSGV	Insurance Professionals of San Gabriel Valley
MAL	Members at Large
SDAIP	San Diego Association of Insurance Professionals
SFIP	San Francisco Insurance Professionals
SBAIP	South Bay Association of Insurance Professionals



Insurance Associates of Fresno

A Warm Greeting from the Central Valley, Fresno.

It's hard to remember a time prior to the Covid-19, but there was, and IAOF was out trying to do educational events, membership mixers, and community action.

Membership Mixer: Hosted both an Escape Room and a Murder Mystery Party. Both events had 20+ people, with new members joining due to interest in the activities.

Education: Hosted a Wine & Wisdom Class and presented the I CAN class – E&O Hotspots. IAOF provided the full CWC Class of which non-members also attended. Several of us attending IAIP E-learning as well as Town Hall Meetings. Marcella led the 20-21 series in January by teaching her class on 'Climate Change and Insurance Industry Effects'. She also got this course CE certified, and taught this one hour class for the Greater Seattle Insurance Professionals in May. We also hosted a class with Sedgwick on Wildfires that included breakfast. We had almost 20 people at this event.

Community Service: Collection of school supplies for Marjaree Mason Center for Women and Children. At Thanksgiving and Christmas time we hold an annual cereal box drive for Jefferson Elementary. We have a fun general meeting with members to help wrap the cereal boxes and present them to the teachers at the school. This year, two teachers came to our meeting and we were able to give over 100 boxes of cereal. They have a fun breakfast, take the extra cereal home, and then use the empty boxes for fun educational projects.

Fund Raising: Two Not So Auctions/Auctions Fundraising Nights to raise funds for our yearly Scholarships. IAOF is hosting a donation drive for California Wildfires and will match up to \$500 of donations.

Awards: Marcella Beasley made it into the Top 5 for the 2019 Outstanding CSR of the Year competition with the National Alliance, including being named the 2020 Outstanding CSR of the Year for California. IAOF was presented with the Jeffrey Nordhaus Memorial Award for Education. Alison Holmes was presented with the Region VII Recognition Award. Marcella Beasley was presented with the Client Service Professional of the Year, Risk Management Professional of The Year, and Young New Professional of the Year at the Regional conference, as was able to bring home the Risk Management and Young New Professional of the Year at International.

Service: Robin Souza is RVP and Alison Holmes is an assistant. Several of us served in IAIP Task Forces. Marcella was voted in as CA Council Membership Chair. Alison served as the Safety Liaison for CA Council. Promotion of IAIP and others on our Facebook page as well as promoting Safety Tops on Facebook. Four of us attended Regional in Vancouver, where we chaired/served on committees and Marcella participated in CWC.

And finally after Covid we have continued to stay in touch by holding board meetings via zoom, including game nights, membership mixers, and other meetings/get-togethers.

Kindly Submitted,
Kim Combs, IAOF President



Insurance Professionals of Los Angeles, Inc.

IPLA has continued to focus on community action events, we donated blankets to homeless families that live the park and we were also able to make a donation to Good Shepherd Center who provides shelter, food and employment services to homeless women to help them along their way to self-sufficiency and lives of independence.

My President's platform is C.O.U.R.S.E. Community Outreach Using Resources, Skills and Education. Our focus is still on growing this Industry and with the focus on Outreach and Education, we have had two members renew their CLP designation, Mitula Patel & Christine Chandler Tillett.

IPLA hosted the 2019 CA Council Meeting in Glendale California. Our theme was Find Your Hidden Jewel in 2019. We had a Pirate themed Welcome Party and attendees were able to decorate their own Treasure Chests.

Ray Huff was presented the 2019 Gayle Reskin Angel Award and Christine Chandler Tillett complete her two year term as the CA Council Director.

With the continued uncertainty of the Pandemic, we have not had an opportunity to meet in person. Zoom allowed us to meet and invite some of our members that moved away and while they are physically distant from us, we wanted to take this this time to let them know we were still right here with them.

IPLA is excited about the opportunity to attend and support the 2020 Ca Council being hosted by South Bay Association of Insurance Professionals. While our membership numbers may be small, we plan to be in full effect volunteering on various committees.

IPLA will continue to support its community and the Legacy Foundation in 2020-2021.

Respectfully submitted,

Kari Woods, CLP
Immediate Past President



Insurance Professionals of Monterey Bay

Hello fellow members!

The Insurance Professionals of Monterey have had a quiet year this year. We only meet occasionally so the pandemic really took its toll on our getting together. Then in mid-August, the fires broke out close to the edge of town in Salinas and in the canyons of Carmel Valley, (not to mention Big Sur & Santa Cruz). The air quality was unhealthy & honestly, we all had other things on our mind. In fact, our very own Bev Weakley, took in a friend for 5 days that had to be evacuated. Thankfully, that friend could return to her home.

In March, Bev Weakley & myself were able to attend the Region 7 Conference as delegates for our chapter which was held in Vancouver, WA. We were so excited to be attending this conference hosted by the MAL's. Plus, Bev had plans to stay the weekend & visit family and I was going a couple of days early to visit clients with my broker. Well, both of those extracurricular activities fell through. While we were in Vancouver, we both received an email stating that all business travel including attendance at conferences would cease and that effective 3/16/2020, the office would be closed, and staff had to start working from home. Things were changing so quickly. It was like "what's happening?" But the conference was awesome. If we were going to be sequestered at a hotel, this one was a great one to be 'stuck at'. The staff at the hotel were so, so happy we didn't cancel. They were so attentive and helpful. The MAL's did an amazing job with this conference. And I am not talking about all the planning & the fundraising they did for the last 5 years. That was great but I am talking about how they dealt with a looming pandemic and the protocol changes they had to deal with. This is on top of cancellations coming in left & right. They had to really be flexible & think on their feet. And then on top of everything else, there was a snowstorm during the wee hours of Saturday morning, and we woke up to a winter wonderland. But would the road conditions prevent the keynote speaker from getting to the hotel? Well she made it and her presentation was just what we needed. It was lighthearted & funny. I know it is not the conference they envisioned but it will, for me be a "Hallmark" conference. These women showed how to be professional, positive, resilient with a sense of humor. Truly amazing. Bravo.

In July, I attended the virtual Leadership Meeting. Kari Woods, our new Council Director sent each attendee a compass with the words "Chart your Course". It was such a nice memento of kicking off her term. The meeting was hosted through Zoom & was informative and fun.

My plan for 2020-2021 is to start hosting virtual meetings on a regular basis. I just must get the hardware to do it as I am prohibited from doing it on my work computer & my phone is not the best for hosting. And we will meet in person as soon as it is safe to. We also want to give a scholarship out as well.

May you all stay safe & healthy.

Respectfully submitted,

Elaine P. Sorensen, AIS, CIIP
President



*Insurance Professionals
of Orange County*

Insurance Professionals of Orange County

The Insurance Professionals of Orange County continues to be an active association of the International Association of Insurance Professionals. Throughout the year, our members participate in monthly association meetings, as well as communal meetings with our sister CA Council Associations throughout the State of California.

IPOC “kicked off” our 2019-20 Calendar year as Host Association for then CA Council Direct Christine Chandler-Tillet’s L-I-N-K-E-D Leadership Summit on Saturday July 20, 2019. IPOC President Gina Thomas Patterson presented the L-I-N-K-E-D Education-Why Do You Need It? Segment, and IPOC Secretary Regina “Gina” Lemanowicz presented L-I-N-K-E-Development on applying for award with IAIP on behalf of the CA Council of IAIP.

IPOC is traditionally “dark” in July as far as Membership Meetings, allowing our Board Members to meet and plan for the coming year. Our first panel of Guest Speakers for the year were Kevin Daley, President of West Zone of the Pure Company and Scott Justice from AIG in August with Hani Ascha, Managing Partner with Doctors Professional Liability was our Guest Speaker in September. Our attention was directed to Glendale CA on October 4 – 6, 2019 for the CA Council Meeting. IPOC Member Rima Nashashibi, Founder of Global 360 was KeyNote Speaker where she presented on sex trafficking and violence against girls and women, the statistics were shocking and all in attendance were silenced as they listened to the statistics that Rima presented on this growing problem in today’s society. Chris Falbo, Underwriting Manager, Markel Corporation followed up in November with Emerging Trends in Environmental Insurance.

We held our annual holiday social in December where our members and guests enjoyed a small gift exchange and honored IPOC’s tradition of “Giving Back to the Community”. This year, our Charity of Choice was again Mary’s Kitchen, and IPOC proudly presented Gloria Seuss, Director of Mary’s Kitchen a substantial monetary donation to this worthy charity. Several members also donated from Mary’s Kitchen’s “Wish List” of items that could be distributed to needy families. Mary’s Kitchen expressed gratitude on behalf of their clientele for the donations as there are always so many in need at this time of the year.



January 2020 brought about a new year with Guest Speaker Angela Amin, Sr Vice President, Western Region Casualty at Berkshire Hathaway Specialty Insurance and our Membership Mixer in February with Guest Speaker Joe Alvarez from CSCM Group who specializes in Cybersecurity Employee Training, Cybersecurity Awareness and Technology Cost Management who presented Cyber Security, Children & Business – The Things You Need to Know, The Things You Think You Know but You Don't.

The CA Council Inter-Coordinating Council Meeting was held in Carson at PRC Restoration Company's office with Host Association South Bay Association of Insurance Professionals on Saturday, February 8, 2020 ~ several of our IPOC members were in attendance.

Life changed for all of us in March 2020, we had little "hints" early on in January with members coming down with degrees of illness to the point where we cancelled our first ever membership meeting due to cancellations in March, and on March 25th, the Board of Directors for IPOC voted to suspend physical meetings of our association for the health and welfare of not only our members, but also the staff at our meeting establishment for the months of April and May due to the blooming COVID-19 influx. By then, most of our members who were working in offices had already been sent to work from home, and life had changed radically. The workplace became laptops on kitchen tables, coffee tables, home computing tables, where-ever space could be made – and virtual meetings via ZOOM, Microsoft Teams, Messenger Rooms and similar started mushrooming around the globe. Little did we realize at that time how long it would be before we would actually be able to physically gather together in one place and share a hug, some laughter and life stories without our smiles being hid behind a mask.

April is normally our busy year with our extremely popular Fashion Show – The Art of Style scheduled for April 18, 2020 would have been our 9th Annual with fashions furnished by WHW (Women Helping Women and Men back to work) and their retail outlet, Deja New – was cancelled due to COVID-19. Many IPOC members (including grandchildren) as well as IAIP members & their families from other associations enjoy this annual event, IPOC has great community involvement from surrounding businesses and it was great sadness that at the direction of the Governor of the State of California, WHW was ordered closed, the hotel we had reserved for the event was ordered closed – and at present time, this event has tentatively been rescheduled for Spring 2021 in hopes the COVID-19 Pandemic has subsided.



*Insurance Professionals
of Orange County*

IPOC Members continue to leave their marks of excellence in the workplace and in their daily lives. Despite the arrival of the COVID-19 Virus and resultant shut-downs, this year's Region VII Conference was held in Vancouver, WA March 12-14, 2020 – IPOC was awarded the E.C. Smith Jr Memorial Award for Community Action, and Dual Member Annette Ing-Firmeza received the CA Council Mentor of the Year Award.

For the past eleven years, IPOC has supported the Cal State Fullerton Center for Insurance Studies, and for the 2019-20 calendar year, IPOC donated \$1,000 for two (2) \$500.00 scholarships.

IPOC had a total of 20 members for the 2019-2020 fiscal year, including three (3) dual members. Our Hospitality & Reservations Chair Carolyn Espinoza sends timely birthday, get well and sympathy greetings as appropriate.

IPOC members continue to volunteer for IAIP positions outside of our local association, Regina Lemanowicz not only serves as IPOC's webmistress but is also the CA Council webmistress, and Gina Patterson is called upon to present for education purposes at many Council events.

IPOC went "virtual" on May 13, 2020 as we held our 65th Election of Officers and first-ever virtual meeting and first virtual election of officers. Our Board Members and Officers may yet become "Virtual Virtuosos" yet as we all add another skill-set to our tool-boxes for the 21st century.

IPOC is extremely grateful to our dedicated members and guests for all their support, contributions, volunteerism, and being there for one another.

In Fellowship,
Gina Thomas Patterson, CISR Elite, CPIW, DAE, CLP
Insurance Professionals of Orange County 2020/21 President



Insurance Professionals of San Gabriel Valley

Our Association held monthly meetings until Covid-19 hit the USA. It took us a bit to get back on track, meetings are now virtual/via phone. Our Association grew with three new members.

IPSGV attended the Virtual Leadership meeting, ICC Meeting and CA Council Meeting.

Our Association donated toys to the Walnut Sheriff Station “toys for tots” and we also donate to the Los Angeles Mission. We participated in the City of Hope “Walk for Hope” to raise money for their cause. We are once again participating in this year’s virtual walk.

We look forward to 2021!

In fellowship,

Sylvia Coronado, CISR, CWCS, CPIW

California Council of IAIP



San Diego Association of Insurance Professionals

This is my second term as SDAIP President and I continued the theme of **Invest in Yourself**. We are pivoting during this new normal to host virtual events.

Members are busier than ever with stay at home schedules and I am proud that they are taking time to invest in themselves by attending our virtual meetings and participating in our community outreach programs.

We continue working hard to grow our membership and retain our current members.

2019 started our year off with our fun Bunco night. Our YNP committee hosted a Day at the Races in August. We held our annual joint golf tournament in September.

In October we will turn 84! We began in 1936 as the San Diego Insurance Gals. We are hosting the 2021 CA Council Meeting in celebration of our 85th birthday.

November we held a Drive by Donation night. Members dropped off paper goods and much needed supplies for our charities.

In December last year we adopted Royal Home we had a holiday party for them with treats, we sang Christmas carols and presented them with a 60 inch TV, socks and blankets for each resident and spent time listening to their stories. All of us were deeply touched by this event as the residents suffer from loneliness.

January we hosted a membership drive. February we had Fire Captain Dave Hardenburger speak about fire awareness & preparedness. March was our St. Patrick's Day Networking Event.

The virtual format for meetings did not deter us from having regular meetings and fun events. April we hosted a virtual CBD & Cannabis 101 class and in May we hosted virtual bingo and in June we held our first virtual annual installation of officers, award banquet and scavenger hunt.

Community Outreach has always been a big part of SDAIP, we currently have a total of six charities that we support every year. For the past twelve years we have served lunch at Rachel's Women's Shelter every Saturday. We support Grossmont College and the Office Professional Training Program, YWCA Battered Women's Shelter and we have added Autism and San Diego Blind Community as our new charities three years ago.



*San Diego Association
of Insurance Professionals*

We have a team for the Alzheimer's Walk – find a cure for Alzheimer's 10 members and agents have signed up for the walk and have already raised \$4,150 we are the 2nd largest fund raising team. This is our second year participating in the walk.

We are busy planning events for this term. PWI and SDAIP partner annually for a golf tournament, in lieu of the tournament we will host a golf ball drop on October 13th to raise money for our charities. November 9th we are hosting a virtual webinar with WCIRB on regulatory changes for 2021 we will invite all CA chapters to attend this event. Our charities need support we are working hard to think outside the box to host virtual events.

Members attended the ICC Meeting in Orange County in Jan where members Julie Brown and Regina Lemanowicz were presenters. Members attended the Leadership Summit in July 2019 in Orange County Members and attended the CA Council Meeting October 2019 in Glendale, Regional Conference in Vancouver WA and the virtual International Convention.

Many thanks to the SDAIP members for their involvement and we look forward to another successful year.

In Fellowship,

*Betsy Johnson
President, SDAIP*

California Council of IAIP



*San Francisco
Insurance Professionals*

San Francisco Insurance Professionals

July 14th was the annual SF Aids Walk. Jenny Chea-Vaing led the team and held a barbeque afterwards to thank everyone for their support. It was a wonderful and heart-warming event. We raised money to support the research to find a cure. Since its inception in 1987, AIDS Walk San Francisco has inspired countless thousands of Bay Area residents to walk, donate, and volunteer in the fight against HIV/AIDS, raising more than \$90 million for organizations across seven Bay Area counties. From its humble beginnings, the event has grown into, and remains, the largest and most visible HIV/AIDS fundraising event in Northern California.

On Oct. 11th, we held our 15th Annual Golf Tournament at Chardonnay Golf Course. Marie Meadows and Annette Ing-Firmeza were co-chairs and this exciting and competitive tournament. This event is always a money maker with our hole sponsors and raffle. All proceeds from the raffle went to Alzheimer's Walk and West Coast Boxer Rescue.

Jenny Chea-Vaing, our Community Chair and her team did two annual October American Cancer Breast Cancer Walks. The first was in Walnut Creek on the 6th and the last one in Berkeley on the 26th. The money raised for this worthy cause was also to honor our members, family and friends who are in remission, or have and fighting for their lives, or have passed. We want to help further research to find a cure to end this deadly disease.

Nov 2nd was our annual Day at the Races event at Golden Gate Fields in Emeryville. The Breeder's Cup was held that day and we had a chance to learn how to bet on the horses. Jenny Schaeffler was the chair and coordinated the Best Hat Contest that proved to be a fun event. We had a race named in our honor and got to take a group photo with the winning horse and jockey. All proceeds from the raffle went to Children's Hospital.

Susana Baja represented our chapter at the annual Alzheimer's Walk on Nov. 9th in San Francisco. The money from our golf raffle was donated to this event to help in the care and support and accelerating research.

Last event of 2019 was our Annual holiday luncheon on Dec. 17th at Morton's Steakhouse. We held a raffle and raised money for St. Anthony's Dining Room. This worthy organization feeds many different types of people, such as veterans, seniors, the working poor, homeless and low-income residents, recent immigrants, recent parolees, and the mentally and the addictively ill. You can also volunteer to serve or prep food which we have done in the past.

In March, other than announcing our Slate of Officers, there wasn't anything else but the pandemic to keep us down.



*San Francisco
Insurance Professionals*

We had to cancel the May Industry Luncheon. We received our initial scholarship funds back from IEA as they are no longer in operations. We have deposited this money into a separate account just for the scholarship fund. We are working on the guideline and will announce in the coming months.

Had to cancel our SF Giants Tailgate and Game Event, but we will be all set for the 2021 season with Maritza Portillo as the chair. On June 23rd we held our first virtual Installation with Laura Gutierrez as our Installation officer. Our Slate of Officers are: Marie Meadows, President; Allen Shiu, President-Elect; Ben Potter, Vice President; Tina Kong, Secretary; Cassandra Yu, Treasurer; Alexis Maxwell, Maritza Portillo and Jenny Schaeffler, Directors and Annette Ing-Firmeza, Past President.

We would like to especially acknowledge our members, sponsors and supporters during the 2019-2020 term, for without them, we would not be where we are today – a strong, united chapter! Annette Ing-Firmeza, I just want to say that you did a wonderful job as our President for the past two years and I will not forget the lessons learned during your reign.

Yours in Fellowship,

Marie Meadows

International
Association of
**Insurance
Professionals**

California Council of IAIP



South Bay Association of Insurance Professionals

During my 2019-2020 term as President we started off with a bang and then COVID hit! So here it what we got done before the pandemic stopped us in our tracks:

On August 13, 2019 we held our Bi-Monthly Dinner Meeting on the topic of Pet Insurance 101 from special guest speaker Kerry O'Hara, PhD at the Hilton Garden Inn located in Redondo Beach where we learned the importance of having your pets insured from an early age to mitigate major veterinary costs in the future.

In September we participated in a new philanthropic endeavor with the Walk to End Alzheimer's in Redondo Beach where we were able to get a nice size group together to walk in purple and collect a good amount of donations for this very important cause!

On October 9, 2019 we held our Bi-Monthly Dinner Meeting on the important topic of Knowing & Understanding your Social Security & Medicare Options for 2019 & 2020 presented by past member Varnessa Aaron-Seymour at the Hilton Garden Inn located in Redondo Beach.

In November we participated in our yearly philanthropic endeavor in Long Beach for the Long Beach Basket Brigade on November 16, 2019 at the El Dorado Park Senior Center. This great cause provided Thanksgiving meals to local area families in need and have been making a difference since 2005. SBAIP members volunteered and joined others to help build 2000 baskets that were delivered within the community.

On December 10, 2019 we held our Annual Holiday Dinner Party at the Hilton Garden Inn located in Redondo Beach where we played holiday bingo, collected items for charity & enjoyed each other's company with some fun photos!

On January 16, 2020 we started the new year with a 3 hours CE Course with our Dinner & A Class + Dessert series on Entertainment, Sports, and Special Events **Insurance. All You Need to Know to Get it Right.** Taught by our very own Mark Jarobe, CPCU, ARM, RPLI at PRC in Carson.

On February 11, 2020 we held our Bi-Monthly Dinner Meeting on the Topic: Using Artificial Intelligence & Records to Lower Risk & Litigation Costs with Speaker Joe Salvati, CEO of Arcuity ai, Inc. at the Hilton Garden Inn located in Redondo Beach.



Then on February 20, 2020 held our Dinner & A Class + Dessert on the topic of The Interplay of Indemnity, Insurance, and Limitation of Liability from a Risk Manager's Perspective presented by Simon Keshishian, JD, MDR, CLCS, CLMP, RIMS-CRMP, Risk Counsel & Sr. Director of Risk Management of Red Bull North America, Inc.

In April 2020 we participated with PRC again in the Virtual Walk for Kid to Benefit the Ronald McDonald House of Long Beach, which we look forward to doing in the future, but hopefully next year!

Then after 3 months of waiting for a miracle to meet in person again, we ended up having our Election of Officers via Zoom on June 16, 2020, which was a success keeping our same officers in place for the 2020-2021 term, where we hope to have success with virtual meetings until we can meet in person when it is safe again!

In Fellowship,

Sarah Jane Jara, CLP, 2019-2021 President

California Council of IAIP