



CPCU

PHILADELPHIA CHAPTER
THE SOCIETY OF CHARTERED PROPERTY
& CASUALTY UNDERWRITERS

CHAPTERGRAM

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2nd Franklin Award Presented to Mariellen Whelan; Thacher Longstreth Keynote Speaker

The Second Annual Philadelphia Chapter CPCU "Franklin Award" was bestowed upon Mariellen Whelan, Executive Vice President of the Insurance Society of Philadelphia by Chapter President Phil Spinelli at a special luncheon in honor of the occasion held at the Bellevue-Stratford Hotel on March 14th.

In presenting the award, President Spinelli cited the many reasons why Dr. Whelan was selected as this year's recipient keying in on her role as a former Education Director and now as Executive Vice President of the Insurance Society of Philadelphia.

The award, which was instituted and presented by the Chapter last year to Edwin Overman, Ph.D., CPCU, CLU, recognizes outstanding achievement and contribution to the insurance industry in the Delaware Valley. Leadership, continuing education, promotion of insurance, external achievements, research efforts, innovation and specific achievements which benefit the industry are among some of the criteria in which nominees for the award are judged.

In accepting the award Dr. Whelan thanked the Chapter for recognizing her efforts, the Board of Governors of the Insurance Society for their support over the years and providing for the continuing education needs of the insurance industry within the Delaware Valley. She also thanked the instructors who teach the various courses offered by ISOP for their efforts and stated that she shared the commitment of last year's recipient, Dr. Overman, to provide for the educational needs of our industry.

Honored Guests at the head table were G. Victor Hallman, Ph.D., J.D., CPCU, CLU, Dean of Examinations, American Institute/IIA who delivered the Invocation. James W. Hamilton, CPCU, CLU, Exec. Vice Pres., Society of CPCU, Boyd Bruce, CPCU, Reg. Vice Pres., Society of CPCU, A. Brent O'Brien, President Independent Insurance Agents & Brokers Association of Phila. & Suburbs, and Fran Quinn, President Delaware Valley Chapter RIMS.

The Keynote Address was given by W. Thacher Longstreth, Councilman-at-Large for the City of Philadelphia to the approximately 160 people who attended the affair. Mr. Longstreth began his address by taking the audience through a comical parody of Philadelphia politics. He then discussed the impact of the media, inflation, women and lawyers in today's society and attempted to stimulate thinking on what our profession is today and where we might be in the future. In citing the attorneys' role he pointed out that in the U.S. some 600,000 lawyers serve a population of 230 million people while in Japan 6,000 lawyers serve 110 million people.

One of Thacher's humorous quotes was "Women are now given an opportunity to compete with men and they are beating our brains out; more and more women are becoming company officers and it is only a matter of time when 99% of the work force will be women and then they will have to say 'what will we do with all of the unemployed males—domesticate them?'"



Chapter President Phil Spinelli presents the 1984 Franklin Award to Mariellen Whelan.

New Board for 1984/85: Spinelli Re-elected Chapter President at April Meeting

Breaking with tradition, current Chapter President Phil Spinelli, CPCU, was again elected as President for the 1984/85 year. The Nominations Committee, chaired by Immediate Past President Pete Palestina, CPCU, assisted by Past Presidents Iles Wauhup, CPCU and Don Cook, CPCU, announced that with the recent resignation of former 1st Vice President Steve Graves, CPCU, the Board would be left with only 3 members with more than one year of experience if Spinelli terminated. This was determined to "not be a healthy situation" according to Palestina who further stated that "Phil's staying on as President would lend stability to the Board and also gives an opportunity for Phil to implement and refine programs and policy that will have long term benefits to the Chapter."

All of the Nomination Committee's slate of candidates were elected and they are as follows:

President—Philip N. Spinelli, CPCU
First Vice President—Vincent D. Phillips, CPCU
Second Vice President—Pamela H. Godwin, CPCU
Secretary—Albert P. Federico, Jr., CPCU
Treasurer—John J. Kelly, CPCU, CLU
Director 2 years—Joseph M. Mc Nasby, CPCU (1986)
Director 2 years—Anne Sechler Kopanski, CPCU (1986)
Director 1 year—Frederick Roe, CPCU (1985)

N. B. Raymond E. Lindsey, CPCU, CPA is currently a Director whose term does not expire until 1985.

Congratulations to these individuals who will be sworn in at the June Annual Business Meeting. Their offices will take effect beginning July 1, 1984 and we have every confidence that they will carry on the work and programs of the Chapter in a professional manner.

The President's Corner



Philip N. Spinelli, CPCU
President

An apology is not the usual way to begin a message but apologize I must. Apologize for what you say? Well, every once in a while this thing we call the human process has this unique ability to accomplish the unusual. For example, Dr. Frankenstein's sum of the parts; Dr. Jekyll and his sensitive Hyde. And now the Philadelphia Chapter has created the Chaptergram Monster. Yes, we should have known better, but we recently appointed Pete Palestina the new editor. Give us strength.

On the upbeat side, we had a terrific turnout for the Franklin Award Luncheon. Mariellen Whalen was a most worthy recipient and our special guest speaker, Thacher Longstreth, absolutely super. This award, in just two short years, has really become a prestigious event and an absolute positive image builder for the CPCU designation.

A key activity in the upcoming weeks will be our spring social. In the past, many of the members have expressed desires for a social which would permit them an opportunity to get to know each other in a more cordial environment. Our planned dinner dance will, without doubt, satisfy those desires. As you know from our announcement, the date is Friday, June 22, at the Eagle Lodge Country Club. Those members and guests interested in playing golf will have the opportunity to experience a championship course. You need to let us know in advance so that we can make arrangements. (Green fees will be the responsibility of the individual players.) Obviously, early responses will be to our advantage since participation will be limited.

In closing, I should like to leave you with a celebrated oracular utterance. CPCU is contiguous to rectitude or loosely interpreted, CPCU is next to godliness. Ciao!



Dr. Mariellen Whalen, recipient of the 1984 Franklin Award

Regional Officers Conference Held March 9, 10

This year's ROC was held in Pittsburgh on March 9 and 10 and the Philadelphia Chapter was represented by 2nd Vice President Vince Phillips (Phil Spinelli and John Kelly were snowed out). In addition, there was a Public Relations workshop on March 8 which was attended by Vince. Much information was exchanged between members of the Northeast Region and Vince has brought back with him working ideas to incorporate into future Chapter policy and programs. We will report in more detail in our next Chaptergram.



2nd V.P. Vince Phillips shows his stuff at the Pittsburgh Regional Officers' Conference.

February Meeting Recap Dr. Robert LeClair Addresses CPCU's and CLU's

At the annual joint CPCU/CLU meeting held on February 21st, Dr. Robert T. LeClair discussed as his topic "Success Factors in Financial Planning." This year's joint meeting was attended by some 100 CPCU's and CLU's who heard Dr. LeClair, Program Director of the School of Advanced Career Studies at The American College, run down his list of 10 factors of success used in rating financial planning participants. The factors discussed were technical knowledge, product range, client contact, client empathy, continuity of service, consumer reputation, scale of operation, geographic distribution, record keeping, and regulatory environment. These 10 success factors were then rated against 5 industry groups involved in financial planning; namely, commercial banks, brokerage firms, insurance companies, law firms and accounting firms. A worksheet was passed out so that the audience could rate these factors and industry groups for later comparison to the ratings developed by Dr. LeClair. Dr. LeClair's ranking showed that brokerage firms and commercial banks had the highest ranking while law firms came in last.

During his discussion Dr. LeClair pointed out that "today, there is an emphasis on life planning instead of death planning." He went on to emphasize that "financial planning is an ongoing process involving among other things, working with client's goals and objectives, setting up the goals, controlling the plan and then a review process whereby the plan may be modified if necessary." He concluded his discussion by stating that "retention of clients is going to be very important in the future . . . middle size companies are going to be hurting because they are too small to be everything, yet too large to be flexible enough to change . . . that government will no longer be protecting the weak but rather will make legislation encouraging even more competition."

Dr. LeClair is co-author of "Money & Retirement—How to Plan for Lifetime Financial Security" and author of "Money Manager" a computer software system for financial planning.

From the Editor

My thanks to President Spinelli and the Board for appointing me the new editor of your Chaptergram. I promise that we will provide you with good stories, recaps of meetings and information on what has happened, what will be happening and a lot of other things. We want you to be proud of the Chaptergram and encourage use of it to provide our members with your ideas, so please feel free to call or write me at any time with stories or gossip. You may write me % The Walsh Company, 1700 Race Street, Philadelphia, Pa. 19103 or call 564-2800. My home phone number is 322-1153.

You will notice the Chaptergram will be more expansive so that you will be informed as much as possible on activities. It will be published quarterly on a regular basis in September, December, March and June. Hopefully, if the Chapter becomes more solvent we may be able to publish it at more frequent intervals.

In addition to the various stories and meeting recap articles, we will have as a steady diet The President's Corner, Editorial Column, From The Boardroom, The Grapevine, Short Notes, Coming Up, Business and Finance, and, if space permits, The Quarterly Question, Helpful Hints, Blasts From The Past and a Cartoon. All this and pictures too.

Of course, I am only one person, so in order to make this Chaptergram live up to expectations I will need your support. Please call me with newsworthy items, send me articles, photographs (black & white please), complaints, who left the area, whatever. Also, if you are interested in writing a regular column or piece or if you would like to tackle your own cartoon let me know as we would love to have you. Remember, this is your Chaptergram and it can only be as good as our membership makes it. Let's all help to make our Chaptergram the best of all the Society's Chapters.



John Kelly, Pam Godwin, Phil Spinelli, Mariellen Whelan, Al Federico and Vince Phillips sharing a moment after the Franklin Award Luncheon.

A LEGEND

One night in ancient times, three horsemen were riding across a desert. As they crossed the dry bed of a river, out of the darkness a voice called, "Halt!"

They obeyed. The voice then told them to dismount, pick up a handful of pebbles, put the pebbles in their pockets and remount. The voice then said, "you have done as I commanded. Tomorrow at sun-up you will be both glad and sorry." Mystified, the horsemen rode on. When the sun rose, they reached into their pockets and found that a miracle had happened. The pebbles had been transformed into diamonds, rubies and other precious stones. They remembered the warning. They were both glad and sorry—glad they had taken some, and sorry they had not taken more.

AND THIS IS THE STORY OF INSURANCE.

January Meeting Recap John T. Biezup, Esq. Addressed Chapter

At the January 10th meeting, John T. Biezup, Esq. addressed Chapter members on the topic of "Recent Developments in the Longshoremen's and Harbor Worker's Compensation Act." Mr. Biezup, a partner in the firm of Palmer, Biezup & Henderson of Philadelphia, enlightened the audience with a history of cases and court decisions in this controversial area of our business. John also discussed the latest legislative changes, the pros and cons, predicted the future and fielded an array of questions. All those CPCU's who attended learned a great deal about this often confusing area of workers compensation.

Recognition for Research Projects



At the January meeting President Spinelli presented certificates of appreciation to those membes who helped develop last year's research projects. Standing from left to right are: John Griffin, Terry Macko, Mike Donato, Homer White and Al Woodward. Other recipients who were not able to be present were: Mike McCarthy, Ed Levy, and Bob Steere.

The On-Going Saga of "Seepy Seeyou"



From the Boardroom

Steve Graves, CPCU resigned as the Chapter's 1st Vice President in late January. The Board and the Chapter wishes Steve well and thanks him for the service he has given us as 1st Vice President, 2nd Vice President & Treasurer. Steve was also Chaptergram editor for the last two Chaptergrams.

The Board elected Pete Palestina, CPCU to fill out the unexpired term of the 1st Vice President office vacated by Steve Graves, CPCU until the new officers and directors elected by the membership are installed in office on July 1, 1984. Pete was also appointed new Chaptergram editor (see related story).

John Kelly, CPCU is chairing a committee to research a Chapter recognition program whereby a member participating in Chapter activities in various capacities (committees, attending meetings, seminars, research projects, etc.) can be recognized for their contribution. Further details will be published as they develop.

The 1983 Chapter hosted Channel 12 Telethon was such a success that the Board is investigating the possibility of doing it again in 1984.

Mariellen Whelan attended the February 16th Board of Directors meeting to discuss the Insurance Society of Philadelphia's current activities relative to continuing education. She also shared local statistics with us relative to the people enrolled in ISOP courses (CPCU and IIA) and how they have fared. She would like to see the Chapter give input on recommending and encouraging qualified and competent CPCU's for teaching positions of ISOP's various courses and also offered the services of ISOP's speakers bureau.



Former Flyer, and now insurance man, Ed Van Impe at Franklin Award Luncheon. Is he wondering what he's doing in the insurance biz or is he reflecting on his days as a Hockey Star?

The Grapevine

Richard Gies, CPCU, CLU, retired from Harleysville Insurance Co. after 21 years. Rich retires as Vice President of Human Resources. We hope you enjoy your retirement Rich.

Congratualtions to Dennis Hyland, CPCU, William F. Norton, CPCU and Richard V. Strouse, CPCU, all of Harleysville Insurance Co. who were promoted to Assistant Secretaries of the Co.

Congratulations to Dennis Hyland, CPCU, William F. Norton, CPCU and Richard V. Strouse, CPCU, all of Harleysville Inphia Contributionship.

Congratulations to Harry C. Niemann, III, CPCU who was promoted to Vice President of Personal Lines Underwriting at the General Accident Insurance Co.



Thatcher Longstreth addresses Franklin Award Luncheon crowd.

Coming Up

Tuesday, May 15, Joint RIMS/CPCU Meeting will be held at the Downtown Club, Felix Clumin will be the guest speaker. Your guests are welcome to attend.

Tuesday, June 12, Annual Business Meeting and installation of 1984/85 Officers & Directors. Philadelphia Centre Hotel, 8:30 A.M. This meeting will be closed to Phila. Chapter CPCU's only.

Friday, June 22, Annual Chapter Spring Social. Dinner Dance at the Eagle Lodge.

October 14-18 National Annual Meeting, Seattle, Washington.

November 8—"I" Day, Bellevue-Stratford Hotel.



Thatcher Longstreth caught in middle of discussion between Phil Spinelli and Jim Hamilton at Franklin Award Luncheon.

should have said "Congratulations to our Chapter Auditor Harry C. Niemann, CPCU who was elected to Vice President of the Philadelphia Contributionship"