

New Orleans Rebuilding – Still a Long Way to Go

III PARTNERS WITH LOCAL CHARITIES

Member companies of International Insurance Institute have been gracious in offering to help the great city of New Orleans recover from Hurricane Katrina. The largest issue for many is the concern that donated money will not reach the people who need it most.

That’s why III has chosen a few specific charities, operated by St. Martin’s Church. Members can donate with confidence that the money given will reach the people intended.



St. Martin’s houses and feeds these volunteers while they are in New Orleans. Volunteers prepare and serve meals, and arrange for bedding in donated space.

All donations are tax deductible, and any person or organization making a donation will receive a statement of funds donated.

Helping Hands – Housing Ministry Volunteer Assistance. The devastation in New Orleans has touched many people. Some of those people have even decided to come to New Orleans to help rebuild. Amazingly, many of the people who come have limited means themselves, and arrive without the funds to pay for lodging and meals.

St. Martin’s houses and feeds these volunteers while they are in New Orleans. Volunteers prepare and serve meals, and arrange for bedding in donated space.

Dragon Café—The tremendous

expense of clean-up and home rebuilding has left many families with little or no money for even basic necessities, such as food and clothing.

Funds donated here go directly to purchase food, prepared and served by St. Martin’s volunteers to anyone hungry and in need of a meal. The daily labor is still 100 percent on a volunteer basis.

While the early days of the program received large donations of food, those donations have largely dried up and food must now be purchased.

Ella Dalhonde—This public school serves children from Pre-K through 5th grade. Due to the strain of rebuilding, children come from a pressure-filled home where both parents work, often at more than one job. These parents truly want a better life for their children and are working towards that goal. Unfortunately they are not able to

participate fully in the regular school activities. Volunteers set up special events throughout the year and assist in tutoring the children.

Sponsorships available

Individual Sponsors

- \$1 - \$25 Special Friend
- \$26 – \$99 Supporter
- \$100 - \$250 Life Saver

Corporate Sponsors

- \$250 - \$499 Enthusiast
- \$500 - \$999 Devotee
- \$1,000 - \$2,499 Guardian
- \$3,000 and above Rescuer

If you would like to assist III in helping the people of New Orleans, make your check payable to St. Martin’s Church and mail to III – St. Martin’s Fund, 2112 Belle Chasse Hwy., #11-319, Gretna, LA 70056. Be sure to specify which program you wish to sponsor. All donations are tax deductible.

2nd Annual CLAIMS EDUCATION CONFERENCE

PRESENTED BY



International
Insurance
Institute, Inc.



CEC is Headed to the Beach! May 15-18, 2007

Marriott Resort at Grande Dunes
Myrtle Beach, South Carolina

Register by
3/01/07
and
save \$100!

The Claims Education Conference is a straightforward, educational conference. Nothing but actual claims training will be presented in a down-to-earth, practical way – and you WILL leave having learned what you came to learn.



Here is what attendees had to say about the 2006 Claims Education Conference:

“The content of the presentations was great! The staff has awesome presentation/speaking skills.” ~ *Tonya Bernhard, Liberty Mutual Insurance*

“Best Seminar I have ever attended.
Outstanding staff, outstanding topics.”
~ *Brian Baker, Cincinnati Insurance Co.*

“Great presentations. Look forward to seeing
you all again in South Carolina!”
~ *Jane Ische, United Heartland*



For more information or to register for the conference
visit www.claimseducationconference.com
or call (952) 928-4642.

An Adjuster Track and a Manager Track are offered throughout the entire conference. There's something here for everyone!

BONUS – The entire program has been approved for continuing education (C.E.) credit in the states that require C.E.

CONFERENCE PROGRAM

Tuesday, May 15th

2:00 p.m. – Registration and Exhibit Hall Set-up

5:30 p.m. – Welcome Reception in Exhibit Hall

Wednesday, May 16th

7:30 a.m. – Breakfast in Exhibit Hall

9:00 a.m. – Breakout Sessions

Adjuster Track

- *Awesome Claims Customer Service for Adjusters*

Manager Track

- *Awesome Claims Customer Service for Supervisors and Managers*
 - *More Time Management Skills for Claims*
- 12:00 noon – Lunch and 99 Second Exhibitor Fun Talk

2:00 p.m. – Breakout Sessions

Adjuster Track

- *Negotiating with Attorneys*

Manager Track

- *Motivating Your Claims Team*
- *Interviewing Tips to Hiring Great Adjusters*

5:00 p.m. – Reception and Door Prize Giveaway in Exhibit Hall

Thursday, May 17th

7:30 a.m. – Breakfast in Exhibit Hall

9:00 a.m. – Breakout Sessions

Adjuster Track

- *Empathy Training: Gaining Credibility with Customers Through Understanding and Listening*

Manager Track

- *Ethics and Fair Claims Practices Handling*
- *Basic Presentation Skills: From Remembering to Breathe to Having Fun*

12:00 p.m. – Optional Activities: Golf Tournament at Grande Dunes or Carolina Jeep Safari in the afternoon. Medieval Times in the Evening.

1:00 p.m. – Exhibitor Tear Down

Friday, May 18th

7:30 a.m. – Breakfast

9:00 a.m. – Breakout Sessions

Adjuster Track

- *Effective Recorded Statements*

Manager Track

- *Managing Change*

11:30 a.m. – Closing Luncheon

Optional Activity: Horseback Riding Along the Beach.

Enjoy the Sun, Surf, and Sand!

Myrtle Beach Marriott Resort at Grande Dunes

8400 Costa Verde Drive
Myrtle Beach, South Carolina 29572
Phone: (843) 449-8880
Fax: (843) 449-8669
www.myrtlebeachmarriott.com

The Myrtle Beach Marriott Resort at Grande Dunes is Myrtle Beach's only four-diamond oceanfront hotel. As part of the upscale, Grande Dunes community, a 2,200-acre, plantation-style residential and leisure development, the Myrtle Beach Marriott Resort has more amenities than any other destination in the Carolinas. Activities include championship golf, Tennis & Fitness Center, large tropical beachfront pool with waterslide and a European Spa with indoor pool. In addition, there is always the simple but priceless pleasure of sitting on the pristine beach and soaking up the South Carolina sun.

Once you have registered for the conference, call the hotel for reservations at (843) 449-8880 or (800) 228-9290 and mention that you are with the Claims Education Conference. The regular room rate of \$219.95 has been reduced to \$159 per night (plus tax) for Claims Education Conference attendees from May 11, 2007 - May 19, 2007. To receive the special reduced rate, individuals must make reservations by April 23, 2007.

Space is limited - last year sold-out! Don't be left out - make your reservations today!

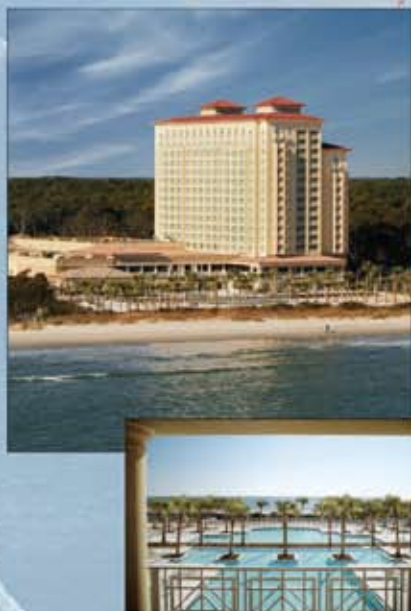
Exhibit and Sponsorship Opportunities Available

If your company works with or services the Claims Industry, consider a conference sponsorship and/or exhibit booth! The Claims Education Conference is a perfect opportunity to showcase your products and services. A limited number of exhibit spaces have been set aside, and several sponsorship levels and benefits are offered – so you can design a sponsorship to suit your corporate style and budget. Call the Claims Education Conference Office today at (952) 928-4642 to see what sponsorships are still available. Or go to the Claims Education Conference website for a complete list of sponsored events/items and benefits, www.claimseducationconference.com.

Register Today and Save!

Conference Registration Fee - \$575 (\$675 after 3/01/07)

Your registration fee includes all breakfasts, lunches, receptions, and handout materials – and a luxury beach towel and beach kit!



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STUDENT OF THE QUARTER

What Makes an Adjuster Awesome?



Alex Palmer
Casualty Master
Claims Representative
Allied Insurance

Spend a couple of minutes speaking with Alex Palmer, and you can tell that she loves what she does and puts her heart into it.

Alex began her career in the insurance industry in 1999 as a customer service representative and then moved up to customer service supervisor. Wanting to further her career in insurance, in 2001 she attended claims classes and became a claim adjuster. She joined Allied Insurance in 2003 as a casualty senior claims representative. In March 2003, she was promoted to casualty master claims representative and has recently

been promoted to the field.

When asked what she likes best about her new position, she said, “As a field adjuster, I enjoy meeting the customers face-to-face. This way, it’s more personal and they are not just a name.” She says she enjoys being a claim adjuster and has grown to understand that her job is not just handling claims but also being the best customer service provider possible.

In a recent Awesome Claims Customer Service class, Alex demonstrated her personal focus of self improvement by practicing and applying the new high-level interpersonal skills she learned in class. Her co-workers agree that her drive and enthusiasm are key attributes to her success. She is very organized and as an added bonus, she’s fluent in Spanish.

Alex credits her former manager, Wendi Hatfield, with having the most influence on her, and in shaping her career. Carl Panico, claim director for Allied Insurance, commented, “Alex sees training for what it truly is—the opportunity to achieve her goal of improving herself.”

Outside of the job, Alex loves spending time with her children and taking her dog for walks. Her future goals are to attain a degree in business administration, continue on with her success in the insurance field, and obtain her CPCU certification.

Alex’s advice to others is to not procrastinate. This fits right in with her favorite quote by Elbert Hubbard, “The best preparation for good work tomorrow is to do good work today.”

TRAINER OF THE SEASON

Variety and Job Appreciation Make an Excellent Trainer



Mike Dicecco
Claims Trainer Specialist
Royal Bank of Canada
Insurance

As an avid collector of more than 50,000 antique phonograph records, numerous

jukeboxes, gramophones, and even classic cars, Mike Dicecco understands the organizational skills needed to be successful in the claims environment. In addition, “Excellent interpersonal skills and a desire to help in a time of need are essential. A good sense of humor helps too!” he said. This is the philosophy of a man who’s had extremely varied and rewarding positions throughout his career in the claims industry.

Mike began his insurance career in 1979, shortly after graduating from the University of Toronto. He has held adjusting positions in physical damage, bodily injury, accident benefits (similar to PIP), homeowners’ property, general and product liability, and highly protective risks. In addition, he’s been a road field adjuster, a multi-line supervisor, senior supervisor, assistant claims manager, bodily injury consultant, and presently, a claims trainer specialist. He started at his current company, RBC (Royal Bank of Canada) in 2003 and said, “it’s been heaven ever since.”

Having worked in various areas of claims, he has a great appreciation for his job and what it entails.

“I thoroughly enjoy doing training in

a variety of areas. This helps keep my job both interesting and challenging. Training people that are new to the insurance industry is extremely rewarding. It’s great to help them learn the job and then progress to much higher levels of performance,” Mike said.

Mike attributes his success in claims to his desire to help and interact with people. “Claims is essentially a field in which we provide customer service, to both our clients and co-workers. It is always interesting in terms of the types of losses people have, and ‘gray’ areas of coverage. Just when you think you’ve heard it all, there’s a new and intriguing claim reported. It’s a fascinating field to be in, and for the record, it’s been a great career,” he said.

MANAGER SPOTLIGHT

A Little Integrity Goes a Long Way



**Rich Morton, AIM,
ARM, SCLA
Senior Regional
Claims Manager
Universal Underwriters**

Are you willing to go the extra step and take the extra time to get it right?

Rich Morton, senior regional claims manager at Universal Underwriters in Framingham, MA, is, and believes it has played a key role in his success in the insurance industry.

Rich began his career in 1976 as a field road adjuster. Over the course of his career, he has held the positions of trial adjuster, supervisor, home office examiner, and claims manager. He joined Universal Underwriters in 1988 and says the accomplishment of which he is most proud is serving in his current position.

“I love the variety and daily challenge of the job, as well as the interaction with my insureds, sales, and underwriting,” Rich said.

He also loves to run seminars on discrimination, truth and lending, and loss prevention. His broad background in many types of claims and coverages is only one of his strengths. His ability to motivate others is another.

That motivation factor stems from the influence of Bill Pierson, his original supervisor at Liberty Mutual.

“Bill taught me to enjoy the job and find something positive in every case. He taught me that we have the ability to assist someone who has been harmed, whether it’s a claimant or an insured, they are all our customers,” said Rich.

The most important thing he has learned in his career is that one should never be satisfied with how much he/

she has already learned.

“There is always a way to be smarter, better, and more in tune with the industry. Always be open to learn and benefit from your experiences,” Rich said. “Treat your position as a career and not a job. Push yourself to do better, learn more, accept and relish the daily challenge. Each call—each claim, is an opportunity to assist others.”

As for Rich Morton’s future ambitions, he has one more exam to complete before receiving his CPCU certification.

“Each day is a challenge with daily changes, with new opportunities for growth and promotion, and I just want to keep my options open,” he said. His philosophy is, “Don’t make decisions because they’re easy, don’t make them because they’re cheap, don’t make them because they’re popular; make them because they’re right,” a quote by Notre Dame’s Father Theodore Hesburgh.

new courses

Effective Recorded Statements

This full day, eight-hour class offers invaluable skills for the claims person to obtain the most effective recorded statement from any person of interest in a claim. All skills will be reinforced with the use of practice scenarios and role-plays to increase effectiveness of this very important evidence-preserving function.

It is a highly interactive class that gives the student techniques for laying a solid foundation when taking statements. All types of claims situations will be reviewed to emphasize the importance of this everyday task of claims handlers.

Many times a well-experienced claim representative finds

that after conversing with a party at length, they did not either record the conversation or failed to ask pertinent questions. In this class they will discover how proper preparation, development of a strategy, and effective listening skills can produce a valuable piece of the claims process.

Here are the topics students will learn:

- Gaining Trust and Cooperation of the Customer
- Avoiding the Claims Hammer
- When and Who to Interview
- Proper Preparation Techniques
- Preparation of the Interviewee
- Effective Listening and Allowing Silence
- Legal Issues of Statement Taking