



RICHMOND CHAPTER

# International Society of Certified Employee Benefit Specialists

August 2007

RICHMOND CHAPTER

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(804) 827-1689

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(804) 422-6723

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*Cathy Kercheval*  
(804) 628-3724

## President's Message

As summer winds down and kids head back to school, it's time to gear up for a busy end-of-year schedule for our local CEBS chapter.

Following on the heels of a very successful half-day fundamentals program earlier this summer, we have a full slate of events planned for September through our Annual meeting scheduled for November 17<sup>th</sup>.

Our next scheduled event is our end of the summer social scheduled for September 6<sup>th</sup> at the Westwood Racket Club. This is a great opportunity to come out and meet with other benefit professionals in an informal setting as well as acknowledge the accomplishments of our new graduates, Fellows and Ten-Year members. This event is open to all chapter members and their guests. The event is free for chapter members and \$5.00 for guest.

Our next major educational session is our Full-Day Fundamentals program scheduled for September 27<sup>th</sup> at the Westwood Racket Club. This year's program will focus on Retirement issues including both Health & Welfare as well as Retirement plan topics. The cost of the program is \$125 for chapter members and \$165 for non-chapter members. This program will provide 6 hours of continuing education credits for licensed representatives. Invitations will be sent out in September, but please mark your calendars now and plan to attend this event.

In addition to making arrangements for the rest of this year's meetings, the Board named a "Nominating Committee" to prepare the slate of officers, board members and committee chairs for next year. Anyone interested in joining the board or chairing one of our committees (Education, Publicity, Sponsorship or Membership), please contact me or any other member of our current chapter officers. The slate of new officers will be presented to the chapter by the end of September. We certainly welcome all nominations and hope that more of our members, both new and old, will consider a more active role in our chapter next year.

The ISCEBS 26<sup>th</sup> Annual Employee Benefits Symposium will be held in Seattle, WA from September 16<sup>th</sup> through September 19<sup>th</sup>. Several of our members are planning to attend this event; and as in years past, we will be hosting a dinner for local members attending the symposium on Monday evening, September 17<sup>th</sup>. Please let me or Brian Marks know if you are planning to attend the National Symposium and would like to join us for dinner that evening.

Finally, I would like to thank our Board and Committee Chairs for all of their hard work this year. We have enjoyed some great educational sessions so far this year and our membership continues to remain strong.

Enjoy the rest of your summer and I look forward to seeing you at one of our upcoming CEBS events.

## Social Event

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### Please Join Us for the September 6, 2007, Summer Social

You are invited to a special meeting of the Richmond Chapter ISCEBS.

Location: Westwood Club, Wimbeldon Room  
6200 Club Lane  
Richmond, VA

Date: Thursday, September 6, 2007  
5:00 p.m. to 7:30 p.m.

Events: 5:00-5:30 Registration, Networking & "Open Board"  
Meeting

5:30 10-Year Chapter Members, New CEBS and CEBS  
Fellow Recognition Presentation

5:30-7:00 Cocktails and Appetizers

Who Invited: Chapter members, spouses, and guests

Cost: No cost to members; guests are \$5 per person.

Please RSVP: Mike Heunnekens, Chapter President  
MikaelHeunnekens@sunlife.com  
(804) 339-9166

or

Gary Powers, Education Chair  
Gary\_S\_Powers@aon.com  
(804) 320-8438

## Educational Event

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### Please Join Us for the September 27, 2007, Full-Day Educational Event

Title: The Basics of Retirement Income and Retiree Health Plans

Speakers:

- Michael Whalen, Mercer HR Consulting
- Evelyn Small Traub, Troutman Sanders, LLC
- Amy Reynolds, Mercer HR Consulting
- Randy Ricker, Optima Health Plans
- Merian Sallings, City of Richmond
- Gilliane Isabelle, AIG/Valic

Continuing Education Credits: You will receive 6 CE credits by attending this session (1 for law)

Date and Time: Thursday, September 27, 2007

7:45-8:30 a.m.	Registration and full breakfast
8:30-9:30 a.m.	Fundamentals of Retirement Plans
9:45-10:45 a.m.	Legislative and Compliance Update
11:00-12 noon	Retirement Plan Solutions for Problems Facing Today's Employers
12-1:00 p.m.	Lunch
1:00-2:45 p.m.	Opportunities and Challenges in Medicare Advantage
3:00-4:00 p.m.	Advice and Managed Accounts in Employer-Sponsored Plans

Location: Westwood Racquet Club  
6200 West Club Lane  
(804) 288-6028

Cost: \$165 (\$125 for members of the Richmond Chapter of ISCEBS)

Please RSVP: By September 25, 2007 to Susan Landside  
(smlandsi@sentara.com or 804-510-7442)

Questions: For questions concerning the program, contact Sharon Jahn, CEBS, at 804-827-1689, or e-mail SJahn@mcvh-vcu.edu.

Make checks payable and mail to:  
Richmond Chapter-ISCEBS  
P.O. Box 6513  
Richmond, VA 23230

*Note:* Meeting fees are non-refundable unless cancellation is received before September 25, 2007. **Unpaid no-shows will be billed.**

**Still Time to  
Join for 2007**

There is still time to submit your renewal and dues to the national ISCEBS office. Our membership dues are the main source of income for the Richmond Chapter and are only \$40 a year! Come join us this year and learn the newest update and trends for benefits as well as meeting other local people in the benefit field.

Please remember that CEBS graduates must also join the national ISCEBS in addition to our local chapter. You can renew your membership online, by mailing your application directly to the ISCEBS office in Brookfield, Wisconsin, or by faxing it.

[www.iscebs.org/forms](http://www.iscebs.org/forms)

Fax to: 262-786-8650

Or mail to:

ISCEBS  
P.O. Box 209  
Brookfield, WI 53008-0209

If you know of anyone who may be interested in joining or learning more about the ISCEBS Program, please let me know and we will be more than happy to contact them.

Cathy Kercheval  
Membership Chair  
ckercheval@mcvh-vcu.edu  
804-628-3724

## Upcoming Events

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### Mark Your Calendar For The Following Upcoming Chapter Events in 2007

**October 25, 2007  
Luncheon Meeting  
Westwood Club**

Speaker: Rick Fisher  
Staywell Health Management  
Topic: Health Management Design and Communications

**November 15, 2007  
Breakfast Meeting  
Westwood Club**

Annual Meeting