



RICHMOND CHAPTER

International Society of Certified Employee Benefit Specialists

February 2008

RICHMOND CHAPTER

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President's Message

Welcome to 2008! What a great year we had in 2007 and we are all very excited about the many exciting opportunities that we will have in 2008 for learning and growing in our profession. The Richmond Chapter of the International Society of Employee Benefits Specialists (ISCEBS) is now in its 15th year of providing educational programs and networking opportunities for members of the local benefits community.

In 2007, we ended the year with 65 members; we are still among the largest chapters in the country. I encourage all chapter members from 2007 to remember to pay your 2008 dues and I ask that if you are not a current chapter member, you look at the wonderful education and networking opportunities that membership in the national and local ISCEBS can bring to you. This year, we should all take a personal interest in the continued progress of furthering our profession through the activities of our Chapter. All efforts to expand our membership and further our educational mission are appreciated and necessary for our continued success.

Our chapter continues to remain strong financially thanks to the support of those in the benefits community. In 2007 we would like to thank Anthem, Aon Consulting, MetLife, Dominion Benefits, Delta Dental, Cigna, Mercer, Prudential, RCM&D, Southern Health, Connecticut General and Optima Healthcare who contributed \$3,600 to our education sessions. The chapter greatly appreciates all their efforts and contributions both financially and for providing speakers with such a wealth of benefits knowledge and expertise. We hosted five educational sessions in 2007 and had 185 attendees.

Over this next year, we will have a full slate of meetings scheduled that will cover a variety of topics related to employee benefits. We hope to provide our members a solid foundation for understanding the key issues that we face today in the employee benefits arena. As you are aware, there are many new issues that need to be addressed in both the health/welfare and retirement sectors of our industry. Many of the issues that we face in our industry have far reaching impacts to our overall society as well, such as health care costs and retirement security and the upcoming presidential elections. We will attempt to cover the most pertinent of these in the 5 sessions that we will hold in 2008. The first of these will be a luncheon on February 28th at the Westwood Club with Stuart Sutley of Innovative Wellness Solutions. This should be

an in depth look at wellness solutions in today's workplace. I look forward to seeing you there. In April, we are planning a breakfast session on "Educating Defined Contribution Retirement Plan Sponsors on Fiduciary Liability" with Scott Fiedler from Aon Consulting and then we will have the full day fundamentals session on Health & Welfare Benefits on June 12th and a half day session on Retirement plans on September 10th and two more topics that will be held at a luncheon on October 9th and at the annual meeting on November 13th. Some of these sessions will be available for CE credits; please stay tuned for further details. We will also be holding our annual "End of Summer" social on September 25th from 5:00 to 7:30 at the Westwood Club where we will recognize recent graduates, Fellows, and 10-year chapter members. Please mark your calendars now and I hope to see everyone at these sessions. Feel free to invite co-workers, clients and other members of the benefits profession to share in these opportunities for professional education.

I have had a wonderful time meeting and working with chapter members and the board over the past several years as part of the Board. I am truly excited about working with this year's Board. I want to express gratitude for the work that Mike Huennekens has put forth for our chapter over the past year. I would also like to thank Cathy Kercheval for her outstanding years of service to the Board as the Membership Committee chairman. Please join me in welcoming our newest Board members. Rick Owens, CEBS will be joining the board as a member-at-large. Rick is a Client Manager with SunTrust, Inc. and has had his CEBS since 2005. Julie Nowak, CEBS will be joining us as the Membership Committee chairman. Julie is a Benefit Account Analyst at Scott Benefit Services and she earned her CEBS designation in 2006. Please welcome both of these members to their positions. I feel honored to serve with such an intelligent and diverse group and look forward to the challenges and opportunities of the upcoming year.

Please Join Us for the February 28, 2008 Educational Event!

Presentation: Wellness That Works

Speaker: Stuart Sutley, MBA
Principal, Innovative Wellness Solutions

Date and Time: Thursday, February 28, 2008
11:45 to 1:15 p.m.
Luncheon Meeting

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

Cost: \$25 (\$15 for members of the Richmond Chapter of ISCEBS)

Please RSVP: By February 25, 2008 to Craig Rupert (crupert@rcmd.com or 804-237-5910) or Claire Holbrook (claire.holbrook@wachovia.com or (804) 267-3190).

Questions: Contact Craig Rupert, CEBS, at 804-237-5910, or e-mail crupert@rcmd.com.

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

Or you may pay at the door, if you have RSVP'd

Note: Meeting fees are non-refundable unless cancellation is received before February 25, 2008. **Unpaid no-shows will be billed.**

Mark Your Calendar For The Following Upcoming Chapter Events in 2008!

April 24, 2008

Breakfast Meeting 7:45 to 9:30 a.m.
Westwood Club

Scott Fiedler, Aon
Educating Defined Contribution Retirement Plan Sponsors on Fiduciary Liability

June 12, 2008

Full-Day Health and Welfare Session 7:30 a.m. to 3:00 p.m.
Westwood Club

Topics and speakers to be determined *
Breakfast and lunch served

September 10, 2008

Retirement Half Day Session 7:30 to 11:45 (Breakfast)
Westwood Club

Speakers and topics to be determined *

September 25, 2008

End of Summer Social 5:00 to 7:30 p.m.
Westwood Club

October 9, 2008

Luncheon Meeting 11:45 a.m. to 1:15 p.m.
Westwood Club

Topic and speaker to be determined

November 13, 2008

Annual Meeting (Breakfast) 7:30 to 9:30 a.m.
Westwood Club

Topic and speaker to be determined

***CE credits**

Have you visited the ISCEBS web site (www.iscebs.org) lately?
You will be interested to know you have access to a wealth of information about:

- ISCEBS
- Local Chapter
- Job/Resume services
- Survey findings
- News Briefs and Benefits Quarterly
- Live Telewebs and recorded options
- ISCEBS news and Resources
- Library/information center

If you have not been to the site lately, we encourage you to do so. To access the members-only site, enter your member number under the username and enter your last name (all lower case) as your password.

Membership Chairman's Message

I am excited about serving as the Membership Committee Chair for the Richmond Chapter this year, and look forward to getting to know all of you better. I have attended many of the chapter programs over the last few years, but just received my CEBS designation and joined the chapter in 2007.

Being a member of the local chapter entitles you to many great opportunities. There are reduced rates for educational programs and some programs meet the state requirement for credits towards Continuing Education (CE) credits for insurance agents, consultants, accountants, attorneys and other professionals. You also have the opportunity to network with other benefit professionals in the area to share your experience and to learn from others.

In 2007 the Richmond Chapter had a total of 62 paid members, 55 with their CEBS designation, and 7 working toward it. We had 5 new members join the Richmond Chapter in 2007. New members are Deborah Foster with Wachovia, Kaylyn Kinder with Scott Benefit Services, Julie Nowak with Scott Benefit Services, Nyya Sistrum with VCU Health Systems, and Rose Mary Smith with VRS.

Welcome to all new members! In 2008, let's all continue to build our chapter by inviting colleagues to the programs we hold throughout the year. Please let me know if you know of anyone who has interest in joining our chapter, or who may just have interest in attending our meetings or learning more about it.

Julie Nowak, CEBS
Membership Chair
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