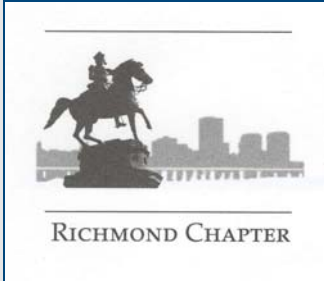




# INTERNATIONAL SOCIETY OF CERTIFIED EMPLOYEE BENEFIT SPECIALISTS

January, 2010

ISCEBS RICHMOND CHAPTER NEWSLETTER



## President's Message

I want to wish each of our chapter members, as well as all others who receive our newsletter, a very happy and successful new year on behalf of the Board of the Richmond ISCEBS chapter! We are finalizing our meeting calendar for the coming year and are excited about providing you with new and pertinent educational sessions throughout the year. The Board for 2010 is a strong, diverse and dedicated group, with whom I am proud to be associated.

## BOARD MEMBERS

### PRESIDENT

Craig Rupert, CEBS  
(804) 237-5910

### VICE PRESIDENT

Claire Holbrook, CEBS  
(804) 267-3190

### SECRETARY & PUBLICITY CHAIR

Dave Werner, CEBS  
(804) 527-1393

### TREASURER

Denise Zapf, CEBS  
(804) 775-7333

### EDUCATION CHAIR

Rick Owens, CEBS  
(804) 782-7553

### SPONSORSHIP CHAIR

Amy Burgoyne, CEBS  
(804) 330-8354

### MEMBERSHIP CHAIR

Dave Talbert  
(804) 200-6755

### PAST PRESIDENT

Gary Powers, CEBS  
(804) 320-8438

Assuming the role of President this year is quite a daunting thing, following what was accomplished during Gary Powers' term as President. I think it is safe to say that the chapter's finances are as solid as they have ever been, and our financial assets actually grew last year, despite the downturn in the economy. Our membership base also grew last year, which speaks highly of our members' commitment to the chapter as well as employer support. This fact can't be stated strongly enough – not only did we not lose members in a down economy, but we actually grew by 5 members to a total of 70. Another significant accomplishment spearheaded by Gary was the establishment of a chapter web site in June. If you have not visited the site lately, I encourage you to do so at <http://iscebs-richmond.org>. We try to keep fresh content on the site, including our program schedule, our newsletters, and photos of members and events.

A significant aspect of the chapter's financial strength comes from the contributions we receive from sponsors of our educational sessions. Last year our chapter received \$2,950 from twelve sponsors, which included Aetna, Anthem, Aon Consulting, Delta Dental, Keiter, Slabaugh, Penny & Holme, Mercer, Optima Health, Prudential, RCM&D, Southern Health, SunTrust and United Healthcare. I want to especially thank each of these sponsors once again for their generous support of our efforts.

Each year, we have a membership challenge from ISCEBS with a membership goal based on existing chapter membership numbers. As the chapter grows, so does our goal. So, it gets more challenging to reach each year, and this year will prove especially so. As such, I want to encourage each of you to not only renew your own memberships, but also think about others you might recruit. Students are especially welcomed to join. And if you have colleagues who work in the industry but have not pursued the designation, please consider encouraging them to start. I especially want to encourage corporate officers and HR people in the industry to make the CEBS curriculum part of your employee educational offerings and goals.

I would like to thank each of our veteran Board members for their dedicated service to the chapter. Serving on the Board is not without a commitment of time and effort, and each of them is due our appreciation. I would especially like to express on behalf of the Board our gratitude to our retiring Board members, Sharon Jahn and Cathy Rusch.

*Continued on page 2*

*President's Message, Continued from page 1*

And I want to welcome Denise Zapf from McGuireWoods as a newcomer to this year's Board.

We are very interested in your feedback on the value and content of what we provide you, and will be sending out a survey very shortly to ask your input on several topics. We ask that you take a few moments to complete it so as to get good representation from the membership.

If 2010 promises us anything in our industry, it is uncertainty and coming change. The employment picture remains weak, the government's actions and role in healthcare reform/taxes/retirement plans are slowly emerging, and the economic picture is one of caution and apprehension. As always, we will strive to deliver educational sessions relevant to the current environment, and pertinent to our health/welfare and retirement programs. Our first educational session of the year on February 11 will focus on health care reform and its impact on employers and individuals. I hope you will be able to join us for what will surely be an informative session. Our calendar of events for the remainder of the year is also shaping up and will be posted soon on the site. Our session dates are already posted on the site, and I encourage you to mark your calendars. Many of you will be looking for CE credits in this 2nd year of the biennium, and our June 10 and September 9 sessions will help you with those. Avoid the December scramble!

I am pleased to present this year's Board and Committee Members, which consist of the following:

President  
Craig Rupert, CEBS

Vice-President  
Claire Holbrook, CEBS

Secretary/Publicity Chair  
Dave Werner, CEBS

Treasurer  
Denise Zapf, CEBS

Board Member at Large-Membership Chair  
Dave Talbert

Board Member at Large-Sponsorship Chair  
Amy Burgoyne, CEBS

Board Member at Large-Education Chair  
Richard Owens, CEBS

Past President  
Gary Powers, CEBS

I am honored and excited to serve as this year's President, and I look forward to seeing all of you at our sessions this year. Thank you for your continued support of the Richmond Chapter.

Regards,



Craig Rupert, CEBS  
President, Richmond Chapter ISCEBS

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## Please Join Us for the February Educational Event

- Presentation:** *HealthCare Reform—What To Expect*
- Speaker:** Mac McCarthy, FSA, MAAA- President, McCarthy Actuarial  
Rob Cipolla, Esq- Partner, McGuireWoods
- Date & Time:** Thursday, February 11, 2010  
11:30 a.m. – 1:00 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)
- Questions/RSVP:** Please RSVP by February 8th to:  
Rick Owens  
[Rick.Owens@suntrust.com](mailto:Rick.Owens@suntrust.com)  
804-782-7553
- Guest fees-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 8th. Unpaid no-shows will be billed.

## Membership Report

### 2010 Membership Drive!

Our annual membership drive runs through March 2010. We are proud to report that for 2009 we had 70 local chapter members! Therefore our goal for 2010 is for renewal of the current membership and growth of at least 8 new members! If you know of anyone who may be interested in joining or learning more about the ISCEBS program, please let me know.

**New Member Eligibility:** Individuals can join the Richmond Chapter, and now the Society, with the successful completion of at least one CEBS course! Active students are eligible for chapter membership only with the purchase of course material and registration of a course exam.

**Designees:** If you have not submitted your 2010 membership dues please do so! Membership dues are the main source of income for the Richmond Chapter. Your continued membership supports the many activities and educational events throughout the year.

### Ways to renew your membership:

Online: [www.iscebs.org/form](http://www.iscebs.org/form)

Fax: 262-786-8650

Mail: ISCEBS, P.O. Box 209

Brookfield, WI 53008-0209.

Thanks for your continued support of ISCEBS and the local Richmond Chapter!

David Talbert

Membership Chair

[dtalbert@ksphllc.com](mailto:dtalbert@ksphllc.com) | 804-200-6755

## Mark These Dates on Your Calendar for Educational Events!

### April 15<sup>th</sup>

Breakfast Session – Scott Fielder from AON Consulting will discuss “Retirement – Impact of Market on Retirement Plans”

### June 10<sup>th</sup>

Full Day Health & Welfare Session – CE Credits!

### September 9<sup>th</sup>

Half Day Retirement Session – CE Credits!

### October 14<sup>th</sup>

The topic and time are pending – it will be a health & welfare session.

### November 11<sup>th</sup>

Breakfast Session and Annual Meeting with Special Guest Speaker!

All events held at the Westwood Club. Additional details are forthcoming. We look forward to seeing you at the events.