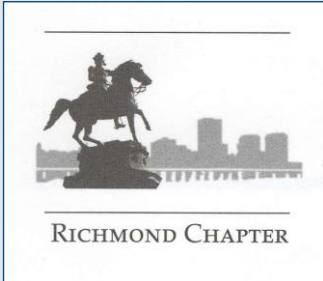




# INTERNATIONAL SOCIETY OF CERTIFIED EMPLOYEE BENEFIT SPECIALISTS

June, 2010

ISCEBS RICHMOND CHAPTER NEWSLETTER



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## President's Message

Here we are in the middle of June already, and summer is upon us. I barely remember even having a Spring! Looking at the chapter web site the other night, I realized the last newsletter posting was in March and we were overdue for another one.

Our full day continuing education session was held on June 10, and I am happy to say it was a great success. Claire Holbrook did an excellent job emceeding the event as well as coordinating all the speakers and their outlines. We had excellent turnout with 54 attendees, and the speakers were engaging and informative. Due to our chapter's solid finances, we were able to offer this session at a significant discount to that of years past. Kudos to Claire and the entire board for another successful event! And thanks to our multiple sponsors for helping to offset the expenses.

At our June session, we held a drawing for a complimentary registration for the Symposium for chapter members, valued at \$945. Our winner was Clyde Amburn. Congrats to Clyde! This drawing, in addition to the reduced-fee event, was part of our effort to reduce the chapter's capital surplus, a position in which we are lucky to find ourselves under current economic circumstances.

Speaking of the Symposium, I encourage all chapter members to consider attending. It will be held from October 3-6 this year in Charlotte, so it is about as close as it's ever been, and I hope we will have good chapter turnout. It's a great opportunity to meet fellow industry professionals and get some CE credits in the process. The Symposium always delivers high quality content.

Our board Treasurer, Denise Zapf, attended the chapter leadership development meeting in Brookfield last month. Denise said the discussion was spirited on various topics, and she came away with an enhanced understanding of ISCEBS, IFEBP, and the local chapter. She stated we are already doing most of the "best practice" things in most areas of our chapter.

I am proud to say we have added some new chapter members since we concluded our membership campaign, and total membership now stands at 63.

Health care reform is already starting to impact us all. Clients are looking to us for guidance and advice on how to handle many of the immediate changes such as dependent age. Something tells me things will get very interesting as we move forward and see how all the details play out. I learned at our last board meeting that nHealth had elected to close its doors as a result of the pending changes, and was sorry to see them become a casualty of the process.

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*President's Message, Continued from page 1*

Our next CE session will be our half-day one on September 9, focusing on retirement. We are presently working on getting the credits approved, but for those of you who still need credit hours before the end of the biennium, this will be one more chance to earn them. Save the date!

I promised in the last newsletter to share some of the discussion concepts from the Chapter Development Committee meeting I attended in March. We covered use of technology around LinkedIn, Twitter and Facebook, and the use of RSS feeds on our LinkedIn group. Enhancing chapter presence and capabilities on the web are also being looked at, and the Society now endorses our vendor as one of its preferred providers for local chapter sites. Enhancements to the site will be rolled out later this year, and we will announce any which impact our members. The Society is looking critically at ways to encourage industry professionals to pursue the CEBS designation, and at ways to enhance the member experience at both the national and local chapter levels. One of the more important things we did at the meeting was propose that chapter members who have not yet achieved the CEBS designation but who are on their way be allowed to hold the positions of Secretary or Treasurer, to allow them time to earn the designation before advancing to VP or President. This will be voted on at the next Executive Committee meeting.

Lastly, it hardly seems possible, but our web site has now been live for over a year as of June 1. We strive to keep the content current and accurate, so please take a look periodically.

The board welcomes any input from our members, so please feel free to communicate with any of us. Have a safe and enjoyable summer!

Regards,



Craig Rupert, CEBS  
President, Richmond Chapter ISCEBS

## Please Join Us for the September Educational Event

- Presentation:** *Half-Day Retirement Seminar*
- Topics:** Wills, Estates & Trusts  
Pending Legislation  
Current Trends  
Employee Communications
- Date & Time:** Thursday, September 9, 2010  
7:30 a.m. – 12:00 p.m.  
Includes breakfast
- Location:** Westwood Racquet Club  
6200 West Club Lane  
(804) 288-6028
- Cost:** \$30 (\$20 for members of the Richmond Chapter of ISCEBS)
- Questions/RSVP:** Please RSVP by September 7 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.

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

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

Half Day Retirement Session – CE Credits!

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

Dr. Max Anderson from Delta Dental will speak on connection between oral health and overall health.

### 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!

## Membership Report

Welcome to all new members and thank you to all who renewed their membership with the Society and/or the Local Chapter for 2010. As a result, the Richmond Chapter has met our membership goal for 2010 with a total of 63 paid members!

In efforts of stimulating additional membership, the Society has implemented a Mid-Year membership promotion. This promotion is open to everyone: CEBS grads, RPA, GBA, CMS and current students. (The \$50 unemployed/retired rate is still applicable.) Memberships will run through December 31, 2010 and cost only \$85 for Society membership and \$40 for the local Chapter.

New members can join online at

[www.iscebs.org/Forms/isapp.asp](http://www.iscebs.org/Forms/isapp.asp).

Also if a new member lists you as the person who referred them to join, your name will be entered to win one of three \$100 gift cards! Your name can be entered more than once to win the gift card.

We continue to build our chapter by your participation and encouragement of others to attend our various programs throughout the year. Please let me know of anyone who may need more information on CEBS or our Local Chapter activities.

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



## Member Spotlight: Denise Zapf

<b>Current Employer</b>	McGuireWoods LLP
<b>Background</b>	I grew up in Minnesota where I met my husband Karl and had my two children Kyle (age 27) and Dan (age 23). We moved to Houston, Texas in 1995 and to Richmond, Virginia in 2001. We live in eastern Hanover county and enjoy the trees and wide open spaces between houses, which is a big change from Houston.
<b>Favorite Richmond restaurants</b>	We enjoy having lunch at California Pizza Kitchen. For a celebration dinner, Old Original Bookbinders is a top spot.
<b>Activities/Interests</b>	I enjoy hiking with my three dogs. I also volunteer with Hickory Hill Canine Rescue to help find homes for dogs and cats in the Hanover area. We have an adoption stand every 2 <sup>nd</sup> and 4 <sup>th</sup> Saturday of the month at the PetSmart in Mechanicsville.
<b>What got you into the benefits field?</b>	My dad was a Prudential insurance agent. After high school, I was working for minimum wage at a local print shop, and my dad told me to go down and apply at Prudential. I didn't want a job there because I thought insurance would be BORING. However, after I started as a proofreader in the group contracts department, I began to understand the words I was reading, and my career took off from there. I eventually moved to the Law Department at Prudential, obtained an A.A. degree in Paralegal Studies and then a B.A. in Liberal Arts. Later, Aetna purchased the group health business from Prudential, so I became a Compliance Manager in Aetna's Law Department and earned a M.S. degree in Computer Information Systems.
<b>How has the CEBS designation helped you?</b>	My work background focused on health and welfare benefits until I came to McGuireWoods. Here I manage two retirement plans including a complicated defined benefit plan. CEBS courses have helped me to gain an understanding of retirement plan concepts while rounding out my knowledge of health and welfare benefits. Additionally, I teach Financial Peace Work Edition at McGuireWoods, so for my CEBS electives I took the Personal Financial Planning courses. These have been especially helpful both personally and professionally.