



# INTERNATIONAL SOCIETY OF CERTIFIED EMPLOYEE BENEFIT SPECIALISTS

September 2017

## ISCEBS RICHMOND CHAPTER NEWSLETTER



### BOARD MEMBERS

#### PRESIDENT

*Rebecca Felts, CEBS*  
*rfelts@varetire.org*  
(804) 771-7398

#### VICE PRESIDENT

*Sharon Jahn, CEBS, CMS*  
*Sharon.jahn@vcuhealth.org*  
(804) 827-1689

#### SECRETARY & PUBLICITY CHAIR

*Julie Harrison, CEBS*  
*Julie.Harrison.cebs@gmail.com*

#### TREASURER

*Hillary Keeton, CEBS*  
*hkeeton@bbandt.com*  
(804) 678-5067

#### SPONSORSHIP CHAIR

*Nick Ciccolo*  
*Nicholas.Ciccolo@mercercor.com*  
(804) 344-3761

#### MEMBERSHIP CHAIR

*Kim Csan, CEBS*  
*Kimberly.csan@hii-co.com*  
(757) 380-4935

#### PAST PRESIDENT

*Jean Robinson, CEBS*  
*jrobinson@imb.org*  
(804) 219-1670

### President's Message

I hope everyone enjoyed their summer and could take some time to rest, relax and recharge! Fall is back with a bang (and a lot of rain). I know Open Enrollment season is fast approaching.

The Board is coming back from our summer break with a half-day session on Thursday, September 14 focusing on the financial side of things. We will be reviewing Health Savings Accounts, Financial Wellness, Workforce Analytics and 529 plans. It will be at the Westwood Racquet Club from 8:00 a.m. to 12:00 p.m. with breakfast available at 7:30 a.m. If you haven't registered yet, there is still time.

I will be leaving for Denver the next afternoon for the ISCEBS Symposium that will run from September 17-20. I'm looking forward to the learning and networking – not to mention some sightseeing on the side. If you are not able to go this year, plan now to go to the 2018 Symposium in Boston.

We are starting to think about next year's schedule – and next year's Board. If you have a subject you would like to explore – or would like to present – please contact a Board member with your ideas. Also, if you have been coming to the educational events and find value in what we offer, consider joining the Board next year. Although you do need to have the full CEBS to be an officer, the other Board positions can be held by a CEBS student or someone with a GBA or RPA designation.

We have monthly Board meetings (bar July) that last about an hour. Our focus is coming up with topics and speakers for the different educational events we offer throughout the year. I have found the Board to be a great team – what one doesn't know, someone else will. If you're thinking about joining the Board, contact me or another Board member. We'll be glad to talk to you/talk you into it!

Our next event will be the Annual Meeting in November. We'll be electing new officers (notice a theme here), celebrating Chapter anniversaries and new designs.

Hope to see you at breakfast on Thursday, September 14 and maybe in Denver the next week.

Go Broncos!

*Rebecca*

Rebecca Felts, CEBS  
President, Richmond chapter ISCEBS



## Please Join Us for the September 2017 Educational Event

<b>Topics</b>	<p><b>Health Savings Accounts – Matt Irvine, Health Equity, Inc.</b></p> <p><b>Financial Wellness – Amy Reynolds, Mercer</b></p> <p><b>529 Plans – Becky Nelson, Virginia 529</b></p> <p><b>Workforce Analytics – Matt Stevenson, Mercer</b></p> <p><i>Application for CE Credits is pending</i></p>
<b>Date and Time</b>	<p><b>Thursday, September 14, 2017, from 7:30 am to 12:00 pm</b></p> <p><b>Breakfast provided</b></p>
<b>Location</b>	<p><b>Westwood Racquet Club</b></p> <p><b>6200 West Club Lane</b></p> <p><b>(804) 288-6028</b></p>
<b>Cost</b>	<p><b>\$35 (\$25 for members of the Richmond Chapter of ISCEBS)</b></p> <p><a href="#"><u>Register and pay online here</u></a></p> <p>OR</p> <p>Make checks payable and mail to:        Richmond Chapter-ISCEBS        P.O. Box 6513        Richmond, VA 23230</p> <p><i>You may pay at the door if you have responded to Hillary Keeton at <a href="mailto:hkeeton@bbandt.com"><u>hkeeton@bbandt.com</u></a> by Tuesday, September 12.</i></p>

**Member Spotlight**

Jim Gregware

**Current Employer:**

Mercer Health and Benefits LLC

**Background:**

Both my wife and I were born and raised in the suburbs of Milwaukee. Yes, I am a cheese-head, go Pack! We met and were business majors at the University of Wisconsin-Whitewater. We got married after college and raised two sons and now have three grandsons. We moved to Virginia in 1999 to have access to better weather, Richmond is an excellent fit for us.

I have been a Health and Benefits Consultant with Mercer since 2013. I started my career as a pension/401(k) administrator, moved into health benefits, then into the insurance industry.

My first insurance assignment was setting up leased PPO network arrangements in major cities around the country for Wausau Insurance Companies, (owned by Nationwide, then Liberty Mutual). From there, Liberty Mutual recruited me into their Property & Casualty National Accounts unit. I continued to work in National Accounts for Anthem and Aetna in medical account management and sales. Prior to my current role, I worked at CarMax as their Senior Health Plan Analyst. I have been fortunate to see and experience the benefits industry from many different angles.

I obtained my CEBS designation when I worked at Wausau Insurance Companies in 1994. I had a young family at the time and studied early mornings before work and managed to obtain the designation in less than three years.

**Favorite Richmond restaurants:**

Frank's West for pizza, TD's Smokehouse for BBQ, Edo's Squid for excellent Italian, and Portico Restaurant for good food, service and atmosphere. I am always up for Mexican; my favorite Mexican restaurant is Original Mexican Restaurant on Horsepen Road.

**Activities,  
Interests:**

I enjoy listening to music (jazz, rock, R&B and classical) and reading. My fitness program consists of swimming and weight training and I am giving serious thought to taking up hiking and biking. At home, if you don't find me reading, I am probably working in the kitchen. I am a good cook and an excellent baker. I also enjoy detailing my cars and yardwork (when it is not 90+ degrees outside).

**What got you into  
the benefits field?**

I graduated with a BBA in Finance and started my career in the pension/investment field and expanded to benefits. As we know, benefits can get rather complicated and I really enjoy helping people and companies identify and pursue benefit solutions. I became familiar with the CEBS through the International Foundation of Employee Benefits which is located in the greater Milwaukee area.

**How has the  
CEBS  
designation  
helped you?**

The CEBS designation has opened many doors for me and most of my employers have strongly encouraged having the designation. The coursework to obtain the designation provided good exposure to many areas of benefits. It was most helpful as a young professional to have the credibility that the designation imparts. Being part of the CEBS society has helped me to stay current in the benefits field and provided great contacts within the industry.