

Insurance Un-Masked

PIA of Indiana's Annual Convention

May 5th - 7th, 2021



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Trust in Tomorrow.



Welcome to the Professional Insurance Agents of Indiana's 2021 Annual Convention. We are very glad that you were able to join us virtually for this year's event! We are excited for three days of great CE and we think that everyone is going to learn a lot and gain valuable tips that they can take back to their office.

This year's theme is "Insurance Un-Masked". We know everyone is tired of talking about masks and COVID. But this play-on-words is actually about your dedication to our industry. You are dedicated to making sure your clients are educated and protected. This is revealed in how you care for your clients, often in times of uncertainty. Through how you conduct business, your service, your true nature, and how it is un-masked.

We have a great line-up of sessions for you over the next three days:

- **Wednesday:** Jack Klemeyer is presenting 3 sessions that provide you with tips to grow as an agent, but that will also help you grow your business.
- **Thursday:** Todd Davis is presenting 2 sessions, the first being our annual E&O seminar. Todd has a wealth of knowledge and we are glad he was able to join us again this year!
- **Friday:** Lisa Worley is presenting a 3 hour Ethics Session. Lisa is an agent from Alabama who is going to share tips from her agency.

All of this would not be possible without the help of many of you. Our Members, our StarPartners, our Convention Committee, and these wonderful speakers - thanks to all of you for your support. We appreciate you all.

Thanks again for joining us. We hope you enjoy our Virtual Convention. Please let us know if there is anything we can do to help you now or in the future!

A handwritten signature in black ink that reads "Chris Venters". The script is fluid and cursive.

Chris Venters, CPIA
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(Bill@PIAIndiana.com), or call the PIA Service Center at (317) 899-9200.

9:00 a.m. ~ 10:30 a.m.

The Business Building Challenge

Presenter: Jack Klemeyer • 1.5 hours of IN CE

Sponsored by: Indiana Farmers Insurance

As a producers, you need to have strategies in place if you want to increase sales. This session will help you develop a meaningful and actionable plan to contact existing clients and prospects. You will gain the tools necessary so that during your outreach, you will be able to ensure they have the proper coverage for their individual risks.

11:00 a.m. ~ 12:30 p.m.

Turning Adversity to Advantage

Presenter: Jack Klemeyer • 1.5 hours of IN CE

Sponsored by: Burns & Wilcox

The goal of this session is to help the agency producer see, develop, and understand practical ways to turn adversity into advantage while helping others around them, their staff, their prospects, and their customers do the same. In doing this, communication with staff, prospects, and customers will be improved which in turn will improve customer service, reliability, and the ability to properly educate customers on appropriate coverages for the risks they are exposed to in life and business.

1:00 p.m. ~ 2:30 p.m.

Developing Your Team

Presenter: Jack Klemeyer • 1.5 hours of IN CE

Sponsored by: Progressive Insurance

This session will help agency owners grow their team by gaining an improved understanding of different personality types. During this session, attendees will learn how to identify different personality types based on behavioral and language markers. This will increase collaboration as a team, which will result in improved customer service and communication with clients and prospects.

9:00 a.m. - 12:00 p.m.

Basics of Errors and Omissions Loss Prevention

Presenter: Todd Davis • 3 hours of IN CE

Sponsored by: CRC Group & Grinnell Mutual

Managing consumer risk transfer in today's litigious business environment can be challenging. This session covers topics ranging from basic daily routines, tasks associated with all stages of the insurance client life cycle, and the increasingly difficult agency task of working with clients, carriers, and third parties. The course has been developed using actual case histories from years of E&O claims brought against agents and agencies. The material presented will provide specific techniques that assist agencies in adopting procedural changes to avoid mistakes that result in unnecessary and costly lawsuits. Included are actual case studies from the past 60 months and specific recommendation from experts in defending agencies against claims of improper insurance sales and servicing.

12:30 p.m. - 2:00 p.m.

Certificates of Insurance and Additional Insureds

Presenter: Todd Davis • 1.5 hours of IN CE

Sponsored by: Arlington/Roe & Western Reserve Group

This session is designed for a wide range of insurance personnel, including agency staff and company employees. Topics covered in this session include: the use and administration of Certificates of Insurance as evidence of risk transfer; discussion of how Additional Insureds integrate into policies; and professional obligations and responsibilities of insurance agencies.

9:00 a.m. - 12:00 p.m.

Ethics in the Trenches

Presenter: Lisa Worley • 3 hours of IN Ethics CE

Sponsored by: Liberty Mutual/Safeco & Roush Insurance Services

The goal of this session is to strengthen the ethical foundation of insurance professionals. As professionals, we have an ethical duty to our customers, carriers, and the industry. This course will discuss the dilemma of professionalism, case studies, and how to improve ethics in the workplace.



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Presenters:



Jack Klemeyer

Jack Klemeyer is a Brownsburg Indiana resident, devoted husband, father and grandfather, and a man who knows that in order to get everything you want in life, you've got to approach it intelligently, and with the right strategies. He has personally designed and presented hundreds of interactive and success focused programs to aid participants in enhancing their performance, and he has personally coached hundreds of individuals to reach their potential and their goals. Jack is a certified Executive Director and John Maxwell coach, trainer and speaker.



Todd Davis

Todd is the owner and operator of the Davis Agency Insurance in Peoria, Illinois. Todd was licensed and started his insurance career at age 15 by working for the family agency in the office. The agency was started in 1924 by Todd's grandfather. In 1985, Todd became a partner and then purchased the agency in 1992. Mr. Davis earned the Certified Insurance Counselor (CIC) designation in 1995. He is presently working toward the Charter Property Casualty Underwriter (CPCU) designation, and previously completed the curriculum for Life Underwriters Training Council (LUTC).



Lisa Worley

Lisa Worley is CEO of Anchor Pardue Insurance, Inc., in Birmingham, Alabama. She received the CIC designation in 1988 and the ARM designation in 1991. Lisa has served on the Alabama Independent Insurance Agents, Inc. Education, CIC, Small and Rural Agents, and Long Range Planning Committees. Lisa is a past President for the Birmingham Executive Board. She was named "Chairperson of the year" in 2003 and "Insurer of the Year" in 2004. Her favorite title these days is "Lulu" to five grands. In her spare time, she enjoys reading, teaching, and traveling.

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Chris Crawford

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Young Insurance Professional Of The Year



**Andrew Skaggs,
Skaggs Insurance Agencies**

This year's winner was nominated by two fellow agents. They both spoke to why Andrew Skaggs of Skaggs Insurance Agency (Indianapolis) is a perfect example of what this award stands for.

Andrew started his professional career as a Special Education Teacher for four years. He joined the family agency in 2013. Each year he has taken on more responsibilities as his roll in the agency has grown.

One of the individuals who nominated Andrew said "Andrew is not only a remarkable insurance agent but also a remarkable human being. He always does what's best for the client and the insurance company."

In addition to Andrew being an active Member on our YPIA and Industry Relations Committees, he is also involved with the Insurance Agencies Owners Alliance group as well as a supporter of the Special Olympics, currently serving on the Hamilton County Board of Directors.



Company Person Of The Year



**Neil Osburn,
Madison Mutual Insurance Company**

This award honors a company person who has excelled as an insurance professional and has demonstrated the highest ethical and service standards. This individual demonstrates his/her dedication to the American Agency System and supports the insurance industry.

Neil Osburn of Madison Mutual Insurance Company is a perfect example of what this award stands for. Neil started with Madison Mutual in 2016 by opening their Indiana territory. He quickly had over 100 agents in their Indiana territory.

“Neil is very responsive to the agency force and does his best to get us what we need,” says Sue Traxler of Traxler & Parker Insurance Agencies. “Neil has demonstrated his commitment to the Independent Agency force by being instrumental in joining and supporting the PIA. I feel very strongly that Neil is a perfect recipient for this award.”



2020-2021 Award Winners:

Company Award Of Excellence



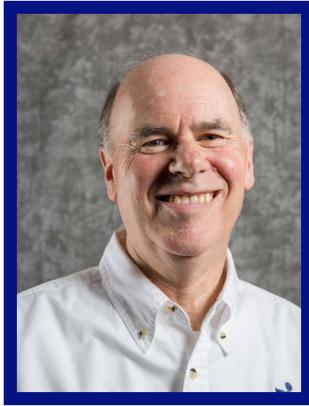
This award honors a PIA Member Company, MGA, or Broker for their dedicated support of the American Independent Agency System. Our 2020-2021 recipient of this award is Indiana Farmers Insurance.

For more than 140 years, Indiana Farmers Insurance has partnered with independent insurance agents. They view their agents as business partners, not customers. This is shown through the commitments they make to their agents with open communication and collaboration.

Indiana Farmers Insurance is also an active supporter of PIA. They are PIA of Indiana Company Members at the highest level. Representatives from Indiana Farmers regularly attend PIA events and serve on PIA Committees, volunteering their time throughout the year.



Ralph Cleveland Professional Agent Of The Year



**David Neff, CIC,
Neff Insurance Agency**

PIA is about the local professional independent agent. One of the most legendary agents, and a founding Member of PIA, was Ralph Cleveland. This award is named after him due to his dedication to community service, professionalism, and the independent agency system.

David Neff is a perfect example of what this award represents. David started at his family's agency in 1980, an agency started by his grandfather. Located in one of the smallest and poorest counties in Indiana, David has grown the agency through his hard work and dedication to serving those around him.

David is the true "local business owner". Not only does he own Neff Insurance Agency, but he also owns several other small businesses in the area including a real estate company, the local newspaper, and a Bureau of Motor Vehicles franchise (the only one in the state).

"David is an excellent example of a 'Main Street' insurance agent and a great role model for younger agents," says T.J. Hague of La Porte Insurance Agency. "I have known David for approximately 12 years. David has been a stalwart of the Board for PIA since I have known him, and many years before that. He runs a successful agency and knows the importance of giving back to his industry. He is respected by everyone. In the last few years, he has been an exceptional Treasurer for the Board."





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July 28, 2021

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