



# Society Newsletter

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Volume 23 Issue 1

P.O. Box 271, Cincinnati, OH 45201-0271  
[www.lomasociety-ohio.org](http://www.lomasociety-ohio.org)



## Letter from the President

It is hard to believe 2013 has come and gone and we are well on our way in 2014! I would like to round out the year in the LSO by reviewing some accomplishments:

- The Society won all 5 LOMA Outstanding Society Awards (Communications and Public Relations, Community Service, Education, Membership and Special Achievement).
- The Society donated nearly \$2500 to the charities we support.
- We participated in 7 education fairs and events promoting LOMA designations and industry education.
- We added 13 new members as a result of our outreach to new designees.
- We started a LinkedIn group and are consistently growing members.
- We participated in the LOMA Annual Conference and networked with other Societies from all over North America.

We also have a few new members to our Board. Jessica Dowdy from Nationwide joined our group as our Treasurer, Shawn Huffman from Farmer's joined as a Columbus Program Chair and Chris Shenesky from Nationwide joined as a Technology chair. I would like to welcome Jessica, Shawn and Chris and thank them for volunteering to serve our Society!

I am very excited about opportunities in 2014! Keep a look out for new and exciting ideas very soon!

Thanks!

Leslie Miller, FLMI, AFSI, AIRC, ACS  
President, LOMA Society of Ohio

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## Columbus Fall Luncheon

The November 14th Fall Luncheon was held at McCormick & Schmick's restaurant at Easton in Columbus. There were seventeen members present to hear Dr. Michael Moore, Vice President Chief Medical and Underwriting Director at Nationwide, present "Underwriting: A Medical Director's Perspective." A delicious lunch was served and there was plenty of time to network both before and after the event. This was David and Josh's first event and any feedback is appreciated!



## Board Leadership Updates

We have had a number of changes to the Society's board over the last few months. Our latest is that Kristy Willison is stepping down from the Treasurer position. She has accepted a new position within Nationwide that will reduce her capacity to fill the duties of the role. Good luck in your new position Kristy!

- Chris Shenesky is our new Technology Co-Chair. He will be assisting Paul Anhofer with the upcoming website updates.
- Josh Estep, David Plunkett, and Shawn Huffman are our Columbus Program Co-Chairs.
- Jessica Dowdy has agreed to step in as the Society's Treasurer.

Here is some background information on each of our new board members. Welcome to all of you! We are looking forward to the great things you can help us accomplish.

### **COLUMBUS PROGRAM CO-CHAIR - Josh Estep, Nationwide**

Josh Estep holds the FLMI, AFSI, and ACS designations. He started with Nationwide in 2010 after graduating from Mount Vernon Nazarene University with majors in Business Administration and Sports Management. Josh's current role is a Financial Analyst on the Billing and Payments team where he is a subject matter expert on fixed life policies. He enjoys baseball, basketball, and football and is a HUGE Kentucky Wildcats basketball fan.

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### **COLUMBUS PROGRAM CO-CHAIR - Shawn Huffman, Farmers New World Life**

Shawn Huffman currently holds his FLMI and ACS designations. He has also maintained his Property & Casualty as well as his Life, Health and Annuity license. He was a life agent with bankers Life and Casualty, and then became a full service agent with Farmers. He made the move to Farmers Life in March 2008 as a Customer Service Representative and has been working as an Underwriter since 2012. In his free time he likes to golf, do DIY projects around the house and spend time with family and friends.

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### **COLUMBUS PROGRAM CO-CHAIR - David Plunkett, Nationwide**

David Plunkett holds the FLMI and ACS Designations. He has worked for Nationwide since 2010 in multiple roles in the Life New Business area. Previously he worked for JP Morgan Chase, primarily serving high net worth clients, as well as clients of the private bank. He is a graduate of Otterbein College. David enjoys travelling with his wife, Holly, playing guitar, and spending time with family and friends.

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### **TECHNOLOGY CO-CHAIR - Chris Shenesky, Nationwide**

Chris Shenesky holds his FLMI, AFSI, AIAA, ARA and ACS designations. He started with Nationwide in 2006 and has held several positions within Life Operations. In his current role, he leads a team that is responsible for Business Area Production Support. Chris lives in Grove City, Ohio with his wife, two boys, and has another on the way (Feb. 2014).

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### **TREASURER - Jessica Dowdy, Nationwide**

Jessica Dowdy currently holds her FLMI, AFSI, ACS and CLU designations. She has worked in various areas throughout Nationwide Financial, including Annuity Operations, Life Operations and Retirement Solutions. She has been with Nationwide since 1998 and has held many different positions ranging from project management to management. In her free time she likes to spend time with her husband and 3 sons, exercise and socialize with family and friends.

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## Membership Fees to change

### The LOMA Society of Ohio is restructuring fees in 2014

We learned at the annual conference that we had one of the lowest membership dues and it is our duty to ensure that our Society continues to be financially sound while maintaining our commitment to donate to community charities. It is also very important to us that we make it as easy as we can for our members to pay dues and participate in Society events.

We are now offering an all-inclusive fee that covers your membership dues and all events in 2014. For one price, you will get all the benefits of being a member including the quarterly newsletter, networking opportunities and admission to all society events.

For an annual fee of \$100 you can continue to support the LOMA Society of Ohio and we can help you find opportunities for professional growth!

The LOMA Society of Ohio (LSO) appreciates the focus most companies are giving to any increase in cost. We are pleased to offer additional options for the membership fees for 2014.

#### 2014 Membership Options:

- **\$100 All In Fee:** Includes membership and registration for all four luncheons.
- **\$35 Membership fee:** Only covers membership fee. This includes access to the LSO quarterly newsletter and the opportunity to connect with industry leaders and insurance professionals throughout the state. LSO also continues to give back to the community through its charitable work and scholarship programs. An additional **registration fee of \$40 for each luncheon** you attend would be required.

A\$50 registration fee will apply to each luncheon for non-members.

The LSO looks forward to continuing to provide value to you and the insurance industry of Ohio. If there are any questions regarding the 2014 membership fees, please do not hesitate to contact Leslie Miller, President, at [MILLEL55@nationwide.com](mailto:MILLEL55@nationwide.com) or Joanie Hagedorn, Membership Chair, at [Joanie.Hagedorn@wslife.com](mailto:Joanie.Hagedorn@wslife.com) .

**Educate. Engage. Inspire.**



## Interested in Membership? Know others interested?

The purpose of LOMA societies is to provide society members, students, insurance professional and financial services professionals with opportunities for continuing industry education, professional growth, networking opportunities, and to increase the recognition of all LOMA designations.

Key points about being a member of the LOMA Society of Ohio:

- ***Listen to some of Ohio's subject matter experts on industry topics affecting your company.*** The Society holds four business luncheons (two in Columbus and two in Cincinnati) each year.
- ***Ever wonder if another company encounters the same issues as your company?*** Connect with industry leaders and insurance and financial services professionals throughout the state of Ohio.
- ***Learn what is going on in the insurance industry in Ohio.*** Receive Society newsletters to keep you informed regarding Society events.
- ***Social Responsibility:*** The Society has been awarded LOMA's Community Service Award numerous times over the years. Our Society continues to support charities. The Society offers two educational scholarships each year, available to members or a family member, subject to the rules of the education scholarship program.
- ***Leadership Opportunities:*** The Society has been awarded LOMA's Communication and Public Relations Award multiple times, as well. Help continue this tradition and broaden your leadership skills as a board or committee member.

Did you know we have over 90 members representing the following companies?

Ameritas Life  
Columbus Life  
Farmer's New World Life  
Hartford Life

Lafayette Life  
Nationwide  
Ohio National Financial Services

Protective Life  
State Farm  
Western & Southern Life

## 2014 Charities

Our 2014 charities are:

Mid Ohio Foodbank in Columbus <http://www.midohiofoodbank.org/>

Freestore Foodbank in Cincinnati <http://www.fsfbmedia.org>

Ronald McDonald House (Cincinnati & Columbus) <http://www.rmhc.com/>

If you have questions, please reach out to Leslie Miller.



## Calendar of Upcoming Society Dates:

April 29 Cincinnati Spring Luncheon



### Upcoming LIMRA/LOMA Conferences:

#### The Life Insurance Conference

April 7-9, 2014

Chicago Marriott Downtown Magnificent Mile  
Chicago, Illinois

#### The Retirement Industry Conference

April 9-11, 2014

Chicago Marriott Downtown Magnificent Mile  
Chicago, Illinois

#### ACORD LOMA Forum 2014

May 4-6, 2014

Rosen Shingle Creek  
Orlando, Florida

#### Social Media Conference for Financial Services

August 20-22, 2014

Intercontinental Boston  
Boston, Massachusetts

See a full schedule of LIMRA/LOMA Conferences at <http://www.loma.org/Events.aspx>.

## Board Contact Information

President - Leslie Miller

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Vice President - Lined Mason

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Secretary - Nicole Frazier

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Treasurer - Jessica Dowdy

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Membership Chair - Joanie Hagedorn

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Education Chair (Cincinnati) - Jennifer Cline

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Education Chair (Columbus) - Katy Zumsteg

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Columbus Program Co-Chair - Shawn Huffman

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Columbus Program Co-Chair - David Plunkett

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Columbus Program Co-Chair - Josh Estep

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Cincinnati Program Co-Chair - Julie Haas

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Cincinnati Program Co-Chair - Angee Ellis

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Technology Co-Chair - Paul Anhofer

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Technology Co-Chair - Chris Shenisky

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Questions or comments about the newsletter? Contact the Secretary, Nicole Frazier