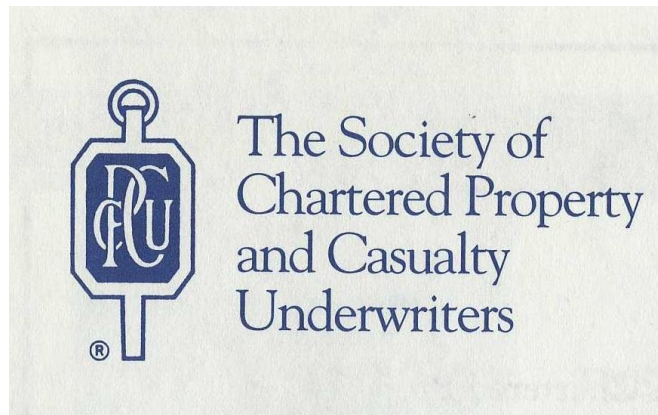


Records of the CPCU Society - New York Chapter,

1969-2003

4.1 linear feet
(9 boxes)

Processed by Eileen Kelly
October 2012



Kathryn and Shelby Cullom Davis Library
Archives and Special Collections
St. John's University

Records of the Chartered Property and Casualty Underwriters Society-New York Chapter, 1969-2003
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Historical Note

The Society of Chartered Property and Casualty Underwriters (CPCU) was founded in 1944 in the interest of promoting professional ethics through fellowship and continuing education. Members are required to pass CPCU examinations, meet experience qualifications, and uphold the Society's code of professional ethics. In 1994, the organization became known as the CPCU Society. The New York Chapter was established on March 5, 1945. The chapter co-sponsors meetings with other professional insurance organizations and sponsors educational forums and other events that advance continuing professional development. The chapter has received numerous awards for such efforts, including the esteemed President's Award from the national CPCU Society.

Scope and Content

These records document the activities of the New York Chapter of the CPCU Society. Documentation includes minutes and agendas from monthly Board of Directors and Officers meetings, correspondence, memoranda, press releases, reports, newsletters, programs and other publications generated by the New York Chapter, other chapters, and the national organization. The collection also includes photographs and awards. Some correspondence, photographs, and other matter pertains to the College of Insurance (TCI) and the Davis Library.

Subject Terms

Society of Chartered Property and Casualty Underwriters--New York Chapter. Archive.

Society of Chartered Property and Casualty Underwriters. Archive.

CPCU-Harry J. Loman Foundation

Property insurance--societies, etc.

Property insurance--New York (State)--Examinations.

Casualty insurance--New York (State)

Casualty insurance--Societies--United States--etc.

Newsletters.

Meeting minutes.

Correspondence.

Clippings.

Photographs.

Awards.

Organization

The records are arranged into fourteen series, four of which contain subseries. Three of the series, entitled Communications, Operations, and Professional Development Committees, correspond to so-named committees within the organization and the subseries within each of these series represent analogous subcommittees. Within each series, folders are arranged alphabetically then chronologically within the alphabetical arrangements.

- Series 1 – Board of Directors and Officers
 - Monthly Meetings
- Series 2 – Presidents
- Series 3- Committees (General)
- Series 4- Communications Committee
 - Careers Program
 - Chaptergram*
 - Public Relations
 - Public Relations
 - Section Liaison
 - Speaker's Bureau
- Series 5- Operations Committee
 - Arrangements
 - Community Service
 - Membership
 - Programs
 - Research
 - Social and Special Events
- Series 6- Professional Development Committee
 - Candidate Development
 - Continuing Professional Development (CPD)
 - Education
 - Insurance Education (I-E) Day
 - New Designee
 - Seminars
- Series 7- Treasurer
- Series 8- 1995 Conferment Luncheon
- Series 9- NY Chapter 50th Anniversary Party
- Series 10- Regional Director
- Series 11- Chapters
- Series 12- National CPCU Society
- Series 13- Miscellaneous
- Series 14- Photographs and Awards

Container List

Series 1 – Board of Directors and Officers

Box 1

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
1	Chapter Plan	1992-1993
2	Correspondence	1992-1993
3	“In Remembrance--September 11, 2001”	2001
4	Introduction of Officers & Directors Program	1994
5	Meeting Calendar	n.d.

Series 1 – Board of Directors and Officers Monthly Meetings

Box 1

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
6	Meeting Minutes and Agenda	September 1994
7	Meeting Minutes and Agenda	October/November 1994
8	Meeting Minutes and Agenda	November/December 1994
9	Meeting Minutes and Agenda	December 1994/ January 1995
10	Meeting Minutes and Agenda	January/February 1995
11	Meeting Minutes and Agenda	February/March 1995
12	Meeting Minutes and Agenda	March 1995
13	Meeting Minutes and Agenda	March/April 1995
14	Meeting Minutes and Agenda	May/June 1995
15	Meeting Minutes and Agenda	August 1995
16	Meeting Minutes and Agenda	September 1995
17	Meeting Minutes	October 1995
18	Meeting Minutes and Agenda	December 1995
19	Meeting Minutes	February 1996
20	Meeting Minutes and Agenda	March/April 1996
21	Meeting Minutes and Agenda	March/April 1996
22	Meeting Minutes and Agenda	April/May 1996
23	Meeting Minutes and Agenda	April/May 1996
24	Meeting Minutes	June 1996
25	Meeting Minutes [RESTRICTED]	June 1996
26	Meeting Minutes and Agenda	July 1996
27	Meeting Minutes	August/September 1996
28	Meeting Minutes and Agenda	August/September 1996
29	Meeting Minutes and Agenda	October/November 1996

Box 2

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
1	Meeting Minutes and Agenda	November/December 1996
2	Meeting Minutes and Agenda	December 1996/January 1997
3	Meeting Minutes and Agenda	January/February 1997
4	Meeting Minutes and Agenda	February/March 1997

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5	Meeting Minutes and Agenda	February/March 1997
6	Meeting Minutes	March 1997
7	Meeting Minutes and Agenda	March/April 1997
8	Meeting Minutes and Agenda	April/May 1997
9	Communications Report	May 1997

Series 2 – Presidents

Box 2

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
10	Correspondence	1994
11	Correspondence	1995
12	Correspondence regarding Chapter management	1995
13	Correspondence	1996
14	Correspondence	1996
15	Correspondence	1996
16	Correspondence	1997
17	Correspondence	1997
18	Management Information Systems (MIS) Committee Survey	1995
19	Message from the President	1997
20	President's Report	1993-1994
21	President's Report	1993-1994

Series 3- Committees (General)

Box 2

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
22	Committee Functions	c.1992
23	Meeting Schedules	c.1992
24	NY Chapter Committees	1992-1994

**Series 4- Communications Committee
 Careers Program**

Box 2

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
25	Correspondence	1993
26	Student Questionnaires [RESTRICTED]	1990-1993

**Series 4- Communications Committee
 Chaptergram**

Box 2

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
27	Big Applegram	Winter, Summer 1993
28	Assorted Issues	1994-2003

**Series 4- Communications Committee
Public Relations**

Box 2

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
29	APIW News	1994
30	Chase Communications Billing	1994-1995
31	Correspondence	1992
32	Correspondence	1993
33	<i>General Requirements in Rate Filings</i>	1990

Box 3

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
1	Jay Gleeson Memorial Award for Public Relations plaque	1983
2	Jay Gleeson Memorial Award for Public Relations	1994-1998
3	Press releases and photographs	1984-1986
4	Website	1995-1997, 2000

**Series 4- Communications Committee
Section Liaison**

Box 3

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
5	Correspondence	1992

**Series 4- Communications Committee
Speaker's Bureau**

Box 3

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
6	Updated list	1993

**Series 5- Operations Committee
Arrangements**

Box 3

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
7	Correspondence	1990-1993

**Series 5- Operations Committee
Community Service**

Box 3

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
8	Correspondence	1993
9	Good Works Award submission	1998

**Series 5- Operations Committee
Membership**

Box 3

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
10	Lists of Board Members, Officers, and Committee Assignments	1993-1994, 1996-1997
11	Lists of Prospective Designees	1995-1996
12	Mailing list	1996
13	Membership Award for Excellence Submission	1998
14	New Designees	1992-1993
15	NY Chapter Directory	1996-1997

**Series 5- Operations Committee
Programs**

Box 3

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
16	Flyers and correspondence	1992-1993
17	International Conference on the Global Insurance Market Booklets	1990-1991
18	Meeting programs	1969, 1994-2001
19	Meeting programs	1994-1998, 2000-2001

**Series 5- Operations Committee
Research**

Box 3

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
20	Research Guidelines	1991-1992
21	Research Guidelines	1998

Box 4

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
1	Creating the First International Insurance Designation	1990
2	Creating the First International Insurance Designation	1990
3	Insurance as a Career: It's Image on College Campuses	c.1984
4	Insurance as a Career: It's Image on College Campuses	c.1984
5	Insurance Fraud and the Industry Response	1995
6	A Lighthearted Guide to Being a Chapter Treasurer	1989
7	A Lighthearted Guide to Being a Chapter Treasurer	1989
8	Measuring the Success of Insurance Claim Recovery Techniques	1996
9	Measuring the Success of Insurance Claim Recovery Techniques	1996
10	Occupational Disease Compensation Revisited	1988
11	Occupational Disease Compensation Revisited	1988
12	Pollution: A Problem for Risks of All Sizes	1971
13	Workers Compensation Rating Bureaus Facing a New Millenium	1998-1999
14	Workers Compensation Rating Organizations in the 1990s	c.1991

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**Series 5- Operations Committee
Social and Special Events**

Box 4

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
15	Conferment program	1972
16	Conferment programs	1978-1982, 1984-1989
17	Conferment programs	1990-1991

Box 5

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
1	Conferment programs	1992-1993
2	Conferment	1993
3	Conferment	1994
4	Conferment	1994
5	Conferment	1994
6	Conferment	1994
7	Conferment	1994
8	Conferment	1994
9	Conferment	1994
10	Conferment	1994
11	Conferment	1994
12	Conferment	1994
13	Conferment programs	1994-1997
14	Conferment programs	1998-2000
15	Conferment programs	2001-2003
16	Correspondence	1992-1993
17	Correspondence	1993
18	Host Chapter Annual Meeting Guide and Tristate Reception	1992-1993

**Series 6- Professional Development Committee
Candidate Development**

Box 5

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
19	Correspondence	1992-1993
20	Edwin S. Overman Award submission	1995
21	Edwin S. Overman Award submission	1998

Box 6

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
1	Edwin S. Overman Award submission	1998-1999
2	Edwin S. Overman Award submission	1998-1999

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**Series 6- Professional Development Committee
Continuing Professional Development (CPD)**

Box 6

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
3	Brochures	1992-1993
4	CPD Qualifiers by Chapter Report	1997-1998

**Series 6- Professional Development Committee
Education**

Box 6

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
5	Continuing Education Law, New York State	1992-1993
6	Continuing Education Law, New York State	1992-1993
7	Continuing Education Program Selection Guide	1995-1996
8	Curriculum	1991-1993
9	E. Adrian Teaf Memorial Award submission	1993
10	E. Adrian Teaf Memorial Award submission	1995
11	E. Adrian Teaf Memorial Award submission	1998-1999
12	The College of Insurance (TCI) correspondence	1993
13	The College of Insurance (TCI) Scholarship	1991-1993
14	The College of Insurance (TCI) Scholarship	1994

**Series 6- Professional Development Committee
Insurance Education (I-E) Day**

Box 6

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
15	Brochures	1984-1987, 1989-1990, 1992
16	Brochures	1992-1993
17	Proclamation of the City of New York	1987
18	Continuing Education Law, New York State	1992-1993
19	Correspondence	1993-1995
20	Correspondence	1995
21	NY Insurance Association Presidents	c.1992-1993
22	Student rosters and Questionnaires [RESTRICTED]	1990-1992

**Series 6- Professional Development Committee
New Designee**

Box 6

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
23	Correspondence	1991-1993

**Series 6- Professional Development Committee
Seminars**

Box 6

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
24	Correspondence	1992
25	Correspondence	1995

Series 7- Treasurer

Box 6

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
26	Check Request Form	c.1992
27	Financial Guidelines	1994

Series 8- 1995 Conferment Luncheon

Box 6

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
28	Correspondence	1994-1995
29	Correspondence	1995
30	Correspondence	1995

Series 9- NY Chapter 50th Anniversary Party

Box 7

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
1	Correspondence	1995
2	Flyer	1995

Series 10- Regional Director

Box 7

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
3	Correspondence	1993
4	Director's Newsletter	1992-1993
5	NY Chapter Planning and Activity Report	1991-1993

Series 11- Chapters

Box 7

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
6	The Additional Insured Book	1991
7	Bermuda Subchapter Correspondence	1992-1993
8	Chapter Officer News	1991-1993
9	Chapter Officer News	1994-1996
10	Chapter Officer Leadership Conference (COLC)	1995
11	Chapter Officer Leadership Conference (COLC)	1995
12	Chapter Officer Leadership Conference (COLC)	1995

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13	Chapter Officer Leadership Conference (COLC)	1995
14	Chapter Officer Leadership Conference (COLC)	1995
15	Chapter Officer Leadership Conference (COLC)	1995-1995
16	Chapter Officer Leadership Conference (COLC) Manual	1995
17	Chapter Officer Leadership Conference (COLC) Report	1995
18	Chapter Officers Planning Meeting	1996
19	The Hold Harmless Agreement (4 th ed): Chapters 1-5	1987
20	The Hold Harmless Agreement (4 th ed.): Chapters 6-8 and Index	1987
21	Idea Exchange	1993
22	Sample Contract	1983
23	Tristate Chapters	1992

Series 12- National CPCU Society

Box 8

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
1	AICPU/IIA Regional Diploma Ceremonial Material	1997
2	AICPU/IIA Regional Diploma Ceremonial Material	1997
3	Annual Meeting	1996
4	Chapter Officers Guide (3 rd ed): Administrative Manual, Volume 3	1994
5	Chapter Officers Guide (4 th ed): Administrative Manual, Volume 3	1996
6	Chapter Officers Handbook	1992
7	Chapter Officers Handbook, pages 13-28	1992
8	Chapter-Section Liaison Program Kit	1994-1995
9	Continuing Education Program Selection Guide	1995-1996
10	Correspondence	1992-1993
11	CPCU-Harry J. Loman Foundation	1993
12	CPCU News Volume 20, no. 8	August 1972
13	Directory and Departmental Reference Guide	c.1994
14	Directory	2000-2001
15	Grade Analysis Report	1990
16	Idea Exchange	1993
17	New Designee Guide (2 nd ed)	1995
18	Yearbook	1983

Series 13- Miscellaneous

Box 8

<u>Folder</u>	<u>Title</u>	<u>Dates</u>
19	Miscellaneous Documents	c.2001

Series 14- Photographs and Awards

Box 9

<u>Title</u>	<u>Dates</u>
Photographs, Awards, and Ribbons	1970-1992