

# International DI Society's Inaugural Meeting





There was a sense of long-awaited unity at the inaugural meeting of the International Disability Insurance Society, held October 6–8, 2005, in Tampa, FL. Too many years have passed since a cohesive organization for disability insurance producers, marketing organizations, insurers, reinsurers and regulators have gathered for the good of the DI market.

Meeting chair Ron Cohen's diligent and meticulous efforts to build the program, along with the other members of the board of directors, Harold Petersen, Bill Barrett, Caryn Montague, Steve Crawford, Michael Eskra, Sr., Adolfo Krans and Kitty Tatar, resulted in an outstanding meeting with just the right balance of workshops, panels and networking for the 140 individuals attending.

"A Generation of Change" was the theme of the conference, and the first panel discussion covered industry changes in the last 10 years. Brian Lauber, OneAmerica, said, "It's time we quit looking through the rear view mirror and get out the binoculars." Good advice, considering that there are only a few carriers in the DI business today and producers are down 30 percent in the last decade.

The other two panel discussions included educating the DI consumer and the future of the DI industry, both of which included

a group of seasoned veterans. As for the future of the DI industry, topics discussed were distribution, products, technology and education.

Individual presentations covered reinsurance, due diligence, meeting consumer needs in all markets, using technology to educate consumers, marketing trends, specialized risks, field underwriting and state regulation.

One attendee challenged IDIS to develop newer training materials to promote product awareness and professional responsibility. In answer to that challenge, IDIS has formed an education committee—to be led by Bob Herum, OneAmerica—as well as a mentoring program for producers just entering the market—with Lawrence Geller, L.I. Geller Insurance Agencies Ltd., Campbellville, Ontario, Canada, as chairman.

DI veteran Gerald Katz predicts, "The 2006 IDIS meeting should be outstanding, with the number of producers, carriers and vendors supporting the event." He added, "If you don't attend the meeting next year in Las Vegas and you are in the disability insurance industry...shame on you!"

For more information about next year's meeting (to be held at the Hyatt, Lake Las Vegas, October 20–24, 2006) go to [www.internationaldisociety.com](http://www.internationaldisociety.com).

(All photos captioned from left to right.)

1. Master of ceremonies Ron Cohen, Ron Cohen Associates, Barker, TX, welcomes attendees to the first IDIS meeting.

2. Harold Petersen, Petersen International Underwriters, Valencia, CA, accepting the first IDIS Harold Petersen Lifetime Achievement Award from Bill Barrett, Disability Insurance Services, San Clemente, CA. Jacque Petersen proudly shares the moment.

3. The welcoming committee: Caryn Montague, Montague Associates, Miami, FL; Bill Barrett, Kitty Tatar, Guardian-Berkshire Life Insurance Companies of America; and Thomas Petersen, Petersen International Underwriters.

4. Gerry Katz, Disability Income Concepts, Inc., Weston, FL, with Mike Eskra, Sr., Eskra and Associates, Inc., Coral Gables, FL.

5. Eugene Cohen, Eugene Cohen Agency, Skokie, IL, with Barbara Mueller, Risk Management International, Inc., Marine City, MI.

6. Half of the "Industry Changes in the Last 10 Years" panel: Candy Bidler, The Principal; Ken Smith, Assurity; and Brian Lauber, OneAmerica.

7. Two generations of DI experts: Thomas, Harold and Jacque Petersen.

8. Tony Romano, UnumProvident Corporation, talking to the group about "High Income DI and Options."

9. Brokers who together have more than three-quarters of a century of DI experience: Ian Callaway, disability insurance analyst, Vancouver, BC, and Charles Nord, broker, Bradenton, FL.

10. Willoughby Lewis and Joyce Gregory, VI Employee Benefit Consultants, Inc.; Charlotte Amalie, Virgin Islands.

11. Reed Schnitter, Financial Group, Plano, TX, with Skip Rice, DI Advisor, Fort Worth, TX.

12. Keith Ouellette, Risk Insurance and Reinsurance Solutions, Deerfield Beach, FL, talking with Tad Varney, Disability Insurance Specialists, LLC, Bloomfield, CT.

13. Gerry Katz being scolded by Jacque Petersen.

14. Steve Kershaw, Illinois Mutual, and Andy Kasow, Professional Agent's Resource, Miami, FL. 🌐