

The Rough Notes Company COMMUNITY SERVICE AWARD OPPORTUNITY

Applications being accepted for independent agents, brokers, and their firms

By Robert N. Kretzmer, CIC

More than two dozen years ago, I sat down with Walt Gdowski, owner of The Rough Notes Company, at the firm's headquarters to discuss what I perceived as a problem in the insurance industry: Many insurance agents, brokers, and other insurance professionals were getting a "bad rap" from the news media and other outlets. Too much press about our industry was negative.

In our conversation, I contrasted that with what I knew from my experience: Insurance professionals—especially independent insurance agents and brokers—not only helped preserve and protect the assets of their clients but also engage in philanthropic acts within their local communities. We could build up the industry and its image by recognizing these positive activities.

Walt asked why I didn't go to insurance companies or other groups to "pitch" my idea for a national award for community service by insurance agents and/or brokers. The answer was really quite simple: I wanted a neutral partner that would not influence the selection of winners. Walt agreed with the idea, and for 25 years we've been recognizing amazing insurance agents, brokers, and other insurance professionals for their extraordinary and positive contributions.

The founding philanthropic principles of independent agents and brokers that we discussed at our original meeting are as relevant today as when we started:

- **Appreciation.** The community service efforts by insurance professionals are greatly appreciated by their local communities.
- **Gratitude.** The local communities and the people who are the beneficiaries of the community service projects are incredibly grateful.

- **Impact.** The community service projects are significantly making a positive change in the local community.
- **Commitment.** Agents and brokers have an unwavering commitment to "give back" to their communities where they had done well.
- **Generosity.** Local agents and brokers have a profound sense of "giving back" to their communities.
- **Dedication.** Agents and brokers by way of their profound community service projects have inspired others to do the same.
- **Support.** Community service projects deliver a huge benefit to local communities because many communities do not have enough resources to support some of the services needed locally.
- **Selflessness.** Agent and broker selflessness is a "beacon" to others to help within their local communities.
- **Inspiration.** Agent and broker acts of kindness and philanthropy have inspired the community and recipients of these worthwhile projects.
- **Contribution.** Through agent and broker philanthropic projects, local communities have become strengthened.

We want to be sure that the extraordinary efforts of local insurance agents, brokers, and insurance agencies don't go unnoticed, because their positive impacts have been and are immeasurable. Agent and broker dedication, time, energy, and money are making their local communities much stronger.

Our past honorees represent the kind of socially concerned, responsible professionals in whom our industry



can take great pride. Without a doubt, those we have honored are only a small percentage of the many insurance professionals who are equally worthy of formal recognition. We again ask that you please nominate a deserving insurance professional this year for our prestigious award.

So again, this year, we want to identify, recognize, and honor a local insurance agent, broker, and/

or agency for their extraordinary community service project. These projects could take any of a number of different forms, such as fundraising activities, providing food for the hungry, disaster relief, building houses, and supporting nonprofit organizations, to name a few.

Nominees will be judged on their overall contribution to their community through their projects and the impact that their efforts have made on local residents and their respective communities.

The winning agent, broker, or agency will be honored at a special dinner in the spring of 2026 in conjunction with the *Rough Notes* Agency of the Year celebration in Indianapolis. The winning philanthropic organization or charity will receive a \$5,000 check in the name of the winning agent, broker, or agency. Additionally, the winner will be presented an engraved eagle sculpture and will be featured in an article in a future issue of *Rough Notes* magazine about the winning community service project.

We encourage you to complete the nomination form and return it to The Rough Notes Company on or before December 31, 2025. Past winners and their causes include:

2024—Snellings Walters Agency, Atlanta, Georgia: “Insure the Cure,” an industry initiative in support of the Cystic Fibrosis Foundation’s mission.

2023—Maggie Bender-Johnson, Roseville, California: Maggie and her agency for 20-plus years have supported the Leukemia & Lymphoma Society’s Central Valley Region.

2022—Susan Shaw, Hurst, Texas: Susan and her family created and operate Goals for Bowls Foundation, bringing food, soccer balls and water systems to villages overseas.

2021—Higginbotham, Fort Worth, Texas: For their work with Higginbotham Community Fund and other initiatives.

2020—Bill Mitchell, Waterville, Maine: For his work with Boys & Girls Clubs and YMCA of Greater Waterville, and other initiatives.

2019—Accel Group, LLC, Cedar Rapids, Iowa: Created and ran a garden that yielded nearly five tons of tomatoes, squash, celery and kale for Iowa families.

2018—SouthGroup Insurance Services, Ridgeland, Mississippi: Its annual 5K benefits the Friends

of Children’s Hospital and the Blair E. Batson Hospital for Children in Jackson.

2017—Wayne Coffey, Hunt Valley, Maryland: Founded No More Stolen Childhoods, an organization that raises awareness of childhood sexual abuse.

2016—Charlebois Trépanier Insurance and Risk Management, Gatineau, Quebec, Canada: Organizes multiple fundraising events for the Multiple Sclerosis Society of Canada.

2015—The Henriott Group, Lafayette, Indiana: Partners to improve students’ reading skills and increase involvement in education by parents, businesses, and organizations.

2014—TG Nulty, Otsego, Michigan: Provides funding for Urban Youth for Africa, which helps economically disadvantaged teens finish high school and become community leaders.



Maggie Bender-Johnson addresses the attendees after receiving the 2023 Community Service Award.

2013—James Colangelo and Richard Morello, Florham Park, New Jersey: Founded and operate Family Reach Foundation, which provides funding for expenses for families dealing with pediatric cancer.

2012—Disabled Veterans Insurance Careers, Fort Myers, Florida: James Pender and Gary Trippe established a foundation that helps disabled veterans find career paths in insurance.

2011—Chris Paradiso, Stafford Springs, Connecticut: Provides funding for the Connecticut Children’s Medical Center in Hartford, Connecticut.

2010—Craig Moon, Middletown, Ohio: Created, developed, and funds an adult autism community living facility in Ohio.

2009—Barbara Galgiani, Modesto, California: Helped create and raises funding for a hospice organization in California.

2008—D. Gaines Lanier, West Point, Georgia: Reconstructs housing in poverty-stricken areas of Georgia and Alabama.

2007—Co-Winner Mark Williamson, Little Rock, Arkansas: Provides funding for a radiation therapy institute in Arkansas.

2007—Co-Winner Markham Rollins III, Rye Brook, New York: Raises funds to build houses and constructs housing for needy families in Nicaragua.

2006—J. Douglas Reichart, West Des Moines, Iowa: Chaired a local Iowa United Way campaign to an all-time record donation year.

2005—Jim McGovern, Belmont, California: Created and is the program organizer for a local branch of the California Leukemia & Lymphoma Society.

2004—Harry Swimmer, Charlotte, North Carolina: Founded and operates a therapeutic horseback riding clinic for ill children and adults.

2003—Jack and Jason Rua, Fall River, Massachusetts: Chaired a fundraising campaign and a key committee for a highly successful United Way campaign.

2002—Kenneth Felton, Vero Beach, Florida: Developed a local Boys & Girls Club in Indian River, Florida.

2001—Dick Lees, Pana, Illinois: Promoted funding for the addition of a new emergency room at a local hospital.

2000—Al Singer, Teaneck, New Jersey: Founded the People Against Children Starving program, which feeds children in New Jersey and around the country. ■

The author

Robert N. Kretzmer, CIC, is executive director of The Rough Notes Company Community Service Award program.

The Rough Notes Company

Community Service Award

Award Conditions and Prerequisites:

Purpose: To recognize and present an award to an independent insurance broker, agent or agency that has demonstrated extraordinary community service within his, her or their local, regional or national community. To present the winning philanthropic organization designated by the agency with a check in the amount of \$5,000 to help further its special cause(s).

Criteria: Nominees will be judged on their overall contribution (funds raised, people helped, volunteerism, etc.) to their community service project and/or initiative, and positive impact (both short-term and long-term) that their efforts have made in their community.

Nomination period: Nominations will be accepted at the offices of *Rough Notes* magazine by U.S. mail, overnight delivery or hand delivery up to and including December 31, 2025. No nomination forms will be accepted after December 31. Please note that no facsimiles or emails will be accepted.

Conditions:

1. Nominators must complete the nomination form in its entirety and provide all supporting documentation.

2. All nomination forms and supporting documentation must be received no later than December 31, 2025.

3. All nomination forms **MUST** include a supporting letter from the philanthropic organization verifying AND documenting the insurance broker, agent, or agency involvement.

4. No facsimiles or emails will be accepted.

5. All nomination forms and supporting documentation become the exclusive property of The Rough Notes Company. Further, the nomination form and supporting documentation may be used at the sole discretion of *Rough Notes*



Sam Berman (left) presenting The 2024 Rough Notes Community Service Award to Clay Snellings, CPCU, principal and chairman of the board of Snellings Walters, and Vicki Nix, associate director, Georgia chapter, Cystic Fibrosis Foundation.

magazine to publicize the award and award recipient, and to promote the Community Service Award program.

6. Incomplete nomination forms or nomination forms without supporting documents will not be considered.

7. Nominators may nominate themselves or their agency.

Selection: Designated individuals from The Rough Notes Company and selected others will review all nomination forms and supporting documentation and select a winner. The winner will be honored at *Rough Notes* magazine's Agency of the Year awards dinner in Indianapolis.

Awards:

1. The philanthropic organization

will receive a check for \$5,000 to be used to further its endeavors.

2. The winning broker, agent or agency will be presented with a sculptured engraved eagle.

3. *Rough Notes* magazine will publish an article to publicize the community service project and award winner.

The awards dinner will be held in Indianapolis, Indiana, in the spring of 2026.

Mailing: Send all nomination forms and supporting documents to:
The Rough Notes Company, Inc.
Attn: Community Service Award
11690 Technology Drive
Carmel, Indiana 46032-5600

The Rough Notes Company

Community Service Award

Nomination Form

Deadline: December 31, 2025

Date: ____/____/____

I. Nominee Information (Required)

Nominee: ☐ Broker ☐ Agent ☐ Agency (please indicate one only)

Nominee Name: _____
(last) (first) (middle initial) (designations - i.e., CIC, CPCU, etc.)

Nominee Cell Phone: _____

Agency Name: _____

Agency Address: _____

(Street or P.O. Box)

(City) (State) (Zip)

Telephone: () _____ Fax: () _____ Email: _____

II. Community Service (Charity) Information (If a single charity is designated by the agency)

Charity Name: _____

Charity Address: _____
(Street or P.O. Box)

(City) (State) (Zip)

Charity Telephone: () _____ Fax: () _____ Email: _____

Charity Contact Person: _____ Cell Phone: _____
(Name & Title)

III. Community Service Information (Required)

Please explain why your nominee should be considered for the Community Service Award by providing the following information and documents:

1. Describe **in detail** your nominee's local, regional or national community service project or initiative, *including* the short-term **and** long-term impact on the specific community.
2. Attach pertinent documents to support your nominee. This may include, but is not limited to, newspaper articles, citations, brochures, videos, DVDs, CDs, press releases, testimonials or other information germane to this award.
3. Attach your nominee's resume or biographical information.
4. Attach any other pertinent information or documents that will aid in the consideration of your nominee.
5. Incomplete nomination forms will **not** be considered.

IV. Nominator Information (Required)

Name of Nominator: _____

Agency or Company Name: _____

Address: _____
(Street or P.O. Box)

(City) (State) (Zip)

Telephone: () _____ Fax: () _____ Email: _____

V. Filing Information

1. All nomination forms and supporting documentation must be received at The Rough Notes Company offices by December 31, 2025.
2. Incomplete nomination forms will **not** be considered.
3. **Attach a letter from the community service project (charity) verifying and documenting the foregoing project.**
4. All nomination forms and supporting documentation become the exclusive property of The Rough Notes Company.
5. No facsimiles or emails will be accepted.
6. Send completed nomination form and supporting documents to:

The Rough Notes Company, Attn: Community Service Award
11690 Technology Drive • Carmel, IN 46032-5600