



# CAL-VALLEY CONNECTION

## Rolling with the Roehl

### Do you know about prompt claim reporting?

When you experience a loss, prompt claim reporting is crucial. Here's why:

It allows your adjuster to "preserve" evidence, which can directly affect who is found at fault for an accident as well as subrogation. This also applies to property, general liability and workers compensation claims. Prompt notice of a claim can also assist your adjuster in recovering your deductible quicker. If your claim involves a property loss, your adjuster can suggest ways to mitigate or minimize your damage. This also allows repairs to begin earlier.

If you have caused an automobile accident, the earlier the other party hears from your adjuster, the better. The adjuster can quickly obtain their version and rule out injuries before the other party seeks out advice from family/friends and ultimately their lawyer for advice. This also applies to someone who has suffered an injury on the job. Most importantly, did you know your insurance policy requires all claims to be reported as soon as practicable? Failure to do so can actually jeopardize coverage you may have had!

Feel free to contact me for more info.

**Kelly Roehl | Client Service Manager**  
 559-225-1300 Ext: 5153  
 KellyR@calvalleyinsurance.com



## CVI Blood Drive

A few weeks ago we hosted another Cal-Valley Blood Drive at our Fresno Office and we are very happy with the results. The Central California Blood Center was there once again with their blood bus and they were constantly busy taking donations throughout the day. As always, blood donations are always high in demand so it was great to so many participants arrive to donate for a great cause.



We are happy to have exceeded our donation goal and hope to have many more successful blood drives in the future. Thank you to everyone involved in helping us make our blood drive a successful one and thank you to the Central California Blood Center for partnering with us again for this event. We look forward to doing this again soon.

## 2018 Charity Recap

We are always happy to give back to the community and thanks to everyone involved in our referral program we were able to give back to some amazing charities last year. Thanks to all of your referrals, we were able to donate \$540 to LACF (Laotian American Community of Fresno), \$560 to the Central California Food Bank, \$715 to the Kids Cafe 2019 and \$500 to Evangel Homes. Thank you to everyone that participated in our 2018 referral program and for all of your generous referrals. We look forward to continue helping more charities for many years to come.



## CVI Wellness Program

Last year, the agency did it's first health incentive program and many employees were happy to participate in it. Thanks to Liberty Mutual, Imperial, Wilshire and our management team here at Cal-Valley, everyone received a Fitbit and were given a monthly step goal to help motivate them into living a healthier lifestyle. Throughout the year, we challenged one another to eat healthier and keep moving regularly. In the end it all paid off. We had about 30 participants for most of the year and together we walked 70,182,660 steps, which ended up being 28,687 miles. That is a lot of walking! On top of this, collectively we also had 329,106 active minutes. We are proud of everyone in the agency that pushed themselves to meet their goals and get healthier. We are raising the bar this year so wish us luck.



## 2019 Referral Program

You are family to us and we appreciate you entrusting the best interests of your friends and family with us. As our way of saying thank you, we've developed our new "Help Our Community" referral program. A referral is when someone contacts our office and says you referred them. For each referral resulting in a quote/proposal, we will donate \$5 to our featured charity. We love supporting our community and together we can make a difference by giving back to our charities.

### 1st Quarter - Fresno Police Activities

Promotes positive interaction between off-duty law enforcement and youth through social, recreational and educational activities. Teaches good values, acceptable behavior and responsible citizenship.



### 2nd Quarter - Angel Babies

Offers a perinatal program for families whose unborn child has been diagnosed with a terminal condition. Assists families to both welcome and enjoy their baby and, when necessary, say goodbye.



### 3rd Quarter - Visalia Rescue Mission

Partnering with Central California to serve the poor and those in need with the love and power of the gospel of Christ, so they may become God-dependent and contributing members of their community.



### 4th Quarter - CenCal Mentoring Academy

Comprehensive program that connects at-risk youth, dropouts, and truants to mentors, programs and services that will help lead them to success. Helps good kids on a dangerous path find promising futures.



## Employee Appreciation



All of our employees here at Cal-Valley Insurance work hard year-round and the agency always like to give recognition to those who go above and beyond. Last year we had several Account Executives who really put in the work and deserved recognition for their efforts. These individuals strive to do the best job possible for their coworkers and their clients every day. Congratulations to Tom Powell, Kelly Morrison, Clint Phelps and Amy Nevarez Flores on being last year's top Account Executives for Cal-Valley Insurance.

### Account Executive of the Year

### Account Service Manager of the Year

### Employee of the Year



#### Clint Phelps

#### Mariel Matousek

#### Irma Catching

Our 2018 Producer of the Year was again awarded to Clint Phelps. This is the second year in a row that Clint has received this award. Clint once again pushed himself all year long and was determined to reach his primary goal and beyond. He continues to practice his craft, make changes to get better and never gives up. He is an individual that constantly pushes himself and displays the get it done mentality. He is highly respected amongst his coworkers and his clients. He also constantly shows that he is the definition of a team player. Clint has been with us for over 3 years now and we are proud that he represents Cal-Valley Insurance.

Mariel was happy to receive our 2018 Account Service Manager of the Year award. She is someone who we have been able to count on throughout the year and always displays a positive attitude. She played an extremely important role within her department and always said yes to helping with anything we needed. This individual helped train new employees, quoted a lot of new business and stepped up while people were out. We have also received several compliments from clients that she works with. Even though she is one of our newer employees, we are grateful to have her as part of our team and look forward to a long successful career.

Our Employee of the Year award for 2018 was awarded to Irma Catching. She is an individual that always gives 100% and is someone that no matter how your day is going, you can count on her to provide a positive attitude and lift you up. We are always receiving compliments from her clients about the great work that she does for them. Her dedication to the agency is remarkable and we are blessed to have her as part of our team. She is someone that makes everyone else around her a better person. She has been with us for over 5 years and we are grateful to have such a wonderful employee and friend here at Cal-Valley.