



## State IFAPAC 2/24/09 Conference Call Notes

Dennis P. Sunderman, State IFAPAC Chair  
(714) 236-8288 [dennis@lblgroup.com](mailto:dennis@lblgroup.com)

**It will take 15 minutes to absorb this e-mail. Please find the time to dedicate your attention. It will be critical to our success.**

Congratulation to Dan Wells, who has been appointed as the National IFAPAC Western Regional Co-Chair. Dan will replace Steve Rice and will be working with John Brookings to oversee all of the Western Region.

The IFAPAC calendar year is 1-1-2009 through 12-31- 2009.

This is to co-ordinate with the legislative calendar, not the NAIFA calendar.

This creates a challenge for Local Boards and Committees that have a changing of the guard on July 1<sup>st</sup>. We need to prepare to work with the current committee and a new committee during our year.

The annual goal for California is set by National and is as follows:

Total contributions \$300,000 (Total 2008 contributions \$ 223,000)

NAIFA can only meet their goal of \$3,000,000, *if* California produces 10%.

Contributions are broken into two separate accounts:

1. IFAPAC contributions (Must be personal checks, Corporate checks are not allowed)
2. Administrative contributions (Corporate checks are allowed and/or Personal checks can be designated to administration at the request of the donor.)

### **California's 2009 IFAPAC Goals are as follows:**

Political Contributions                   \$275,000

Administrative Contributions       \$ 25,000

Total Contributions                   \$300,000

Increase the number of California contributors to 1000.

We will exceed our goal if we target 40% member participation in every local.

**Horizontal growth is the only practical way to increase and sustain ourGoals.**

In 2008 NAIFA-California concluded with 851 IFAPAC contributors which is 23% of our NAIFA-California membership. The percentage was raised from 16% up to 23% in the November and December due to multiple phone calls to members by the State IFAPAC committee. Reaching 40% can be done but will require that every Local has an IFAPAC Chair that works the program regularly.



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I will tell you Steward Isbell's model is the best I've seen. He regularly sends handwritten letters to every member of NAIFA-Long Beach. He shares with each member what their contribution is, or is not, and asks them for money. He also includes a list of every Local member with their IFAPAC level printed next to their name. It's a very telling story. It recognizes those who are responsible contributors and those that are not. As a result NAIFA-Long Beach exceeded 40% participation!

I expressed my opinion regarding fundraising on the call, asking for money, or more money, is one thing. Providing compelling reasons for a member to understand why we need the PAC is another.

Help them to understand! The message is the plain and clear. The Federal and State deficit is so overwhelming that Legislators are bound to do anything to raise revenue. The targets are few. Reduce the tax deduction for mortgage interest rates *or* tax insurance products. The later includes taxing accumulating values of life and annuity products, and death benefits.

Legislators believe that the insurance industry is the path of least resistance. We need Members to maintain the respect of our Legislators **and money to buy their attention.**

### **Here's what WE need to accomplish:**

1. A PAC Chair in every Local, who has a clear understanding of our goals and how to get there. They need to be separate from any other position.
2. Order the Terry Hedley presentation through [caroln@naifacalifornia.org](mailto:caroln@naifacalifornia.org). And, watch it. Then arrange for your local to watch it as soon as possible.
3. Order the Michael Dunn presentation through [caroln@naifacalifornia.org](mailto:caroln@naifacalifornia.org) and share it with your local as soon as possible.
4. Become familiar with Advocacy web pages at:
  - a. NAIFA [www.naifa.org](http://www.naifa.org)
  - b. NAIFA-California [www.naifacalifornia.org](http://www.naifacalifornia.org)
5. Review your local reports to understand your membership:
  - ▲ Who is contributing?
  - ▲ Who is not contributing?
  - ▲ Who has lapsed and can come back.
6. Establish your goals and measure your progress monthly.



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7. Always carry a PAC application and ask NAIFA members if you support the PAC.

**NOTE ON RULES:** Do not ask non-members for contributions and *NEVER ask for PAC contributions from the podium at a NAIFA meeting when Non Members are present!*

State IFAPAC committee members:

North-Randy Judge [judgeus4@aol.com](mailto:judgeus4@aol.com)

South Steward Isbell [sisbell@farmersagent.com](mailto:sisbell@farmersagent.com)

A minimum \$300 annual PAC contribution is required to be a State PAC committee member. I would like increase the size of the State committee. If you know anyone with a passion for the PAC, that can invest a little time, please ask them to call me at (714) 236-8288.

The July 2009 ALCs will not include PAC training, PAC training will be done via a WEBINAR, the dates are yet to be determined.

**Please Mark Your Calendars** for the following important events:

### **Statewide IFAPAC Conference Calls:**

All calls will begin at 9:00 am and run approximately 40 minutes.

Tuesday, April 21<sup>st</sup>

Wednesday, June 23

Wednesday, Sept 2<sup>nd</sup>

Wednesday, Oct 21<sup>st</sup>

Wednesday, Dec 9<sup>th</sup>

**NAIFA-California Annual Meeting**, May 19 2009

Celebration 75, a Diamond Jubilee

**Day On r The Hill**, May 20 2009

### **Fall Advocacy Forums**

**Southern** - November 10, 2009, 10:00 am – 1:00 pm

Old Ranch Country Club, Seal Beach, CA

**Northern** - November 11, 2009, 10:00 am – 1:00 pm

The Sacramento Sutter Club, Sacramento, CA



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Fundraising PAC theme for Annual Meeting and Day On The Hill is:  
"75 in 75"

Annual Meeting fundraising goal	\$7,500
Day on the Hill fundraising goal	<u>\$7,500</u>
Our Two Day Goal is	\$15,000

### Fundraising Ideas:

- \*Ask Member to Join the PAC
- \*Ask for Upgrade to next level
- \*Raffle Southwest Airline Tickets  
(Two round trip tickets to NAIFA-National in Orlando)
- \*Raffle - 32 inch LCD HD TV
- \*Contest - Jelly Belly count (Wins something TBD)
- \*Raffle - Laptop (\$750 value donated by Randy Judge)
- \*Diplomats receive a bottle of wine
- \*Upgrades to Diplomat qualifies for wine

Thank you for your attention today. We are in this together!!

Please call ME at (714) 236-8288, if you have specific questions and remember the NAIFA-California office is open to help you.

Sincerely,

A handwritten signature in blue ink, appearing to be "Dennis Sunderman".

Dennis Sunderman  
NAIFA-California IFAPAC Chair