

TIME TO REGISTER

Annual Meeting and "Sales Exposition" May 22 - 23, 2012

Embassy Suites Monterey Seaside, 1441 Canyon Del Rey, Seaside, CA 93955 (831) 393-1115

EXPAND YOUR HORIZONS

In Monterey



INNOVATE
EDUCATE
MOTIVATE



Robert Miller,
M.S., M.A.



Ian Hill



Tom Hegna,
CLU, ChFC, CAL



Angela Frangieh



R. J. Kelly,
CLU, ChFC, MSFS

Annual Meeting and “Sales Exposition” Schedule of Events Tuesday, May 22, 2012 and Wednesday, May 23 2012

Don't miss this valuable Annual Meeting and “Sales Exposition”. It is our goal to bring you Bottom Line Value and Sales Ideas throughout our program; network with peers from around the state; elect new leadership to NAIFA-California; and browse the Exhibit area to see “what's new” in products and services for insurance and financial advisors.

Annual Meeting - Tuesday, May 22, 2012*

- 10:30 AM - 5:00 PM **Registration & Exhibit Hall Open**
enjoy refreshment breaks throughout the day while browsing fascinating exhibits of the latest products and services designed to build your “bottom line”
- 10:30 AM **Registration and coffee with Exhibitors**
- 11:30 AM - 11:45 AM **Opening Session**
- 11:45 AM - 12:30 PM . **Luncheon**
- 12:30 PM - 1:00 PM **Distinguished Service Award Recipient**
“Larry R. Lee, CLU, ChFC”
- 1:00 PM - 1:30 PM **Exhibit Hall - Desert Break**
- 1:30 PM - 2:00 PM **NAIFA-California Business Session - Budget Review**
- 2:00 PM - 3:00 PM **“Are You Dead Yet?” Ian Hill**
- 3:00 PM - 3:30 PM **Exhibit Hall - Refreshment Break**
- 3:30 PM - 4:00 PM **Legislative Update**
Michael S. McCaffrey, LUTCF, Shari McHugh
- 4:00 PM - 5:00 PM **“Paychecks and Playchecks”**
Tom Hegna, CLU, ChFC, CASL
- 5:00 PM **Adjournment**
- 6:00 PM - 6:45 PM **IFAPAC Reception** (*Diplomat Contributors & Above and all NEW Contributors who join on site*)
- 7:00 PM - 9:45 PM **President's Reception & Banquet ★**
“Dress: “Surf / Beach Theme”



★ Optional Ticketed Event

*Schedule subject to change without notice

Host Hotel

Embassy Suites Monterey Seaside
1441 Canyon Del Rey
Seaside, CA 93955
(831) 393-1115



Group Reservations

Please contact our host hotel directly for reservations. The NAIFA-California special group room rate of **\$159 single or double** is good until **Monday, April 20, 2012** - make your reservations early! On-line at: http://embassysuites.hilton.com/en/es/groups/personalized/M/MRYESES-NAI-20120516/index.jhtml?WT.mc_id=POG

EXPAND YOUR HORIZONS

In Monterey



**INNOVATE
EDUCATE
MOTIVATE**

Sales Expo - Wednesday, May 23, 2012*

- 7:00 AM - 2:00 PM **Registration Open**
- 7:00 AM - 8:30 AM **Past State Presidents Breakfast *****
(***By Invitation Only)
- 7:00 AM - 7:30 AM **IFAPAC “New Contributors” meeting with Ian Hill**
- 7:30 AM - 8:00 AM **Members that bring in five or more “new members” between 10/1/11-5/20/12 meeting with Ian Hill**
- 8:00 AM - 8:30 AM **Online Leadership Academy Graduates meeting with Ian Hill**
- 8:30 AM - 9:00 AM **YATs meeting with Ian Hill**
- 8:00 AM - 9:00 AM **Coffee with Exhibitors**
- 9:15 AM - 10:00 AM **“The State of NAIFA”**
Robert A. Miller, M.S., M.A.
NAIFA President
- 10:00 AM - 11:00 AM .. **Workshops**
- R. J. Kelly, CLU, ChFC, MSFS**
“Successful Succession... Fence at the top of the cliff ... or ambulance in the valley?”
 - Angela Frangieh**
“Zero to MDRT in Twelve Months”
- 11:00 AM - 11:30 AM .. **Exhibit Hall - Refreshment Break**
- 11:30 AM **Luncheon**
- 11:45 AM - 12:30 PM ... **NAIFA-California Business Session**
Board of Directors and Delegate Body meeting with election and installation of Officers
- 12:30 PM - 1:30 PM **Sales Idea Exposition**
Four 12 minute Sales / Business Ideas
Bradford L. Elman, CLU, Elman Insurance
James Farden, CLU, RHU, Principal Financial Group
Barbara Hanson, LTCi
Mark E. McKell, TEAM Financial Partners
- 1:30 PM - 2:00 PM **Exhibit Hall - Dessert Break**
- 2:00 PM - 2:15 PM **Exhibit Raffles Announced on Main Stage**
- 2:15 PM - 2:45 PM **Town Hall Meeting**
- 2:45 PM - 3:45 PM **“I Will Move the World” Ian Hill**
- 3:45 PM **Adjournment**

*Schedule subject to change without notice

Keynote Speakers & Workshop Speakers



Ian Hill, came from a humble beginning as an adopted, at-risk youth... to a business career managing 1,000 employees... to spearheading life-changing projects... to first-of-their kind initiatives around the world, Ian Hill has stood as a leader for positive change in the lives of individuals, workplaces and communities. Today, Ian's latest business venture is the first of its kind in North America, *TechAbility*, which will manufacture world class computers through a workforce that is completely staffed by people with physical or intellectual challenges. This social enterprise, is sure to make a great impact on the employment of individuals that come from unique labor pools. Ian's latest humanitarian project is Let Them Be Kids, a first of its kind initiative to build community capacity while building playgrounds in areas of extreme need. LTBK has geographically specific programs for the USA, Canada and the World.



Tom Hegna, CLU, ChFC, CASL is the President of TomHegna.com. He is a former First Vice President of New York Life. Originally from Glenwood, Minnesota, he attended North Dakota State University on an Army ROTC Scholarship and graduated with honors. He was commissioned in the U.S. Army and spent 6 years on Active Duty and another 16 ½ years in the US Army Reserve and retired as a Lieutenant Colonel in 2006. In 1988, Tom started his career in the insurance industry with MetLife. He qualified for membership in the Million Dollar Round Table (MDRT) in each of his first three years (MDRT is recognized throughout the industry as the standard of sales excellence in the life insurance and financial services business). In July, 1996, he joined New York Life. He was promoted to Vice President in March 2006 and First Vice President in March 2010. In August 2011, he started TomHegna.com and now speaks for numerous companies all over the world. He is author of the book "Paychecks and Playchecks." He resides in Fountain Hills, Arizona.



R. J. Kelley CLU, ChFC, MSFS is Founder and Managing Principal of the Wealth Legacy Family of Companies headquartered in San Diego, California. The Wealth Legacy Family includes six self-supporting but integrated companies providing insurance, investment, litigation support, insurance contract analysis, family wealth counseling and business consulting services." He began in the financial services industry in August 1977 in Spokane, WA, relocating to San Diego in November 1985. He has earned several industry designations in addition to a Masters of Science in Financial Services with an emphasis in taxation, and is an IAR of his firm, Wealth Legacy Group, Inc., a Registered Investment Advisor. R. J. has served on the Spokane Life Underwriters Board of Directors and as ad hoc committee liaison to the San Diego Life Underwriters. He is a thirty year member of the Million-Dollar Round Table, a Life, Qualifying and Honor Roll member, three-time Top of the Table and four-time member of Court of the Table qualifier.



Angela Frangieh is a graduate of the University of San Francisco with a B.S. degree. Ms. Frangieh opened her agency in April 2009. As a new agent at State Farm, she was able to achieve the top 100 agents in the Country. For the 2010 business year, she achieved what State Farm calls the "grand slam" . . . Presidents Club in Life, 6 time Senior Vice Presidents Club, MDRT, and Chairman's Circle. She feels very passionate about the work she does and feels privileged to serve her community. Angela, a fifth generation entrepreneur, has been married to Marcel for 23 years. Her son Joe is working toward becoming a State Farm Agent, and daughter, Sydney, is doing undergraduate work at Sonoma State University.



Robert A. Miller, M.S., M.A. is our NAIFA President and is a Partner with his father and brother at Miller-Pomerantz and Associates in New York, New York. Mr. Miller is a licensed registered representative with New York Life Securities, the broker dealer of the New York Life Insurance Company. Robert and his partners service over six thousand clients. A Past President of NAIFA-New York City and NAIFA-New York State, Robert's outstanding service to these organizations has been recognized with the Ben Brewster Government Relations, Julian Myrick, and Spencer L. McCarty awards. He is a graduate of the NAIFA Leadership in Life Institute (LILI) and is a member of the Million Dollar Roundtable (MDRT). Robert resides in New Canaan, Connecticut with his wife, Kathy, and has five children and stepchildren.



EXPAND YOUR HORIZONS

In Monterey

NAIFA
California

INNOVATE
EDUCATE
MOTIVATE

REGISTRATION FORM

ANNUAL MEETING & SALES EXPOSITION

May 22-23, 2012

Embassy Suites Monterey Seaside

1441 Canyon Del Rey, Seaside CA 93955 (831) 393-1115

PLAN AHEAD — Complete and return this form with payment to NAIFA-California by May 11, 2012, 5:00 pm

▶ PERSONAL INFORMATION

NAIFA Member ID _____ NON-MEMBER

Local Association _____

If you are not a NAIFA-California Member, what other association(s) are you affiliated with?

FULL NAME with DESIGNATIONS _____

INFORMAL NAME for badge ONLY if different from Full Name _____

COMPANY _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____ FAX _____

CELL _____

EMAIL _____

▶ IN CASE OF EMERGENCY

NAME _____

RELATIONSHIP _____

WORK PHONE OR HOME PHONE _____

CELL _____

▶ SPOUSE/GUEST REGISTRATION

SPOUSE or GUEST FULL NAME with DESIGNATIONS (If attending) _____

SPOUSE / GUEST INFORMAL NAME for badge ONLY if different from above _____

Please check all items below that apply

▶ REGISTRATION FEES (TWO-DAY EVENT)

Registration includes access to breakfast, refreshment breaks, exhibit hall, speaker sessions, workshops, **Tuesday and Wednesday lunches**. Tuesday's Reception and Banquet is an optional ticket.

Member with Tues Lunch/Wed Lunch and Breaks..... \$190

YAT Member with Tues Lunch/Wed Lunch and Breaks (*Discounted*) \$ 95
(YATs are Members under 40 or 5 years or less in the business.)

Non-Member with Tues Lunch/Wed Lunch and Breaks..... \$290

Guest/Spouse** with Tues Lunch/Wed Lunch and Breaks \$100

▶ WORKSHOP SESSION (10:10 AM - 11:00 AM, MAY 23, 2012) (CHOOSE ONE ONLY)

R.J. Kelly, CLU, ChFC, MSFS *"Successful Succession... Fence at the top of the cliff ... or ambulance in the valley?"*

Angela Frangieh *"Zero to MDRT in Twelve Months"*

▶ OPTIONAL TICKETED EVENT

PRESIDENT'S RECEPTION _____ x \$85 = _____
AND BANQUET Tuesday, May 22, 2012 ... QUANTITY AMOUNT



▶ **LATE REGISTRATION FEE** \$ 35
applies to all registrations received after May 11, 2012, 5:00 pm

▶ **TOTAL PAYMENT DUE** \$ _____
Please add all options above

▶ **Please let us know if you have any special dietary needs:**

▶ METHOD OF PAYMENT

Enclosed is our check to NAIFA-California for the **TOTAL** indicated above
Charge our MasterCard or Visa for **TOTAL** indicated above.
We Do Not Accept American Express

CARD NUMBER _____ EXPIRES _____

PRINT CARDHOLDERS NAME _____

CARDHOLDERS SIGNATURE _____

**Registration offered to all NON-LICENSED, NON-MEMBER spouse or guests attending with registered members or non-members; includes access Tuesday lunch, Wednesday lunch, refreshment breaks, exhibit hall and speaker sessions.

CANCELLATION POLICY FOR REGISTRATION FEES:

*Cancellation and refund requests must be received in writing at NAIFA-California by 5:00 PM no later than May 11, 2012.
No refunds will be issued after Friday, May 11, 2012.*