



# CAL Advisor

April 29, 2009

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## NAIFA-California

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## Mark Your Calendars!

July 22, 2009

Northern Governance &  
Membership Conference  
Sacramento Sutter Club  
10:00 am – 2:00 pm

July 23, 2009

Southern Governance &  
Membership Conference  
The Old Ranch Country Club  
Seal Beach  
10:00 am – 2:00 pm

## Greetings. . . NAIFA-California Members

By **Michael S. McCaffrey, LUTCF**  
**NAIFA-California President 2008 – 2009**  
[MCCAFFREY1@aol.com](mailto:MCCAFFREY1@aol.com)



Everything is being readied for our 75<sup>th</sup> Annual Meeting and Day on the Hill, May 19 and 20 in Sacramento. Have you made plans to join us as NAIFA-California celebrates 75 years as the premier agent and broker insurance organization? I hope so! It will indeed be a memorable event, with wonderful motivational and industry speakers, company exhibits, important government updates, and, of course, the recognition of the successes enjoyed by many of our Locals.

The Annual Meeting and Awards Dinner are always the highlight of the year for any President. I am no exception! I very much look forward to gathering with local leaders and members to share stories and hear first hand what is working for our members. A fitting climax to the "Year of the Local".

*Looking forward to seeing You in Sacramento!*

	<p><b>What Do We Do Now?</b> <b>Van E. Mueller, LUTCF</b>, is a Registered Representative with the Wisconsin Agency of New England Financial Services. He is an active member of MDRT having qualified for Court of the Table in 1990 and Top of the Table for the last 18 years. He also served as a Past-President of NAIFA-Milwaukee.</p>	<p><b>May 19-20, 2009</b> <b>Annual Meeting and Day On The Hill</b> <b>Attendee Registration Form</b> <b>&amp; Schedule of Events</b></p>	
	<p><b>State of NAIFA</b> <b>John J. Healy, CAE</b> is CEO of NAIFA. John has more than two decades of experience leading organizations through periods of strategic change while taking them to new heights of influence and success.</p>		
	<p><b>Market Tune Up - How to Get to the Top and Stay at the Top</b> <b>Guy E. Baker, CLU, MSFS</b> is a 39-year MDRT member with 31 Top of the Table qualifications. Baker has spoken at the MDRT Annual Meeting 15 times and has written hundreds of articles for industry publications and several books. He was named as one of Worth Magazine's top 250 Registered Investment Advisors.</p>		<p><b>No One Can Stop You but YOU</b> <b>Walter Bond</b>, after graduating from the University of Minnesota with a BA in Communications, overcame a devastating injury to become the first NBA rookie free agent ever to start on opening night. Walter, the young man who never, ever gave up on his dreams, went on to have an eight-year professional basketball career, for the Utah Jazz and the Detroit Pistons. Toward the end of his basketball career, Walter changed his profession, but never changed his winning attitude.</p>

## Member Benefits - California Pilot Program

Now CA insurance agents can get the NAIFA-endorsed E&O insurance with a reduced membership fee.



This trial program is a **great opportunity for all California agents**. It will allow agents that are not NAIFA Members, and who reside in the state of California to apply and qualify for the E & O program. Those eligible to join NAIFA will then pay full state and local dues, however, NAIFA national dues will be set at zero for the first year of membership. At the time of renewal, and in order to maintain Errors & Omissions (E & O) insurance coverage, members who joined NAIFA as a result of this pilot program will then pay full dues.

Aon and NAIFA will continuously track the results of this pilot program and will make definitive determinations of a possible pilot expansion depending on final results and figures.

Currently, all NAIFA members are eligible to receive E & O Coverage through Aon. To learn more, and to get a quick rate quote, please visit [www.naifainsurance.com](http://www.naifainsurance.com).

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## Legislative Update



By Michael Ables, LUTCF  
Chair, Government  
Relations Committee



Shari McHugh  
Legislative  
Advocate

Listen to the California  
General Agents & Agency  
Managers  
**Conference Call 4/23/09**  
An Update on State and  
Federal Legislative Issues

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## NAIFA-California has an Easy to Navigate Website

Please take a tour to see what is happening in Advocacy and Member Benefits!

National Association of Insurance and Financial Advisors-California  
Connections That Count

Home  
Calendar of Events  
About Us  
Advocacy  
Member Benefits  
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CA Dept of Insur.  
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**CELEBRATION 25**  
NAIFA  
California  
1934-2009  
25th Anniversary  
May 19-20, 2009  
Annual Meeting and  
Day On The Hill

Attendee Registration  
& Schedule of Events  
Sacramento Embassy Suites,  
Sacramento  
Room Rate \$189.00 Single Double  
Make Room Reservations Online  
Deadline for room reservations is  
April 27, 2009  
or until rooms block is sold out  
Exhibiting and Sponsorships  
are now available!

A special thank you to the  
following sponsors for their  
continued support!

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Now CA insurance agents can  
get the NAIFA-endorsed E&O  
insurance with a reduced  
membership fee.

2008-2009 Award Applications:  
2008-2009 Local Bobo Award of Excellence Application  
(Deadline for applications submission is June 30, 2009)

The Year of The Local

You may go directly to  
our new home page, by  
clicking on the picture of  
the home page.

