



CAL Advisor

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NAIFA-California

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**Mark Your
Calendars!**

**NAIFA-California
Annual Meeting &
Day On The Hill
May 19-20, 2009**

Hire A "B to Y" Assistant



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As I was working on my business plan, I knew that I couldn't keep doing the same things and expecting different results. The reality is that, just like most of us that get into the insurance and investments world, we are great at making sales, talking to people and coming up with great ideas. **BUT NOT GOOD AT IMPLEMENTING THEM.** Whether it's because we're too busy or our mind is going a mile a minute, without the right help we won't implement half our good ideas. I know I'm willing to host a workshop or seminar and I will show up to do the presentations and appointments, but I need someone to take care of everything else in the middle, a "B to Y" assistant.

Most of us are good at some things, but need help in other areas. We all need a "B to Y Assistant" at one time or another. So what qualities should you look for?

An assistant should have a pleasing personality. She or he will be working with clients so she or he should be a "people-person" with excellent client-relationship skills.

An assistant should have complementary skills to the Advisor. If you are a big-picture person, then you will need a detail-oriented person to fill in the blanks. A detail Advisor needs a more global thinker.

An assistant should be very organized, detail oriented, and have the ability to delegate tasks when necessary and follow through to ensure tasks are completed on time (Even when it's from you!)

An assistant should be intensely curious and not be afraid to ask questions. If she or he is responsible for marketing or special projects, her or his understanding of the steps to success are critically important.

An assistant should have energy and drive. In order to keep up in today's fast-paced marketplace, a qualified support person should be able to handle several tasks at once.

And, finally, an assistant should be diplomatic. Clients can be very demanding and must be told "No" occasionally without them becoming upset. A good assistant will be able to do that with tact and professionalism.

It's important that you take your time to find the right fit for your company and more importantly your personality. Also, be prepared to pay well. This talent comes from experience and can command a higher pay. However, if you do this, you will see a great return on your investment, will become more productive and you'll get projects off the ground while only doing the things you're good at and enjoy. ([top](#))

Legislative Update



By Michael Ables, LUTCF
**Chair, Government
Relations Committee**



Shari McHugh
Legislative Advocate

***Click on the link
and get the
details from the
Monthly
Legislative
Update!***
([top](#))

<http://www.naifacalifornia.org/Advocacy/PDFdocs/LegUpdates/2008/Legislative%20Update%206-08.pdf>

Greetings. . . NAIFA-California Members



By Michael S. McCaffrey, LUTCF
NAIFA-California President 2008 – 2009
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The summer months are usually reserved for large doses of rest, relaxation, and fun with family and friends. I truly hope you are following this recipe, and the time has been enjoyable.

Your Leadership Team has used this time to help create some exciting things for you for the balance of 2008 and beyond. This year represents a milestone for our Association. NAIFA-California will be turning 75! Quite an achievement . . . certainly one that each of us should look to with great pride.

You will see references to this in the months to come, all culminating in our gala celebration next May in Sacramento. Watch for details!

Speaking of celebrations, did you know that NAIFA-California has dubbed our 75th year, “The Year of The Local?”

That is because our Locals represent our main constituency, our main focus, our most valuable asset. In everything we do, we must continually ask, how can we better assist our Local Associations in meeting the needs of their members?

To that end, we have devoted much energy and resources to reach out to Field “Agency Management.” We wanted to go directly to Managers and General Agents to hear what they had to say. Much of what we learned from these meetings was shared with Local Leaders at the recent ALC meetings in July. NAIFA-California will continue to have dialogue with these key people to further re-engage them into NAIFA, and to suggest ways they can directly support our Locals.

Life Insurance Awareness Month will be here in a few short days. I want to recognize the efforts of NAIFA-Los Angeles and NAIFA-Santa Barbara. This year these Locals continue their history of engaging their local politicians in supporting LIAM, and I encourage all other Locals to do the same. LIAM continues to be on of the best Public Relations opportunities we have to highlight the important work being done by our members. Take advantage of the wealth of resources available. It will pay dividends throughout the year.

NAIFA’s 2008 Annual Convention and Career Conference will be in San Diego in early September. Let me add my voice to the others you may have heard in extending an invitation to attend this gathering of agents and brokers from around the country. By all accounts, there are some very exciting things going on at NAIFA. Please make the short trip down to San Diego to see what all the excitement is about. I will look forward to personally visiting with you in the California Suite!



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