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CAL Advisor E-Newsletter

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Insurance and Financial Advisors
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Newsletter

April 2011

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Quick Links...

- [Our Website](#)
- [Calendar of Events](#)
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- [Board of Trustees](#)



APIC

[Sign up as a California legislative Key Contact:](#)

If you know your member of State Legislator in the California Senate or Assembly, let us know so we can add you to NAIFA's growing list of politically active agents.

[Congressional Online Legislative Contact Form:](#)

If you know your member of Congress in the U.S. House or Senate, let us know so we can add you to NAIFA's growing list of politically active agents.

[Instructions for Scheduling Legislative Appointments in District or at the Capitol](#)

Advocacy, Governance, and Bottom Line Benefits: What We Are All About



Darrell W. Shideler,
CLU, ChFC, CFP®,
LUTCF, FIC
NAIFA-California
President

It all happened in March, it's about to happen in May, and it is all about you.

May 17th and 18th is our upcoming NAIFA-California Annual Meeting and Sales Exposition. What a line up! Rosemarie Rossetti, the 2011 National Disability spokesperson and MDRT main platform speaker; Terry Headley, 2011 NAIFA President; Ian Hill 2011 MDRT Main Platform speaker; four practice specialty breakout sessions; 30+ exhibitors; and our special NAIFA-California 10 minutes of sales ideas from 11 top producers in 120 minutes. "Dreams do Begin Here" and it is all about you!

By now, I'm sure you have heard about the SEC "Pay to Play" rules announced on March 14, 2011, and how that has impacted NAIFA, our members, and our industry. I am sure you are also concerned about what this means for our state and our ability to connect with our State Assembly and Senate members, and how this will also affect your bottom line benefits. On March 28th and 29th your NAIFA-California Board of Trustees met and discussed and acted on these concerns.

First, your State Board of Trustees has decided to not take immediate drastic action, but to allow for ample time to consider our options, if indeed there becomes no successful resolution to the SEC's current ruling which has dramatically limited our PAC.

Second, we decided to begin legal investigations to potentially operate our own state PAC that would conform to the SEC ruling, and allow us to meet our membership responsibilities for state legislative connections. We are determined to take actions that would be appropriate for our members, and protect our ability to be politically active in our state, while protecting our commitment to successful advocacy for your benefit. We do know that we will have a PAC one way or another, and it will benefit California.

Third, we have renamed our Prospector Fund to a more modern name that represents its original charter, and we are reinvigorating giving to this fund for the purpose of allowing us the ability to share in legal actions that impact our clients, our members and our industry. The new name is designed to be direct and straight forward. The new name is the "NAIFA-California Legal Defense Fund". This fund has been in existence for over 2 decades and is in place to allow us to legally challenge certain legislative and regulatory actions that impact our clients, members and industry. We honor our time honored democratic process because it is all about you.

And what about you? Let me submit another monthly sales concept that there are only four ways that you can give away your money; 1) give it to yourself; give it to your children, family gifting; 2) give it to your nonprofit passion; charitable donations; 3) spend it; or 4) give it to the government, taxes. If you were to consider how you would like to allocate your funds, would you please



You can Join, Renew and Obtain information critical to NAIFA Members by visiting

www.naifa.org

[Download a Quick Guide to NAIFA's Website Here](#)

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Let's thrive!



Bronze

tell me what percentages you would allocate to these four areas? At this time, without any planning, can I share with you how you are currently allocating your assets? Do you see any differences? It seems like you have more in the government area than you would like. Can I share with you an idea that will more conform your assets to your distribution strategy? See me at the Expo for the answer, because it is all about you!

See you in Anaheim . . . only a short distance from Disneyland . . . "Where Dreams Begin"!

The 20th Annual NAIFA-California Distinguished Service Award Recipient is Announced



R. Jan Pinney,
CLU, ChFC, CPCU

NAIFA-California proudly announced that R. Jan Pinney, CLU, ChFC, CPCU, President and CEO of Pinney Insurance Center, Inc., is the recipient of the 20th annual NAIFA-California Distinguished Service Award (DSA). The DSA is given to recognize individuals who have provided meritorious service to the insurance and financial services industry and the community at large in ways that enhance the image of the agent/advisor. Pinney will receive the award May 17, 2011, at the NAIFA-California Annual Meeting in Anaheim, California. [Click here for more Information](#)

2011 Annual Meeting and Sales Exposition May 17-18, 2011

Embassy Suites - Anaheim South
11767 Harbor Boulevard
Garden Grove, CA 92840
(714) 539-3300



[Schedule of Events and Speaker Info](#)

Registration Forms -**Deadline May 6, 2011**

[Member Registration Form](#)

[YAT Member Registratin Form](#) and YAT Schedule of Events
[Non Member Sales Exposition Registration Form](#) - Wednesday,

May 18, 2011, from 8:30 am. - 10:30 am. Invite a non-member to get a "Taste of NAIFA" with two hours of non-stop Sales and Business ideas.

Eleven Advisors will be sharing their sales and business ideas that have helped them in their own careers.

- ? Denise P. Carcel
- ? Misty DeLomba, CLU
- ? Randhir S. Judge, F.L.I.A., LUTCF
- ? R. J. Kelly, CLU, ChFC, MSFS
- ? Larry M. Lambert, CLU, CFP, RFC
- ? R. Jan Pinney, CLU, ChFC, CPCU
- ? Ryan J. Pinney, CSFP
- ? Gail M. Rife
- ? Gloria C. Rull
- ? Darrell W. Shideler, CLU, ChFC, CFP, LUTCF, FIC
- ? Dennis P. Sunderman

[For more information on Speakers Click Here](#)

Room Reservations - discounted rooms rates are available **until**



Monday, April 25, 2011. The NAIFA-California special group room rate of \$139 single or \$149 double at the Embassy Suites - Anaheim South. Make your reservations online today!

Monthly Legislative Update

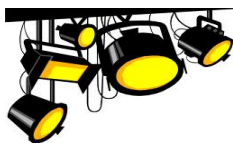


Michael S.
McCaffrey, LUTCF
Government
Relations Chair

[Legislative Update](#)
Get Details on
Legislative Victories
and Current Status
of Legislative Bills.



Shari McHugh
Legislative Advocate



Spotlight on Benefits

Bottom line - NAIFA provides value for your membership!

NAIFA Quality Award Application Deadline Extended!
The deadline to apply for the 2011 NAIFA Quality Award has been extended to May 1st. [Apply online today!](#)

For 65 years NAIFA's Industry Awards Program has recognized excellence among insurance advisors. The new NAIFA Quality Award updates the traditional industry award program to provide opportunities for all NAIFA members, regardless of practice specialty, to demonstrate to your clients and peers your commitment to quality.

The NAIFA Quality Award recognizes advisors in any career stage and in any practice specialty for your commitment to exceptional:

- Professionalism through education and earned designations,
- Production measured by performance metrics customized for each practice specialty,
- Adherence to the NAIFA Code of Ethics, and
- Service to your industry association.

Applicants have the option of meeting separate criteria in each practice specialty of Life Insurance & Annuities, Financial Advising & Investments, Health Insurance & Employee Benefits or Multiline Sales. Applicants also may combine production from multiple practice specialties as part of the award's multiplier bonus system.

Questions? Please contact [Matt Burruss](#), NAIFA Program Manager, Professional Development & Education



James A. Farden,
CLU, RHU
NAIFA-California
Member Benefits
Chair

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