

**From:** NAIFA-California Member Information [naifa-california@naifacalifornia.org]  
**Sent:** Wednesday, June 08, 2011 10:18 AM  
**Subject:** CAL Advisor June 2011 E-newsletter

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	<h1>CAL Advisor E-Newsletter</h1>	<p>National Association of Insurance and Financial Advisors California 1451 River Park Drive Suite 175 Sacramento CA 95815 (916) 646-8600 Fax (916) 646-8130 office@naifacalifornia.org www.naifacalifornia.org</p>
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Newsletter

June 2011

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- 2011 Annual Meeting - Exhibitors



1451 River Park Drive #175  
Sacramento, CA 95815-4520  
(916) 646-8600

**Quick Links...**

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

**Have You Registered?**

**Programs and Member Benefits Webinar**

**When:**  
**Wednesday, June 22, 2011**  
9:00 am - 11:00 am

**Invited:**  
*Presidents, President-Elects, Professional Development  
Chairs, Program Chairs, Member Benefit Chairs*

**To register go to:**  
<http://www.anymeeting.com/>

## The Brick in the Wall: Dual Membership Platform



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

On May 17th and 18th, I had the honor of presiding over our NAIFA-California Annual Meeting and Sales Exposition. It was a grand affair, with eighteen speakers, thirty-eight exhibitors, a grand dinner party in Southern California beach attire, and the election of our new officers for 2011-2012. We had the opportunity to hear from Rosemarie Rossetti, the Disability Spokesperson for the Year; Terry Headley, our

NAIFA National President; and Ian Hill, a nationally recognized motivational speaker. We held four practice specialty breakout sessions that you could choose two of, and we concluded, on Wednesday with eleven, ten minute, sales ideas speakers. It does not get much better than that! And, next year will be even better, but what about that brick in the wall. . . .

Historically, each term is to be marked by something significant that the Board had accomplished during the year. This year is no exception. This year we have worked to broaden our member benefits by providing a platform to the member. This platform starts with an enhanced website that provides benefit connections to National, You Tube connections for learning and video and online articles, besides our communication center for our state and locals. If you are a member that has not gone to a local meeting and would like to stay connected, you now have the means. An additional member benefit is the enhancement of the Sales Expo. As you can see, we have put together an outstanding array of benefits, designed around our practice specialties, providing business growth, sales ideas, and practice development. Just be on-line and attend the Annual Meeting and we have more than covered your

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## Have You Registered?

### Advocacy and Grassroots Training Summit *One Day Only!*

#### Invited:

1. *Political activists who are either currently APIC "key contacts", or would like to be one in the future.*
2. *PIC Chairs and other highly involved or interested parties who like politics and political involvement will find this session invaluable.*

#### When:

**July 13, 2011**

10:00 am - 2:00 pm, Sacramento Sutter Club

#### Register Forms and Details:

[PDF Registraion Form](#)

#### Registration Deadline:

July 1, 2011

## Have You Registered?

### Association Leadership Conferences

#### Invited:

*Presidents, President-Elects, National Committeepersons, Membership Chair, Membership Committee Members and Local Executives*

#### When:

**July 13, 2011**

10:00 am - 2:00 pm, Sacramento Sutter Club

**July 14, 2011**

10:00 am - 2:00 pm

Old Ranch County Club

Seal Beach, CA

#### Register Forms and Details:

[Microsoft Word](#)

[PDF](#)

#### Registration Deadline:

July 6, 2011



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

[www.naifa.org](http://www.naifa.org)

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

## Our Sponsors

investment in dues.

But what about the local? Yes, you should attend your local meetings. Why? Let's start with the sharing of ideas on a monthly basis and the mentoring opportunities that are present. Now, let's move to the opportunity for political involvement. To protect your business, it would be a great idea to see your Assembly Member, State Senator, or House Representative. And, it is even better to do that with your local association, in a group, with training and support. And, what about these ideas: leadership development through LILI, charitable involvement in the community, great public relations, and simply being part of your professional association. Being part of the local can only enhance your membership investment.

Thus, we have put together a basic track of internet engagement and one major meeting that more than pays for your membership. We would invite you to attend your local meetings and get involved to turbo-boost your career, and lift and elevate your whole person. I know, because I use our web site regularly, I attend our local meetings, and I have seen my Legislators. I have had the honor to lead you this past year, and I have had my best production year ever! Membership has more benefits than you can ever imagine, and it is as easy as getting on our website at [www.naifacalifornia.org](http://www.naifacalifornia.org). What will your brick be?

Before I close, I am compelled to acknowledge our 2010-2011 Board of Trustees and great staff. To be able to provide these ongoing benefits NAIFA-California needs folks to implement. This year we have been blessed with a wonderful Board that has given of their time, talent and treasures to devise and initiate the strategies. But even with our Board we would never have been able to have implemented as well as we did without our great staff. A special thank you must go out to Carol Nicolaysen and Kay Nauta for their services in supporting our members, providing outstanding communication, and assisting the Board in carrying out our mission; and, last, but certainly not least, I would like to thank David Dellinger for his incredible commitment, energy, and devotion to our state and to all of the locals he assists. To be a great state, it takes all of us: Members, local leadership, state volunteers, and great staff, to make it all happen.

## All Members Must Complete the IFAPAC Directive in Response to the New SEC Rule

The new SEC "Pay to Play" Rule went into effect on March 14. Although this new Rule may affect only a few NAIFA members, the NAIFA National Board, in response to several companies' reactions to the Rule, has decided to adjust its IFAPAC fundraising procedures for *all* NAIFA members. At present, national IFAPAC has suspended sharing funds with states, including California.

The SEC enacted its new Pay-to-Play Rule to make sure political campaign contributions have no bearing on who receives financial advisory contracts granted by state and local governments. There has been much confusion about how broadly the SEC will interpret the rule, and a number of RIA companies reacted by telling their agents

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## Bronze



to stop contributing to state PACs altogether. Sharing your IFAPAC contribution is in the best interests of you and your clients. Accordingly, it is imperative that you take action to make sure your contribution is shared with NAIFA-California PAC, if your company or broker-dealer permits. **If you are a monthly bank draft contributor, it is imperative that you make your selection immediately, so that your next IFAPAC contribution can be shared with NAIFA-California PAC, if permitted by your company or broker-dealer.**

**ALL NAIFA members must complete the Directive, even if you believe the new Rule does not affect you.**

### Here's what you must do:

1. Contact your company or broker-dealer compliance office(s) to find out if you can contribute to **both** our federal and state PAC.
2. If you can, go to the [Online IFAPAC Directive](#) and - under "please select one of the following options" - check the first box ("Please continue to share my IFAPAC contribution between NAIFA's federal PAC and my NAIFA state association PAC.") Or, complete the [Paper Directive](#) and fax it to 703-770-8151. **Your Member ID is your username and your password is your last name (lowercase).**

IFAPAC provides individual NAIFA members an opportunity to be actively engaged in the political process and is vital to our advocacy efforts at both the federal and state levels. Federal and state legislative and regulatory issues, including threats to the tax status of insurance products, could profoundly impact your clients and the way you do business. Even if you do not plan to contribute to IFAPAC today, you should go ahead and make your selection as soon as possible, so you do not need to worry about the Directive when you are ready to make your contribution.

**Please contact Sandy Henderson, our NAIFA-California PAC Chair, at [shenderson@planfinancial.com](mailto:shenderson@planfinancial.com) if you have any questions.**

## Monthly Legislative



Michael S. McCaffrey, LUTCF  
Government Relations Chair



Shari McHugh  
Legislative Advocate

## Update

### [Legislative Update](#)

**Get Details on Legislative Victories and Current Status of Legislative Bills.**



## Spotlight on Benefits

*Bottom line - NAIFA provides value for your membership!*

### The NAIFA Sales System: The Proven Online Sales Process Designed for Optimum Professional Sales Growth

The NAIFA Sales System is not just another sales tool that makes empty promises. It is not a quick fix. It is designed to encourage sustained behavioral change over the four-month course period and beyond. Course content includes an in-depth presentation of how to build trust and lasting relationships with your clients through a customer-focused sales process that aligns with your goals and personality traits.



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

*"The NAIFA Sales System course has brought me back to the basics, things that for some reason I had stopped doing over the years. Using the process, I realize that in this economy people want more security and protection-provided in the products I offer! My focus is now back on the customers and not the numbers and wouldn't you know, the more I focus on the client, the better my sales. I'm doing what is best for the clients and my enthusiasm is back!"*

**-Lisa Laliberte, NAIFA Member, Lewiston, ME**

For more information, visit [www.regonline.com/naifasalesystem](http://www.regonline.com/naifasalesystem) or contact [Diane Powers](#), NAIFA Vice President for Professional Development and Education at (703) 770-8226; or [Bob Arzt](#), CEO Insurance Coach U at (301) 610-5624.

NAIFA-helps to protect your business, grow your business and save you money!

### 2011 Annual Meeting and Sales Exposition

**Thank you to our generous Exhibitors and Sponsors!**



View a complete [list of our Exhibitors](#), that helped make our Annual Meeting and Sales Exposition a huge success.

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