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# CAL Advisor E-Newsletter

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Insurance and Financial Advisors  
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Newsletter

March 2011

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## 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](#)



## Intentness



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

"Set a realistic goal. Concentrate on its achievement by resisting all temptations and being determined and persistent." This quote comes from John Wooden's pyramid of Success, something that I had a chance to pick up while attending a NAIFA-Fresno fundraiser for Fresno area hunger; a great meeting with a great speaker, Keith Erickson. It was during Mr. Erickson's talk that the importance of the word intentness came through to me. How intent are you on your goals? And, how focused are you on achievement?

I have had the joy of coaching youth sports for 20 years. At the peak of my coaching, I had the pleasure of coaching our local high school softball team to a sectional championship. During those years I would ask my girls to "focus". How many times I have used that word is hard to say, and how redundant a term. But intent is a much clearer word that embodies a far deeper and more inclusive meaning than focus.

For NAIFA-California we are in the midst of resetting our tactical goals for the 2011-2012 year. We had our Long Range Planning Task Force provide us with strategic targets for the next 3-5 years and now we, as your leaders, will need to set tactical goals that can move us toward those strategic objectives. And, to accomplish this we need to be intent on our actions and our time.

For our locals and our state committees, we are coming to the close of the year. Our locals will be submitting the Association Achievement Award forms that catalogue the successes of this past year. They all started with tactical planning sessions and they all moved forward with benchmarks for membership, PIC and PAC, member benefits, and community involvement. Hopefully, we moved forward with a strong intention of succeeding. I look forward to seeing all of you at our state Annual Meeting where we recognize those that were determined and persistent in their objectives. Let us all remember that we still must finish this race before we can begin the new one.

What about you? Have you set realistic goals? Are you intentional in your efforts toward those goals? Early in my career I learned a simple rule of this business; you have to make the calls. Sounds simple, but do you have the discipline to make the calls? The game of numbers was as simple as, 10 calls brought 3 appointments ending in 1 sale. But to make the 10 calls, that is the problem.

One system that I was introduced to was the "warehouse system". You put 10 names on 3x5 cards into a box (I am sure we would use an Excel spreadsheet today) with 6 - 10 different ideas that would be sent to the 10 prospects; one each week for the period of time so desired, but no longer than 10 weeks. No return listing on the envelope, only the idea with a note attached "thought you would be interested" and nothing more. At the end of the 10 notes a call will be made to the 10 folks coming out of the back of the box with a simple question; "of the 10 notes which did you find interesting"? Amazingly enough it would seem that one of the ideas caught the attention of the prospect enough to want to talk further. If you do not have a way of getting in front of 10 people consider trying the "warehouse system".

To implement this system you must be disciplined, which brings me back to the beginning with John Wooden. "Nothing will work unless you do." Be intent!

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

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

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Spring Training has just started and now it's time for Team NAIFA to showcase its new member recruiting skills and take the diamond for the [2011 NAIFA National Membership Drive](#) so "Let's Play Ball!" First pitch is scheduled right now and the 9th inning will conclude at midnight on March 31st.

As an added incentive to grow membership, we will recognize members who recruit at least three new members to Team NAIFA, with the following bonus program:

- Each current **NAIFA member who recruits three to five new members** between Feb. 22, 2011, and March 31, 2011, will receive a check from NAIFA for **\$100** in April 2011.
- Each current **NAIFA member who recruits six or more new members** between Feb. 22, 2011, and March 31, 2011, will receive a check from NAIFA for **\$300** in April 2011.

There's no catch! See Complete Rules at: [www.naifamembershipmonth.com/rules.html](http://www.naifamembershipmonth.com/rules.html)



Jill M. Judd, LUTCF, FSS  
State Membership Chair

### Statewide Leadership Conference Call Wednesday, April 6, 2011



Mark Your Calendars for this very important and informative Statewide Leadership conference call, on **Wednesday, April 6, 2011 at 9:00 am until 10:00 am.**

The call will cover a number of issues concerning our Association, and it will also include an update by NAIFA VP of Securities and State Government Relations Gary Sanders, regarding contributions to IFAPAC and the new SEC "Pay to Play" rule.

I encourage each of you to participate in this important conference call and to watch your e-mail for the agenda that will be sent in advance of the call. Please RSVP by sending an e-mail to [Carol Nicolaysen - Yes I will be on the April 6th Conference Call](#)

Details of the call are below:  
Date: Wednesday, April 6, 2011  
Time: 9:00 am - 10:00 am (60 Minutes)  
Dial: 1 (888) 387-8686  
Then dial: 4432788#  
You must press the pound key after the room number.  
You will hear two audible beeps any time a person enters the conference call.

To Mute or UnMute Your Phone: \*6

### Time To Register!

### 2011 Annual Meeting & Sales Exposition

May 17-18, 2011

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

[Schedule of Events](#)[Registration Form](#)

**Don't miss this exciting event  
[Register Today!](#)**

**Keynote Speakers include:**



**Rosemarie Rossetti, Ph.D.** is a powerful, internationally known speaker, trainer, consultant, writer, and publisher. On June 13, 1998 Rossetti's life was transformed when a 3 1/2 ton tree came crashing down on her. Her life was changed in that instant! Paralyzed from the waist down with a spinal cord injury, Rossetti looked deep within herself and found new strength and new resolve. In her keynote speeches, she shares the lessons she has learned since that fateful day, and demonstrates how to rise above misfortune and live life with conviction. Rossetti's program "Just Like Riding A Bike: Coping with Change and

Dealing with Adversity" is a transformational experience. Rossetti uses the lessons that she learned during her recovery to empower participants. She focuses on what motivates people to change their behavior, awaken their inner gifts, find meaning in their lives, and accomplish more to bring out the best in themselves. As a result of this program, participants will be revitalized and recharged.



**Terry K. Headley, LUTCF, LIC, FSS, NAIFA President,**

entered the insurance business in January 1973 at age 19, and is the youngest Agent ever inducted into the Principal Financial Group's Hall of Fame. He is a Qualifying and Life Member of MDRT and consistent Court of the Table Qualifier. He is the Managing Partner of the Special Market Development Office and President of Headley Financial Group in La Vista, Nebraska. A senior agent and registered representative with the Principal Financial Group for the past 37 years, Mr. Headley formed Headley Financial Group, an affiliate of the Principal, in May 1982. The firm offers: Investment products, Retirement products, Personal and business financial and estate planning, investment advisory services; Individual insurance products and group and employee benefits plans. Mr. Headley and Wynetta, his wife of 40 years, reside in Springfield, Nebraska just outside of Omaha. They have three adult daughters and two grandchildren.



**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 kind in North America, TechAbility, 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.

The NAIFA-California special group room rate  
of **\$139 single** or **\$149 double**  
**is good until Monday, April 25, 2011** -  
make your reservations early!

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

**Room Reservations may be made online at:**

[http://embassysuites.hilton.com/en/es/groups/personalized/L/LAXGDES-NAI-20110516/index.html?WT.mc\\_id=POG](http://embassysuites.hilton.com/en/es/groups/personalized/L/LAXGDES-NAI-20110516/index.html?WT.mc_id=POG)

## Monthly Legislative Update



Michael S.  
McCaffrey, LUTCF  
Government  
Relations Chair

### Monthly 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!*

### Two NEW and FREE Features Added to NAIFA's Virtual Library Main Menu

The Referred Lead Generator (RLG) is a "prospecting engine" that provides names of a current client's neighbors. These names can then be used to begin the referred lead process. The Target Market Generator (TMG) allows you to target all the doctors, lawyers, florists, etc. in a small city or zip code.

*"The NAIFA Virtual Library gives you the ability - at the click of a mouse - to print concept pages on countless numbers of sales concepts. This allows you to quickly prepare a professional presentation that can be used with a client where computer access is unavailable or undesirable. You can use it just one time and immediately pay for your NAIFA membership in multiples."*  
- Kevin Bell, JD, CLU, ChFC, NAIFA Member from Indianapolis, IN.

Visit <http://www.naifa.org/benefits/vsa/> and login as a member to access these two new and free features. For more information, contact Teri Shaw, Marketing Director, Professional Development and Education at [tshaw@naifa.org](mailto:tshaw@naifa.org) or 703-770-8225.



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

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