



CAL Advisor E-Newsletter

National Association of
Insurance and Financial Advisors
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Newsletter

October 2011

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Quick Links...

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Mark Your Calendars!



May 22-23, 2012

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Embassy Suites Monterey
1441 Canyon Del Rey, Seaside, CA
93955
(831) 393-1115



Hotel Room Reservations:
Make your room reservations now by
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Room Rates are \$159.00
Single/Double

**Deadline for Group Room Rate is
Monday, April 20, 2012**

**Alert: Act Now to Protect
Your IFAPAC Contributions!**

President's Message



Michael K.
Fiamingo, LUTCF
(Mike)
NAIFA-California
President

Last month, the NAIFA Annual Meeting and Career Conference, was held in Washington, DC from 9/10-14/11. It was a great meeting with the magic of Washington, D.C. and all of its history and wonderful monuments. There were great speakers such as: Jim McCormick speaking on exceeding terminal velocity- excelling in any setting; Chief Richard Picciotto, FDNY, Last Man Down - A Fireman's Story from the World Trade Center attack; and keynote speaker General Colin Powell USA Ret. (Leadership - taking charge) presenting an interesting, provocative, and sometimes light hearted speech. A host of platform speakers including: Van Mueller (30 days to the career of your dreams), David Appel (referrals the easy way), Eileen Tell (the class act and long-term care-update and implications for the private market) and General Colin Powell USA Ret. (Leadership - taking charge) presented a more thorough leadership message at the LILI 7 workshop.

This year's recipient of the John Newton Russell Memorial Award was Marvin Feldman, President and CEO of the Life and Health Insurance Foundation for Education (LIFE). Feldman has been a leading voice in educating the public on the importance of life and health insurance, and emphasized the critical role of the insurance agent in the delivery of products to the consumer. Marv is recognized as an ambassador for our industry and has played a vital role in protecting and advancing the financial security of American families through his dedication to the institution of life insurance. Congratulations to Marvin Feldman and his contribution to our industry.

The highlight of the conference was the nighttime custom tour of over 10 monument locations narrated by our resident history buff, David Dellinger Executive Vice President-NAIFA California. The historical information and sights kept the 54-bus passengers spell bound for our 5 1/2 hours narration and walking tour of these historic monuments of the history of our country. To make the evening complete, each person on the tour received a bound booklet of the tour with a brochure of the Declaration of Independence and the Constitution of the United States. This memento of the tour gave us details of our forefathers that most people are not aware of. Our thanks to David for his attention to detail and sharing so much of the history he knows about our country's heritage. This took many hours of time and effort, and we greatly appreciated it. Even the bus driver said it was by far the best tour that he had witnessed in his fifteen years of driving tours around the District. Thank you, David, for the tour through our U.S. history.



IMPORTANT NOTE: *If you do not fill out a member directive, your entire contribution will be kept in NAIFA's federal PAC and this could seriously impact our ability on the state level protect your interests.*

After you have consulted with your compliance department, please reply by printing out the attached [IFAPAC Contribution Directive form](#), fill it in, and sign, and fax back to NAIFA-California at (916) 646-8130.

Or complete the form online by [CLICKING HERE](#). You will need your NAIFA Member ID to log on and your password is your last name in lowercase.

If you have any questions, please contact Sandy Henderson, State IFAPAC Chair at shenderson@planfinancial.com.

Thank you for being a NAIFA-California member and supporting our political action committee and advocacy efforts!



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](#)

Our Sponsors

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

Platinum



Transamerica Life Insurance Company
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All of our Locals have just held their first meetings of the new fiscal year. Let's reach out to our colleagues who are not members and invite them to attend a meeting and join NAIFA for the advocacy, member benefits, and training available regardless of the time or experience in the business. And speaking of training, we now have the NAIFA On-line Leadership Academy with six modules as a training tool for individuals who may wish to take a leadership role in their Local or State Board.

I wish everyone a successful year as we start our fall meetings and prepare for the upcoming holiday season.

Michael K. Fleming

Monthly Legislative Update



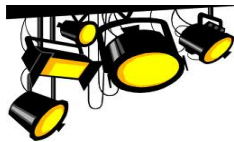
Michael S. McCaffrey, LUTCF
 Government Relations Chair

Get Details on Legislative Victories and Current Status of Legislative Bills

[Legislative Report](#)



Shari McHugh
 Legislative Advocate



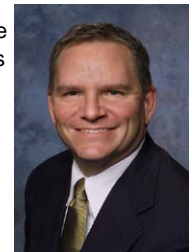
Spotlight on Benefits

Bottom line - NAIFA provides value for your membership!

Grow Your Business With a Customized Website Designed by Smarsh Financial Visions

In today's world, you need a professional presence on the web in order to grow your business and serve your clients effectively and proficiently. Smarsh provides the most comprehensive, affordable website service available to the insurance and financial services industry. Managing your site is easy and fast - no outside designers or developers are needed. Select from more than 50 templates with articles, financial calculators, newsletters, reports and quotes - everything you need to present your professional services and qualifications 24 hours a day, 7 days a week. All securities related articles have been FINRA reviewed.

"We changed broker dealers and knew we would need to make a website change because of that. Smarsh (Financial Visions Websites) offered us more benefits and were more in tune to what our industry is all about. I was impressed by that plus the options they already had in place that I knew would be compliance approved. - Larry Lee, CLU, ChFC, NAIFA Member, California



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



Gold



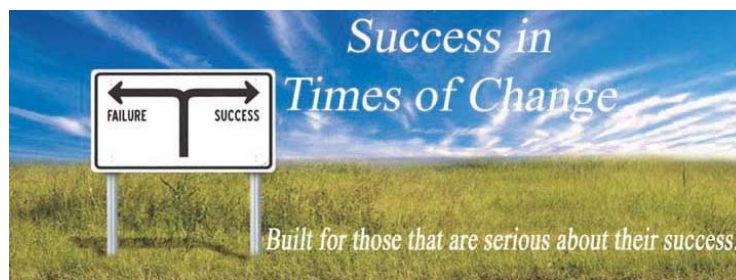
Bronze



What is the cost? As a NAIFA Member, you pay \$39.95 a month - a savings of \$5.00 per month - with an initial set-up fee of \$99.00 - a savings of \$50 off the regular set-up fee.

Is there a product demo? To see how easy it is to provide a wealth of information and services to your clients and prospects through your own personalized website, take the Financial Visions 5-minute demo tour. <http://www.naifawebsites.net/Index.aspx?PageID=294&N=Take%20a%20Tour>

For more information, visit www.naifawebsites.net/ call 800-593-9228. When calling, be certain to identify yourself as a NAIFA member.



Registration is open for Success in Times of Change, a 15 week professional development/sales training series which begins October 27th, 2011.

Success in Times of Change, is especially designed for members like you who want to be their best, and take their professional and their personal development seriously. And, if you are interested in increasing your production, cultivating new and growing existing clients and creating greater profit, then this program is perfect for you.

[Click here](#) to view a short (1 minute), video featuring our facilitator, award winning change agent and business leader, Ian Hill describes the series and how we have leveraged technology to make it both affordable and easy to access 24/7 where and when you have time.



Ian Hill

[Register Today](#)

[Session Descriptions and Learning Outcomes](#)

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Our Mission:

To advocate for a positive legislative and regulatory environment, enhance business and professional skills, and promote the ethical conduct of our members.

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