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National Association of Insurance and Financial Advisors - Jacksonville

MAY 2011



*Gaining members to have our voices heard  
in Tallahassee and Washington.*

## Jax Advisors Online

NAIFA-Jacksonville Membership Newsletter

### Official Family

Click [HERE](#) for NAIFA-Jacksonville's Officers and Directors.

Find us on Facebook 

**Special 3-Hour Morning  
C.E. Seminar prior to our  
Annual Meeting and  
Membership  
Luncheon!**

### Message From the President



**Christopher E. Veenstra**

My Fellow Colleagues,

The sun is setting on our 2010-2011 year. In June, we will be hosting our Annual Meeting as a luncheon on June 22nd at the University Club. During this time, we will be reviewing and asking your approval of some proposed bylaw changes and installing our 2011-2012 Officers and Board Members. I want to thank our officers and board members that will be committing time and talents to serve NAIFA next year. Our local association board members carry a tremendous amount of responsibility. With their efforts and the efforts of their committee volunteers, I would expect nothing but the best for the upcoming year. If you are not on the ballot, the next best way to serve is to join a committee. We have multiple committees appealing to a variety of interests.

May is also Disability Insurance Awareness Month. I want to encourage everyone to promote Disability in your practice. As an agent, you know the significant financial consequences that Americans face when they are not properly covered for disability insurance. For more information on disability insurance awareness month, you can visit the Life Foundation at [www.lifehappens.org](http://www.lifehappens.org).

In order for our local association to be the best that it can be, we must grow. We are currently behind for our annual membership goals and your support is greatly needed. If you know someone who is not a member and should be, call our association office with contact information so we can help him or her join. If you know of an organization with non-members and you think an agency presentation would be beneficial you can also contact our association office at **(904) 695-2300**.

This month has been set aside to commemorate the many men and

**WEDNESDAY  
JUNE 22, 2011**

**The University Club**  
1301 Riverplace Blvd.  
27th Floor  
Jacksonville, FL 32207  
[DIRECTIONS](#)

**8:30 - 11:30 AM**

**"Meeting the Standard:  
Ethics and Suitability  
for Seniors"**

3-HOUR FLORIDA DFS-APPROVED  
SENIOR SUITABILITY CONTINUING  
EDUCATION CLASS PRESENTED  
BY NAIFA-FLORIDA



This course is designed to bring greater awareness to agents concerning issues with suitability requirements. The course discusses definitions, information collection requirements, education requirements, penalties and unauthorized entities. The course also introduces a number of case scenarios for group discussion.

[CLICK HERE FOR COMPLETE  
DETAILS AND REGISTRATION!](#)

women who gave their lives in the armed forces. Without their ultimate sacrifice, we would not have the freedom to sing "God Bless America", to pledge allegiance to the flag, or any of the other freedoms we enjoy because of their love for the USA. I hope that you would join me wherever you are on Memorial Day to remember the great men and women of yesterday, as well as the current men and women who labor for our country, while we continue to enjoy life safely at home.

## NAIFA-Jacksonville Annual Meeting and Membership Luncheon

**Wednesday, June 22, 2011 | 11:30 AM - 1:00 PM**

**The University Club, 1301 Riverplace Blvd., 27th Floor, Jacksonville, FL 32207**

### **"Rebooting Leadership: Survival Skills for Managers in the New World"**

Guest Speaker: **Richard Hadden, CSP**



Just as Ctrl-Alt-Delete is often the only remedy for a computer in chaos, many managers in business today need a good "reboot", to put their leadership practices back on a solid footing. While the fundamentals of leadership have not changed, the way we practice them must reflect today's new realities - a world in which folks are wrapped too tight, trust is at an all-time low, and the "deal" in the workplace has been turned on its head forever.

Richard Hadden is a Certified Speaking Professional with a focus on Creating a Great Place to Work. He is co-author of *Contented Cows Give Better Milk*, *Contented Cows MOOve Faster*, and his latest work, *Rebooting Leadership: Practical Lessons for Frontline Leaders (and their Bosses) in the New World*.

Richard is a ninth-generation Floridian, and a graduate of Jacksonville University. He has an MBA from the University of North Florida.

A former Information Technology Manager, Richard has, since 1990, spoken and conducted leadership training for more than 1000 audiences throughout North and South America, Asia, Australia, and Europe. He has appeared on CNN and MSNBC, and his work has been featured in *The Wall Street Journal*, *Business Week*, and *Inc. Magazine*. He is also a regular contributor to *Workforce Management Magazine*.

**COST: \$20.00**

**Members who RSVP by 12:00 noon on June 20th, the cost is only \$15.00!**

Click [HERE](#) to register for NAIFA-Jacksonville's June 22nd Annual Meeting and Membership Luncheon Online!

**Our Annual Meeting will also feature a membership vote  
on NAIFA-Jacksonville's proposed Bylaw Changes.**

Click [HERE](#) for the proposed changes to our Bylaws.

**We will also hold the Election and Installation of our  
2011-2012 Officers and Board of Directors:**

PRESIDENT: **William "Gene" Bryant**  
FIRST VICE PRESIDENT: **Roger Dominey, CLU®, ChFC®, CFP®**  
SECRETARY/TREASURER: OPEN  
IMMEDIATE PAST PRESIDENT: **Chris Veenstra**  
NATIONAL COMMITTEEPERSON: **Maureen Kirschhofer, CLU®, ChFC®**  
ASSOCIATION EXECUTIVE: **Cherri Coombs Ohmer, LUTCF**



**DIRECTORS:**

**Jayme Alfano, CLTC®, CLU®**

**Alicia Burst\***

**Cindi Cook\***

**Cheryl Canzanella**

**Margie Harner\***

**Charles "Bob" Mitchell, LUTCF**

**Van Mullinax, LUTCF\***

**Lesa Steinberg\***

\*Indicates incumbent board member

**ARTICLE VIII - NOMINATIONS AND ELECTIONS**

*Section 3. The Committee on Governance shall prepare an election ballot containing the names of the Committee's nominees for officer and director positions. Nominees selected by the Committee shall be published in the association newsletter or special bulletin and distributed to all Active and Associate members of this Association at least one month prior to the annual meeting. In addition, nominations from the floor may be presented at the annual meeting, provided that written notice stating the name of the person to be nominated shall have been received by the Secretary of this Association at least fourteen (14) days prior to the annual meeting.*

For more information, contact Association Executive Cherri Coombs-Ohmer, LUTCF at (904) 695-2300 or [info@naifa-jacksonville.org](mailto:info@naifa-jacksonville.org).

**NAIFA-Jacksonville appoints Maureen Kirschhofer, CLU, ChFC as National Committeeperson**

**Maureen is no stranger to NAIFA or the industry. We are proud that she has accepted the role National Committeeperson. Welcome back Maureen!**



Maureen began her working career as an Art Teacher in Buffalo, New York after completing her BFA at the University of Rochester and her MS in Art Education at the State University College at Buffalo. She began her insurance career as an agent for the Paul Revere Company there in November of 1981. Became a NAIFA member in 1983 and she was selected as the Rookie of the Year by the Buffalo ALU, (now NAIFA Buffalo). There she served as Health Committee Chairman until her move to the Jacksonville area in 1985.

On a local level she moved through the chairs of the Jacksonville Association of Life Underwriters (NAIFA Jacksonville) and as Membership Chairperson had the largest membership in Florida in 1989, also placing second on a national level. As President, the organization achieved the 5 Star award; the first one ever received in Florida. In 1998 she was awarded the CG Snead/JF Bryan, III Memorial Award for Outstanding Service in Jacksonville.

On the State Level she became the Regional Vice President (FALU) and was the State Political Action Chair for two terms. A Chartered Life Underwriter, Pace Qualifier since 1990, Maureen has served as President of the Jacksonville Society of Financial Planners and GAMA president. On a national level she has been a speaker at the NAIFA convention in the past and her Life Story was published in the NAIFA Advisor magazine in August 2010. She is currently First Vice-President of the International Disability Society.

Her principal focus has been the protection and growth of assets through the use of Life, Health, Disability and Long Term Care products. She focuses on Professionals and Business owners needs.

She and her husband, Bill live in Jacksonville with their two Labs and have a son, Todd in Rhode Island. On a community level she is on the Guild Board of the Jacksonville Symphony, on the board of Governors at the University Club, taught a course in American Architecture and Studio Painting at the Osler Lifelong Learning Institute at University of N. Florida, and is on the board of the First Coast Newcomers. In her spare time, she loves to garden, paint, play piano and read.

**Responsibilities of the National Committeeperson:**

*The National Committeeperson serves as a liaison between the association and the National*

Association of Insurance and Financial Advisors. He or she reports on matters arising from and referred to the National Council, the NAIFA Board of Trustees, and NAIFA standing committees to the state association. The National Committeeperson is vital in the communications and management that binds the NAIFA federation together. The position requires an experienced association leader who is willing and able to contribute time and effort to the association over a three-year term. As an experienced leader, the local National Committeeperson is often called on to conduct the association new member orientation program and the association strategic planning process.

The National Committeeperson serves as an Executive Officer, and is asked to attend the state and national conventions annually.

## NAIFA-JACKSONVILLE'S 40-HOUR PRELICENSING COURSE

Available Live and Online! Click [HERE](#) for complete details!



### 2011 COURSE DATES:

MAY 13-16, JUNE 10-13, JULY 8-11, AUGUST 12-15, SEPTEMBER 9-12, OCTOBER 7-10, NOVEMBER 11-14, DECEMBER 9-12

Approved by the Dept. of Fin. Svcs. / Course ID 38274. Check our [website](#) for more information.

## Seven Simple Questions for a Great Employee Conversation

By Richard Hadden, CSP

If you lead others at work, there are few activities more valuable for you, and for those you lead, than an occasional face-to-face sit-down conversation, just to check in. No specific agenda. Lots of managers tell me they agree, but they're often at a loss as to what to say - even how to get started.



Call it a coaching session, a midcourse checkup, or whatever you like. Here are seven questions that you - and your followers - will find helpful to move the conversation along:

1. How do you think you're doing in your job?
2. What one thing do you think you could do better?
3. What help do you need to do that?
4. What one thing could others you work with do better?
5. What one thing do you like most about working here?
6. What one thing do you like least about working here?
7. If you were me, what one thing would you do differently?

The list starts with the sublimely simple, and progresses through questions that take a little more courage for others to answer. And perhaps for you to hear.

If you're going to use these questions as a basis for the discussion, here are some tips on making the conversation as productive as possible:

- Be prepared to be nowhere else but right there, with the person you're talking with. Shut off the cell phone, don't answer the landline, close your email client. Clear the decks. Clear your head.
- You'll notice that five of the seven questions say "What one thing". Stick to that limit. Otherwise, you'll likely be there all day. If there are other issues that need attention, schedule a time to explore them. For this discussion, enforce the limit of one thing.
- Listen, listen, listen. You're in input mode here, not output. Remember why we were all issued, at birth, one mouth, and two ears.
- Underpromise, and overdeliver. Make it clear that this conversation is to get your input, not to promise immediate changes. Question 7, in particular, could lead others to think that you'll implement all of their specific recommendations. Be honest. Unless that's your intention, sincerely thank them for their input, and then weigh it up with the other feedback you get. But - and this is a big but - if you're seen to ignore everything you hear, you'll shut down the flow, and quickly. When your followers see positive changes, based on their input, your credibility,

and effectiveness as a real leader, will take off.

Finally, have fun with this. This conversation should be seen as a good one. Anything but a chewing out. They'll be taking some risks if they're completely honest with you. Play with that a little. Thank them for it. And then, act.

*Richard Hadden, co-author of the new book, Rebooting Leadership, is a Jacksonville-based author and speaker, who focuses on connecting people and profits. He will be the speaker at the NAIFA-Jacksonville Annual Meeting on June 22, 2011.*

## NAIFA-Florida Career Advancement Conference and Expo, Exceptional Learning 2011

### Attention Potential Sponsors and Exhibitors!

The National Association of Insurance and Financial Advisors-Florida (NAIFA-Florida) 79th Annual Career Advancement Conference and Expo, "Learning in Luxury," takes place **July 18-20, 2011**, at the Four Seasons Resort, Palm Beach, Florida.



Get ready to experience the premiere opportunity to get your message and business before the foremost association of life, health, financial and multiline agents and advisors in Florida. Enjoy the spectacular locale of, the world famous, Four Seasons Resort in Palm Beach. The ultimate business and resort destination framed by sun and sea!

### Reserve your Sponsorship Package or Book Your Exhibit Booth Now!

To download and print a complete Sponsorship-Exhibitor Prospectus, [CLICK HERE](#).

To register online, [CLICK HERE](#).

For further information, please contact Lolita Brawner at **(850) 422-1701**.

## Connections That Count!

**Don't Lose Us in Your Spam Filter!** Please add [info@NAIFA-Jacksonville.org](mailto:info@NAIFA-Jacksonville.org) or [Cherri@NAIFA-Jacksonville.org](mailto:Cherri@NAIFA-Jacksonville.org) to your e-mail "Contacts" list and update your spam filters to allow us to deliver the latest NAIFA-Jacksonville news and events! For more information, contact the Association office at **(904) 695-2300**.

### Please keep us up to date with your contact information!

To update your membership information with NAIFA, click [HERE](#).

Find us on Facebook 

For the latest NAIFA-Jacksonville news and events, please visit our website at [www.naifa-jacksonville.org](http://www.naifa-jacksonville.org), or contact Association Executive Cherri Coombs-Ohmer, LUTCF at **(904) 695-2300** or email [info@naifa-jacksonville.org](mailto:info@naifa-jacksonville.org).



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