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National Association of Insurance and Financial Advisors - Jacksonville

JANUARY 2012



*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

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MARK YOUR CALENDARS!

Visit the [Event Calendar](#)
page on our website for the
latest updates!



Message From the President



Gene Bryant
NAIFA-Jacksonville President

Another year is here. Let's make this one of our best and most prosperous years ever!

Come to the NAIFA-Jacksonville 40th Annual Awards Luncheon on January 25th... put that on your to-do list. Our lists usually comprise of either the things we don't want to forget (pay the JEA bill), or the things we want to remember ([send membership renewal payment to NAIFA-Jacksonville](#)). We choose, according to our interests, to word things differently, such as don't forget to go to the office today for our staff meeting... versus remember to [register and send payment for the January 25 NAIFA-Jacksonville Meeting](#).

When our family or livelihood demands, we jump through hoops to accomplish goals. Don't forget to send Disney a check prior to Friday to receive the discount, reserve our room and get tickets this Spring. It can be worded, remember to [reserve and confirm our trip prior to January 12 \(for discount price\) for Day On The Hill, Tallahassee, FL, January 30](#). Plan to [meet and discuss things with Representatives](#) that support my paychecks. One can say don't forget to call Alhambra for season family tickets, with dinner... Patsy Cline will be back. Or, remember to invite someone in my business to a NAIFA-Jacksonville Meeting for [lunch and Continuing Education credits](#). How many people go to the University Club? Many of us feel better about ourselves when we do something to help others. Don't forget to call and make sure "Mr. T" has chicken soup while out with a cold. And, remember to help Margie [call a few people](#) that I know are on the lapsed list. I can probably [persuade or encourage them to renew their membership](#), just because several are my co-workers, others are friends. This is worth repeating: **[Come to the January 25 meeting. You will be glad you did!](#)**

JAN. 25, 2012

Membership Luncheon and Annual Awards Presentation
Announcing the 2011 C.G. Snead/J.F. Bryan, III Memorial Award and the 2011 Community Service Award recipients, plus Recognition of NAIFA Quality Award Recipients and the Manager's Membership Award
CLICK [HERE](#) TO REGISTER ONLINE!

JAN. 26, 2012

YAT Educational Workshop and Breakfast
Sponsored by ExamOne
"Estate Planning & Buy/Sell Agreements"
8:00 a.m. - 9:30 a.m.
CLICK [HERE](#) FOR COMPLETE DETAILS!

JAN. 30, 2012

NAIFA-Florida Day on the Hill
Tallahassee, FL
CLICK [HERE](#) FOR COMPLETE DETAILS!

FEB. 22, 2012

Membership Luncheon
Legislative & Florida Regulatory Update
(includes 1 hour CE)

MARCH 28, 2012

Membership Luncheon
Guest Speaker:
Joanne Wilburne
(includes 1 hour CE)

APRIL 25, 2012

Membership Luncheon

When it comes to political advocacy and protecting the interests of its members, NAIFA is one of the best in the business. Our talented and experienced staff and volunteers engage decision makers at every level of the legislative and regulatory system. NAIFA's government affairs staff monitors federal legislation and mobilizes resources to achieve the most favorable outcome for members and their clients. The constituent and staff lobbying effort is strengthened by both our industry-leading political action committee, known as the [Insurance and Financial Advisors Political Action Committee](#) (IFAPAC), and the [Advisors Political Involvement Committee](#) (APIC), our grassroots network of members (includes you) have developed relationships with virtually every member of Congress.

At the state level, our state associations work hand in hand with NAIFA's national law department to positively impact state legislation and regulation. They develop lobbying strategies, comment on key issues, implement uniform policies and participate in litigation. Our many successes have hinged on NAIFA's favorable relationships with the National Association of Insurance Commissioners (NAIC), the National Conference of Insurance Legislators (NCOIL), the National Conference of State Legislatures (NCSL), and the National Conference of Commissioners on Uniform State Laws (NCCUSL).

NAIFA, we were there in the beginning, we are there now and will continue to protect our members' paychecks. Please consider becoming actively involved in our advocacy effort.

Sincerely,

Gene Bryant
President, NAIFA-Jacksonville

*Celebrating Disability Insurance
Awareness Month*

Guest Speaker: Greg Mazzi
(includes 1 hour CE)

MAY 23, 2012
Membership Luncheon
and Annual Meeting

JUNE 27, 2012
Membership Luncheon
and Installation of our
2012-2013 Officers and
Board of Directors

NAIFA-Jacksonville's Annual Awards Luncheon!

Wednesday, January 25, 2012

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

Please join your fellow NAIFA members to celebrate their success during our Annual Awards Luncheon Program, featuring:

The Presentation of the
2011 C.G. Snead/J.F. Bryan III Memorial Award

The Presentation of the
2011 Community Service Award

Recognition of our
NAIFA Quality Awards Recipients

The Presentation of the
Manager's Membership Award

Recognition of
NAIFA-Jacksonville Past Presidents

Registration: 11:15 am

Buffet Lunch: 11:30 am

Awards Program: 12:00 - 1:00 pm

COST: \$25.00, members who RSVP by Friday, January 20 pay only \$20.



Please register and pay online by clicking [HERE](#). Reminder: credit cards are not accepted on site, only via registration online. For additional questions regarding this event please contact Association Executive Cherri Coombs-Ohmer, LUTCF at **904-695-2300** or Email info@NAIFA-Jacksonville.org.

Congratulations to our 2011 NAIFA Quality Awards Recipients!

[CLICK HERE FOR A COMPLETE LIST!](#)

YAT Educational Workshop

Thursday, January 26, 2012 | 8:00 a.m. - 9:30 a.m.

10151 Deerwood Park Blvd., Building 100, Suite 300, Jacksonville, FL 32256

NO REGISTRATION FEE! BREAKFAST PROVIDED!

If you are 40 years of age or younger OR if you are in the industry five years or less or you just feel like a YAT - then this meeting is designed for you!



"Estate Planning & Buy/Sell Agreements"

Special presentation by guest speakers **Bo Trudeau** and **Brian Hershorin** with Purcell, Flanagan, Hay and Green, PA.

CLICK [HERE](#) FOR COMPLETE DETAILS!

NAIFA-Florida Day on the Hill Early This Year!



**We NEED YOU in Tallahassee,
NOW more than EVER!**
January 30 & 31, 2012
**NAIFA-Florida protects your career
before the Legislature.**
**OUR voices must be heard . . .
and WE can't do it without YOU.**

The graphic features a black and white photograph of the Florida State Capitol building on the left. To the right of the photo is a large, bold text overlay in red and black. The text reads: 'We NEED YOU in Tallahassee, NOW more than EVER! January 30 & 31, 2012 NAIFA-Florida protects your career before the Legislature. OUR voices must be heard . . . and WE can't do it without YOU.'

Every ten years the Florida Legislature re-draws the district lines for the House, Senate, and congressional districts. As you can imagine, this is a highly politically charged endeavor, and one that lobbyists stay as far away from as possible. Part of the process involves moving the legislative calendar and starting the session two months earlier. The 2012 session runs through January and February, instead of starting in March. That also means that this fall, the Florida Legislature is taking up bills and moving with a brisk pace...much like what happens in an average year beginning in January. Every other week the legislature is in Tallahassee, they are taking up bills, holding budget hearings, and moving forward on a host of issues.

Due to reapportionment, the NAIFA Day on the Hill in Tallahassee will be held on January 30, 2012. That date puts the meeting squarely in the middle of the early session this year, and gives NAIFA Florida members the optimum opportunity to affect the outcome of important legislative issues occurring during the 2012 session.

Recruit 4 new members and NAIFA Jacksonville will pay your \$95

registration feel. Hurry-Earlybird registration ends Thursday, January 12th. Please mark your calendars now, we need you to attend!

For complete details and registration form, please click [HERE](#).

YAT Road Trip to Day on the Hill!

Join other YATs for a ROAD TRIP as we represent NAIFA-Jacksonville on Monday & Tuesday, January 30th & 31st to attend NAIFA-Florida's Legislative Day on the Hill in Tallahassee. Meet influential people in our industry, make new friends, discover new business opportunities and expand your business prospects and contacts.



Legislative Day on the Hill is your opportunity to participate first-hand in the political process. Not only will you have the opportunity to see dozens of our lawmakers and regulators at work, but you will also have the opportunity to mingle with them to underscore the importance of insurance and financial services professionals in the marketing and sales of insurance and financial products.

This is a chance for your voice to be heard! Whether at the Capitol in Tallahassee or on Capitol Hill in Washington, NAIFA works tirelessly to protect the careers and business environment of our members! Legislative and regulatory advocacy is one of the most important benefits NAIFA offers its members. There is strength in numbers and our numbers are heard clearly in Tallahassee by members of the House of Representatives, the Senate, the Governor's office, and the Department of Financial Services.

For more information or to become a member, contact Cheryl Canzanella, YAT Chair, at **904-924-6375** or ccanzanella@jacksonville.nef.com.

For more information on the benefits and programs offered to NAIFA's YAT members, please visit www.naifa.org/benefits/yat.

NAIC REQUIRED 4-HOUR LTC CE!

**Presented by the
Jacksonville Association of Health Underwriters & NAIFA Jacksonville**



If you sell or want to sell Long Term Care Insurance and if you missed the recent NAIFA-Jacksonville presentation of the NAIC four-hour LTC CE that was held this past October, you now have the another opportunity to take this CE!

Wednesday, February 29, 2012 (Leap Year Day)

Deercreek Country Club | 8:30 am - 12:30 pm

COURSE NO. 78593, COURSE OFFERING ID NO. 939770.

Cost and Registration details will be available shortly.

NAIFA-JACKSONVILLE MEMBERS WILL BE OFFERED THE SAME COST AS JAHU MEMBERS.

Looking Ahead to 2012

**A Message from NAIFA National
President Robert A. Miller, M.S., M.A.**



Hello NAIFA, and welcome to 2012. I hope you're ready for an exciting and successful year with your professional association.

This year will mark NAIFA's 122nd birthday - that's 122 years of protecting our members' interests in Washington and in every state capital! That's 122 years of protecting the way you do business under a commission-based model. And that's 122 years of telling our members' stories to ensure that key decision leaders understand the important ways you strengthen our economy and protect American

families and businesses.

I like to think we're not just 122 years old, but we're 122 years strong. Each new year adds to NAIFA's prestige, influence and value to its members.

But over the course of 12 decades, change is inevitable, and NAIFA has always been committed to ensuring our federation continues to lead our industry and help our members in new and dynamic ways. I believe that NAIFA must tackle three critical inter-related issues to keep our association moving forward: modernize our governance model; revitalize our membership activities; and re-message our value proposition. Each of these areas depends on the others and only together will they work to bring NAIFA to the next level of success in leading our industry and serving our members.

That's why the NAIFA Presidential Blue Ribbon Task Force is examining NAIFA's governance structure to make certain that the way we operate is up-to-date and as effective as possible in achieving the NAIFA mission. Ensuring efficient governance of NAIFA will guarantee that the federation best serves our members and remains strong and vital into the future. The Task Force has an extremely important mission for 2012, and I will continue my commitment to regularly report on Task Force activities on the NAIFA web site. Look for further updates after our next conference call scheduled for January 17.

But improving NAIFA's governance model is only one component of the three inter-related initiatives already underway to strengthen your association. Just as important, energizing NAIFA membership is a major priority for 2012. We have bolstered the efforts of our National Membership Committee by focusing their energy on their home states to help build membership; NAIFA-National is providing robust strategic guidance and support to federation leaders on how to re-energize and refocus their membership efforts in the coming years. This fall, we launched the incentive campaign - which literally will pay off when each association grows, and NAIFA has provided leaders with valuable resources on the membership portion of our web site, including: the NAIFA Online Service Center, NAIFA Online Leadership Academy, Online Leaders Training Center, and NAIFA Membernet. Finally, under the direction of Dr. Waters, the NAIFA-National staff personally reach out to thousands of members by participating in monthly staff membership phone-a-thons. And in addition, of course, NAIFA is forging ahead in developing membership programs with numerous insurance companies and is making strides in efforts to attract the independent market.

Changing how we structure our federation and how we recruit and retain members are two core components of keeping NAIFA strong. But a third and equally critical component is how we message the value of NAIFA. We will re-message NAIFA in ways that are more compelling and relevant to today's members and prospective members. A NAIFA re-messaging campaign currently under development carries a simple and true message - that NAIFA members make more money. The success of this campaign will depend largely on the support, participation and engagement from you and your fellow members and leaders. Stay tuned for more on this important initiative.

Taken together, our aggressive efforts on three fronts - governance, membership, and messaging - form a coordinated strategy to ensure NAIFA's indispensable role in protecting our industry and helping members like you grow their business and protect the financial security of the American public.

Thank you all for supporting NAIFA. I am honored to serve as your president.

*Robert A. Miller, M.S., M.A.
2011-2012 NAIFA President*

NAIFA-JACKSONVILLE'S 40-HOUR PRELICENSING COURSE

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

COURSE DATES IN 2012!

January 20-23, February 24-27, March 23-25, April 27-30, May 18-21, June 22-25,
July 20-23, August 17-20, September 21-24, October 19-22, November 16-19, December 14-17

NEW LOCATION:



Employ Florida Banner Center for Financial & Professional Services
University of North Florida, 12000 Alumni Drive, Jacksonville, FL 32224

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

The realLIFEstories Client Service Awards Program

The nonprofit LIFE Foundation announced that it is once again sponsoring the realLIFEstories Client Service Awards Program, an annual effort to collect and publicize compelling examples of how insurance helped saved the day for families and businesses at times of great financial need.



LIFE is now accepting submissions; and agents have until January 17, 2012, to share their life, disability or long-term care insurance success stories. The four best stories, as determined by an independent judging panel, will be featured in a special advertising section in a Fall 2012 issue of "O" magazine. To enter, insurance agents must complete an application form, along with an essay describing their client's realLIFEstory. Agents can either complete the form and essay online, or download the application and mail or fax it to LIFE. The deadline to submit an entry is January 17, 2012.

Complete details and application form is available by clicking [HERE](#).

The NAIFA Coaching Program

NAIFA has partnered with a select group of experienced, industry-focused coaches to provide NAIFA members access to products and programs created by this coach community to further enhance your growth and success, as well as opportunities for individual and group coaching at special member rates.



The Benefits of Coaching

- Dramatically impact your sales and practice management performance
- Stay focused on your goals
- Group and individual coaching experiences accelerate success
- Increase your determination and confidence
- Evaluation and review of current marketing plan helps determine current state of your business
- Take your business to the next level using new, powerful marketing strategies
- Learn valuable practice development models and methods that will appeal to all agents and advisors, at any career level
- Understand how to engage more meaningfully with prospective clients, current clients, staff, and others
- Access to free online tools and resources, and special member discounts on popular, best-selling books

The NAIFA Coaches, **Bob Arzt**, **Stan Hustad** and **Norm Trainor**, offer NAIFA Members coaching and training support on the topics of sales, marketing and practice development.

For more information and pricing packages, visit www.naifa.org/benefits/networks/naifacoach.cfm or contact Teri Shaw, Director of Marketing, Professional Development and Education at **703-770-8225** or tshaw@naifa.org.

Online CE from NAIFA-Florida and WebCE

NAIFA-Florida is pleased to be in partnership with WebCE, a leading provider of insurance continuing education services. Through this new partnership, NAIFA-





Florida members are eligible for a 10% discount on fees to purchase top-notch online continuing education for insurance professionals.

WebCE's insurance CE programs are designed to allow members to choose specific topics and courses to fulfill their specific needs. WebCE courses cover beginning, intermediate, and advanced training levels, and members can choose either print correspondence courses or online correspondence courses.

Visit faifa.webce.com to enter the NAIFA-FL WebCE web page. The first time you visit the site you will need to obtain a username and password by clicking on "Sign In" on the left hand side of the main page, then clicking on the "First Time Registration" link. Once you've set up your account you're ready to go!

For more information, contact Paul S. Brawner of NAIFA-Florida at **(850) 422-1701** or brawner@faifa.org.

Connections That Count!



Don't Lose Us in Your Spam Filter! Please add info@NAIFA-Jacksonville.org or 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](#).

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



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