



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

Jax Advisors Online

NAIFA-Jacksonville Membership Newsletter

Official Family

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Message From the President

Gene Bryant NAIFA-Jacksonville President



When I first joined the NAIFA-Jacksonville Board of Directors 5 years ago, I really had no idea of the importance of this great association. It was then that I became aware of the fact that continuing education for members of our profession was one of the functions of the association. As I chaired various other committees, it became apparent to me that NAIFA serves many purposes and functions as a result of the hard work of the many members involved.

One NAIFA purpose made an indelible impression upon me. The function of legislative advocate for our members and our clients is the most important benefit to members of the entire profession. The political environment has become more challenging each year and NAIFA-Jacksonville and the rest of the Federation has continued to rise to these challenges.

NAIFA-Jacksonville will continue only by continuing to grow with new members, new ideas, and hard work. Our state convention in July and our national convention in September will help us develop the tools to continue our association for years to come. If you have not made your reservations to attend these two learning opportunities, I strongly encourage you to do so quickly. See our website at www.naifa-jacksonville.org for details. In addition to the learning opportunity, we need you as a voting delegate to assure our local issues are addressed by the state and national leadership.

MARK YOUR CALENDARS!

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



JUNE 27, 2012

Membership Luncheon
Featuring the Installation of
our 2012-2013 Officers and
Board of Directors
GUEST SPEAKER:
Pat McManamon
[CLICK HERE TO REGISTER ONLINE!](#)

JULY 16-18, 2012

NAIFA-Florida 2012 Career
Advancement Conference and Expo
"Exceptional Learning 2012"
Hyatt Regency Grand Cypress,
Orlando, FL
[CLICK HERE FOR COMPLETE DETAILS AND REGISTRATION!](#)



I have had the distinct honor and privilege to serve as your president the past year. This position impressed upon me the importance of the hard work that all the board and committee members put forth on a day to day basis. My deep appreciation and heartfelt thanks are extended to them and our Association Executive. I am excited about the quality of the members that continue to serve our association as the coming year's board of directors. I wish them every success.

Please take time today to invite your friends and co-workers in the financial services industry to become members of our association. With each member, we add strength to our voice in Jacksonville, Tallahassee and Washington.

Gene Bryant
President, NAIFA-Jacksonville



NAIFA-Jacksonville Membership Luncheon

Wednesday, June 27, 2012

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

11:30 AM - 1:00 PM

Featuring the Installation of our 2012-2013 Officers and Board of Directors!

CLICK [HERE](#) FOR OUR SLATE OF OFFICERS AND DIRECTORS

PLUS GUEST SPEAKER:

Pat McManamon

"Building Blocks to Success"

A step-by-step review of achieving personal/professional success.

The cost is **\$20.00** for Members and **\$25.00** for Non-Members.

CLICK [HERE](#) TO REGISTER ONLINE! .



Special Thanks to our Luncheon Sponsor:



ABOUT OUR GUEST SPEAKER:

Patrick McManamon is the President of Sandler Training, a sales and sales management development firm helping corporations, entrepreneurs and professionals develop a strategy to reach the level of sales performance and leadership they desire through ongoing reinforcement of the Sandler Selling System. The system is designed to incrementally develop skills in sales and management mastery.



Prior to joining Sandler Training, Pat spent 18 years with the Fortune 500 Company, CSX, as Director of International Sales with a nationwide sales force. Pat was responsible for 62% of the company's sales, translating to \$136 million annually.

Pat has an undergraduate degree from Xavier University. He also attended the University of Michigan and the University of Chicago to add to his knowledge base in the areas of Finance for non-Financial Managers, Pricing and Marketing Methodology. Pat serves as a committee member of the Gator Bowl, a non-profit organization which benefits the northeast Florida business community and public schools. He is also a trustee for the Jacksonville Chamber of Commerce.

NAIFA-Jacksonville Blood Drive Update

Submitted by **Alicia S. Burst**

EVERY 56 DAYS?

If you qualify, you can save 3 lives, every 56 days. Sixty-five percent of us are eligible to donate blood, but only 5% of us do. This is one contribution to mankind and society that costs you nothing but about an hour of your time.



Please consider donating during NAIFA - Jacksonville's next blood drive scheduled for **Thursday, August 9th** at Liberty Center. This is located at 7077 Bonneval Road, the North West corner of I-95 and JTB, from 1:30 until 4:30 pm. Click on www.igiveblood.com for more information and/or an appointment. We urge you to make an appointment so that the mobile bus is enabled with sufficient personell and no one is made to wait.

If you are a NAIFA Member, employed in the LIFE insurance industry and donate blood, that qualifies you for APPS Paramedical Services drawing for a \$100 cash prize. Please be sure to notify your Committee Chair at Alicia@appsjax.com so that your chance is not missed.

During our last drive, **KC Padgett** of MassMutual donated and was not counted, inadvertently. KC will be included in our next drawing, regardless of her ability to donate again in August.

Congratulations to **Jeanne Peterson** of MetLife, our last recipient of \$100 prize (plus lunch at the Capital Grille)! Just a little extra bonus for participating in almost 100% of NAIFA's drives over a number of years.

"Exceptional Learning 2012"

NAIFA-Florida 80th Annual Career Advancement Conference and Expo



July 16-18, 2012

Hyatt Regency Grand Cypress, Orlando, FL

Click [HERE](#) for a complete brochure which includes the registration and descriptions of all conference sessions and continuing education seminars.

To register online, click [HERE](#)!

Check www.naifalorida.org for the latest news and updates!

Young Advisors Team News

REMINDER: Any **YAT** who recruits 12 or more **NEW** members will receive a free registration for the 2012 Career Conference and Annual Meeting in Las Vegas, NV. The YAT who recruits the most **NEW** members will also receive airfare (up to \$500) to attend the Conference.



You **MUST** be identified as a YAT in the database. This means that the "Date of Birth" and/or "License Year" must be filled out. Please contact the NAIFA Member Service Center at **(877) 866-2432** to confirm or provide.

YAT Recruitment Initiative: [CLICK HERE!](#)

YAT Forum and Conference Activities: www.naifa.org/benefits/yat/convention.cfm

YAT Activities at the NAIFA 2012 Career Conference and Annual Meeting in Las Vegas!

CLICK [HERE](#) FOR COMPLETE DETAILS!

YAT Takes NAIFA-Florida to School!

Join NAIFA-Florida on **July 16-18, 2012** for our annual State Convention at the Hyatt Grand Cypress Resort in Orlando. Immediately following the networking event and door prize giveaway on Monday, all conference attendees are invited to continue the fun with our YAT's for an exclusive one-of-a-kind party at Bar Louie, featuring Nashville recording artist **Jamie Davis!**



Transportation Provided!

FREE Entrance!

Private Party!

Food and Drink Specials!

For more information, please contact YAT State Chair Rod Whited at **(352) 219-6259**.

*The mission of the Young Advisors Team (YAT) is to **SOW** the value of membership with new and young advisors, so they are empowered to **SURVIVE** their first years in the business, to **GROW** into involved NAIFA members and become successful advisors who **THRIVE** in the industry and our association. **If you are under 40, or if you've been in the business less than 5 years, you're already a YAT!** For more information about NAIFA's Young Advisors Team, please click [HERE](#).*

*For more information, please contact Association Executive Cherri Coombs Ohmer, LUTCF at **904-695-2300** or email Cherri@NAIFA-Jacksonville.org.*

IFAPAC UPDATE

As the IFAPAC Chair for NAIFA-Jacksonville, I should be talking today about the issues surrounding our mutual business/industry and the importance of fund raising. However, I would like to share in "real-world" terms, the fact that our livelihoods are being threatened constantly by legislation that not only comes out of Washington but unfortunately Tallahassee as well.



It amazes me that we have people in office that neither deserves to be there nor have any acuity for the responsibilities they have. Sadly enough elected representatives have determined on several fronts, issues which they have no responsibility for, nor any constitutional right pursuing. Government of a "free republic" does not have the right or responsibility to interfere in free trade that is working responsibly and integrally.

Anyone and everyone reading this article must take stock in themselves and understand that we **can** make a difference when we commit ourselves sacrificially to a "worthy cause." Our industry, I believe, is one of the most worthy causes in America, for when the proclamation comes down from on high, saying, **"Did you do all you could have done? Did you help all that you could have helped? Did you care all that you could have cared?" What will your response be?**

Our industry is the only industry that can restore hope, values, joy and finances into the life of a

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 who have developed relationships with virtually every member of Congress.

Please, realize how important it is to give to this cause through IFAPAC and please make a contribution this day, without fail!

Respectfully,

Jayme G. Alfano
IFAPAC Chairman, NAIFA-Jacksonville

NAIFA NEWS

The Latest Headlines from the National Association of Insurance and Financial Advisors

NAIFA SmartBrief

PLEASE NOTE: Due to NAIFA's transition to the daily e-newsletter SmartBrief, NAIFA will no longer produce Weekly Connections after June 28, 2012. Read below to find out how to sign up for NAIFA SmartBrief. For regular news about NAIFA, please sign up for **NAIFA SmartBrief**. To register for this daily e-newsletter, please click [HERE](#).

- * [Medical Loss Ratio Harms Consumers and Agents](#)
- * [NAIFA Virtual Library - FREE online resource library](#)
- * [SRO Bill Will Provide Appropriate Oversight of IAs](#)
- * [NAIFA: Senate Bill on Insurance Licensing Would Benefit Agents and Consumers](#)
- * [Brian Ashe Is Named 2012 John Newton Russell Memorial Award Winner](#)
- * [NAIFA Members Discounts with NAIFA Travel Center](#)
- * [NAIFA Issues Statement on Supreme Court Health Care Law Hearings](#)
- * [NAIFA's APIC Legislative Contacts Attend Congressional Meetings](#)
- * [NAIFA June 14 Webinar: The Future of the Affordable Care Act](#)
- * [AmeriCard - Savings for NAIFA members on dental care, vision and prescription drugs](#)

NAIFA 2012 Career Conference & Annual Meeting

Registration is now open for the NAIFA 2012 Career Conference & Annual Meeting, to be held September 8 - 11 at Caesars Palace in Las Vegas!



Each year NAIFA members come from across the nation to enhance their professional development, connect with colleagues, tend to the governance of your association, and support the advocacy and political action work that is protecting your industry.

Long time attendees and first timers alike will all gather at Caesars Palace, and you should too!

For complete details and registration, click [HERE](#)!

NAIFA-JACKSONVILLE'S 40-HOUR PRELICENSING COURSE

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

UPCOMING COURSE DATES IN 2012!

June 22-25, July 20-23, August 17-20, September 21-24, October 19-22, November 16-19, December 14-17



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.

News From Robin and Peter



Submitted by **Robin S. Weinberger, CLU, ChFC, CLTC**
and **Peter N. Katz, JD, CLU, ChFC**

"Isn't It Nice to Have Options?"

An important stumbling block to the growth of the life settlement industry is the lack of consumer awareness that the option of a life settlement even exists. For a number of years, The Lifeline Program, one of the providers that we offer policies to for sale in the life settlement market, has used the well-known actress, Betty White, in their advertising. Recently, at the LISA

(Life Insurance Settlement Association) Annual Spring Meeting, two of the company's chief officers addressed the conference about a change in their advertising strategy.

In order to bring greater awareness of life settlements to the general public, The Lifeline Program decided to refocus their marketing efforts with Betty White. To that end, they created a music [video](#) with Betty, "I'm Still Hot," that has gone viral on YouTube. The video has also been honored with a 2012 Communicator Award of Excellence from The International Academy of the Visual Arts and the Communicator Awards.

Inevitably, someone at the meeting raised the question, "**What does Betty know about life settlements?**" Although 90-year-old Betty White is an iconic and beloved figure, she is an actress and not a financial planner. The speaker said he asked her that question himself and her answer was, "**Isn't it nice to have options?**" Interestingly, in one brief sentence Betty shows she "gets it."

Unfortunately, a number of life insurance companies and broker-dealers still don't "get it." Their restrictions on their producers could effectively deprive senior citizens of the option to sell policies that are no longer wanted or needed on the secondary market.

Betty understands that people deserve to have the same options with their life insurance policies as they would have with any other property. This is the same view espoused by Supreme Court Justice Oliver Wendell Holmes, Jr. more than 100 years ago in writing the landmark opinion in *Grigsby vs. Russell*:

"So far as reasonable safety permits, it is desirable to give to life policies the ordinary characteristics of property ... To deny the right to sell ... is to diminish appreciably the value of the contract in the owner's hands."

Without the knowledge that the option of a life settlement exists, consumers are effectively deprived of that option. We applaud The Lifeline Program and Betty White for trying to raise consumer awareness of life settlements which give seniors an option that could maximize the value of life insurance policies they have decided lapse or surrender.

For more information, please contact Robin S. Weinberger, CLU, ChFC, CLTC at (617) 451-3343 or rsw220@aol.com, or Peter N. Katz, JD, CLU, ChFC at (860) 673-3642 or pkatzlife@yahoo.com.

Jax Advisors Online is a monthly publication of the Jacksonville, FL chapter of the National Association of Insurance and Financial Advisors. Opinions expressed are those of the authors and advertisers and do not necessarily represent those of NAIFA-Jacksonville.

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.

