



JAX ADVISORS ONLINE: MARCH 2013

The Membership Newsletter of the National Association of Insurance and Financial Advisors - Jacksonville, FL

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Message From the President

S. Roger Dominey, CLU, CFP®, ChFC



March is the month we focus on YAT. What is YAT? It's our [Young Advisors Team](#).

YAT was created for members of NAIFA who are 40 years of age or younger or within their first five years in the industry. The purpose of YAT is to ensure that our younger/newer advisors receive the vital tools, resources and networks necessary to succeed in the financial services industry.

There is no cost associated with being a part of YAT if you're under 40 or 5 years or less in the industry; you are automatically a part of YAT by being a member of NAIFA. **Cheryl Canzanella** leads this group for NAIFA-Jacksonville. Please contact Cheryl at ccanzanella@financialguide.com or **904-997-2347** for more information. We want to see you achieve all of your goals for your career and we are determined to help!

Please make plans to join us at our next meeting March 27th to hear **Carol Taylor** give us the latest "Health Care Update." She has read the entire package on the Patient Protection & Affordable Care Act, she has participated in countless seminars, town hall meetings and other educational event meetings both locally and nationally.

It is true that NAIFA members make more money! If you have a colleague in the business who is not a member, please talk to them today and invite them to our next program. If you would like our membership team to speak to them or your agency please contact our Membership Chair, [Margie Harner](#).



YAT "Panel of Peers"

Growth Through Strategic Alliances... A View From Both Sides



Thursday, March 21, 2013

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Today's economic climate has created a number of business challenges for young professionals in any profession. Many are looking for new way to grow their practices and are turning to their peers for help in doing so. Building successful strategic alliances require time and diligence however the potential reward is well worth the effort.

You will learn what sets true strategic alliances apart from informal referral arrangements and how that difference will benefit both you and your partners so that you can see why and how they can be very attractive to other professionals.

Special thanks to **Principal Financial Group** for sponsoring this event!

BlackFinn American Grille

4840 Big Island Drive, Jacksonville, FL 32246

Appetizers and Cash Bar!

5:30 - 6:00 pm - Networking & Socializing

6:00 - 7:00 pm - Panel Discussion

7:00 - 7:30 pm - Networking & Socializing

Moderator:

Howard Rosenblatt, CLU, ChFC, LUTCF

YAT Panelists:

Tammy Lally, Financial Advisor with New York Life

Nathan Rogero, Financial Advisor with MassMutual

Chris Keever, Associate Attorney with The Law Office of Preston H. Oughton

CPA to be announced

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

YAT "Dessert First" Highlights!



Special thanks to **Howard Rosenblatt, CLU, ChFC, LUTCF** for his presentation on "Breaking Into the DI Market" at NAIFA-Jacksonville's Young Advisors Team "Dessert First" event prior to our Membership Luncheon on February 27th!

Click [HERE](#) for photo highlights!

NAIFA-Jacksonville Membership Luncheon

Wednesday, March 27, 2013

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



11:30 am - 1:00 pm

"A Health Care Update"

Guest Speaker:
Carol Thomas



With over 16,000 pages of regulations, the Patient Protection & Affordable Care Act is a complex myriad of laws and rules. Recently released regulations account for over 2,000 pages of new rules and contain many new items that employers, employees and individuals need to know. How will transitional relief work for group clients? How will the taxes imposed on health insurance carriers affect premiums? What new mandates will be required? What is the difference between actuarial value and minimum value? Will carriers be allowed to offer non-compliant plans? Will agents be allowed to sell through the Exchanges? Learn about these crucial items to help you and your clients navigate this complex maze of laws and regulations.

Carol Taylor is a licensed health and life agent and has a Bachelors Degree in Accounting from the University of Central Florida. Having worked in the insurance industry for over 23 years in various capacities, her expertise ranges from individual policies to large self-funded groups. Her duties have included insurance accounting, claims auditing, and account management.

Having read the entire Patient Protection & Affordable Care Act and most of the over 16,000 pages of regulations, she has participated in countless seminars, town hall meetings and other educational event meetings both locally and nationally. Carol has met with Congressmen, Senators and their staff and with the Florida Office of Insurance Regulation. She is regarded as an industry expert and has been interviewed for multiple newspapers, journals and radio stations. Carol was chosen to ask the "health care question" at the CNN Republican Presidential Debate held in Tampa, FL in September 2011.

Carol is a member of the Jacksonville Association of Health Underwriters (JAHU), and assumed the role of Legislative Chair in February 2009. She has served on their Board of Directors since 2010. She received the Emerging Leader Award from the FL Association of Health Underwriters (FAHU) in 2011. Carol is also a two time United Benefit Advisors Staff Person of the Year

award winner for her work with legislative issues and assisting the over 140 partner firms nationwide with PPACA compliance issues.

Carol has served on the Clay County Chamber of Commerce Business Development Advisory Board and was chosen for the Clay County Chamber of Commerce Business Person of the Year award in October 2010.

The cost is \$20.00 for members and \$25.00 for non-members and guests.



CLICK [HERE](#) TO REGISTER ONLINE!

THANK YOU TO OUR LUNCHEON SPONSOR!



For more information, please contact Association Executive Cherri Coombs-Ohmer, LUTCF at **(904) 695-2300** or e-mail info@naifa-jacksonville.org.

Day Of CE Photo Highlights!

Thank you to all who attended **NAIFA Jacksonville's Day of CE** on February 19th! Many comments were shared on what a great event it was for learning from the best advisors in Northeast Florida! New connections were made and friendships reinforced. Due to the success of the event, we are planning another Day of CE for the fall.



Congratulations to **Bobby Siddell** for being the winner of the tablet! More photo highlights can be found by clicking [HERE](#)!

If you are interested in teaching a course or know someone who would be a great instructor, please contact Frank Mantay, CFP at **(904) 443-2511, ext. 11**.

Thank You to Our "DAY OF CE" Sponsors!



Don't forget our licensing courses held at UNF's Banner Center. They will help launch your friends and recruits in our career!

**40 Hour Life, Health and Variable Annuity:
March 15-18 & April 19 - 22nd**

**Series 6 Pre Licensing Course:
April 25 - 27th**

To learn more about these courses, visit our website www.naifa-jacksonville.org under the **Professional Development** tab.

Blood Drive Update



**Submitted by Alicia Burst
NAIFA-Jacksonville Blood Drive Chair**

Our November Blood Drive prize was drawn at the February 27, 2013 Membership Luncheon. **Chip Dempsey** was that quarter's recipient of APPS Paramedical Services' \$100 cash drawing. Chip has consistently donated at almost all of our NAIFA Blood Drives.

Congratulations, Chip!



Saving lives is a great habit to get into. If you've never done so, it's a sense of compassion hard to duplicate. Plus, it's good for your health!

We've consistently held them at Liberty Center, but if your agency prefers a different location and you can guarantee at least 15 donors, we will move the bus, just for you!

Our drives for the remainder of this year are **Thursday, June 27th** and **Thursday, October 10th**. Both are busy times and needs are critical as they are close to holidays where unfortunately accidents are more prevalent.

A special thank you to NAIFA-Jacksonville President **Roger Dominey** whose office and agent staff made for a great turnout for February's drive.

If you'd like more information on saving lives, please visit www.igiveblood.org.

NAIFA-Florida Legislative Day on the Hill

**CALLING ALL
NAIFA-FLORIDA MEMBERS!**



REGISTRATION IS OPEN!

March 11-12, 2013

Tallahassee, FL

Governor **Rick Scott** has been invited to share with us his vision as Florida's 45th Governor.

We need **YOU** in Tallahassee - **NOW** more than **EVER!** You are cordially invited to join your colleagues at NAIFA-Florida's legislative event of the year! With numerous legislative proposals coming up this year, including health care reform, **it's imperative that you join us in Tallahassee** to discuss with your legislators the issues of vital importance to your profession, for the protection of your business, and your clients financial security.

To print out a registration form with all details, [CLICK HERE!](#)

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

NAIFA Congressional Conference



Registration for the **April 8-9, 2013 NAIFA Congressional Conference** in Washington, DC is now open! Don't wait! Click [HERE](#) to register now!

NAIFA's Congressional Conference will bring NAIFA members together to learn about the legislative issues that matter to people in our industry, and most importantly, our clients. You will then take that knowledge to Capitol Hill when you meet with your Members of Congress to discuss these issues. For additional information about the Conference, view the [FAQs](#).

The looming threat to the tax status of many insurance products is very real. NAIFA needs you to attend this Conference and defend our industry.

Please register and join us in April where together we can make a difference!

81st Annual NAIFA-FL Career Conference

Registration Is Open - Act Now!!

July 15 - 17, 2013

JW Marriott Grande Lakes in Orlando



Register now for **NAIFA-Florida's 81st Annual Career Conference and Expo** at the crown jewel of Orlando luxury resorts - the JW Marriott Grande Lakes! Join your colleagues from around the state and be a part of the event of the year! Experience a blast of motivation from industry titans like **Tom Hegna, Van Mueller** and **Ryan Pinney**, who will charge you up and give you new ideas, perspectives and insights to power your career to the **PINNACLE OF SUCCESS!**

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

Member Benefit of the Month

The NAIFA Quality Award is the Mark of Distinction!



The NAIFA Quality Award provides advisors at any career stage, the opportunity to demonstrate a commitment to exceptional professionalism through education and earned designations; production measured by performance metrics customized for each practice specialty; adherence to the NAIFA Code of Ethics and service to your industry association.

To view a list of NAIFA-Jacksonville's NAIFA Quality Award recipients for 2012, please click [HERE](#)!

Display the mark of NAIFA Quality. Apply today and be recognized not only by your colleagues but by your clients and companies. For more information and to apply for the NAIFA Quality Award, please click [HERE](#).

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.