

Next Meeting - Tuesday, April 26th, 2011

Luncheon 11:15am – 1:00pm

[CLICK HERE TO REGISTER ONLINE FOR THIS MONTH'S LUNCHEON](#)



President's Letter

Timothy Roels, Jr.

Dear Fellow Member,

The 2010-2011 NAIFA-Fort Worth business year is half way through, so we ONLY have half the year left with so many great things for members to participate in. I hope you have enjoyed the luncheons, C.E.'s, special Annuity and Long Term Care courses, and all the community service projects to date because we have more in store in the coming months.

Assuming you have grown personally and professionally, I would like to ask you to share this opportunity with as many people in our industry as you can.

March is National Membership Month and we need your assistance! Help us by making a phone call or stopping by a colleague's office and offering a chance to participate in all NAIFA provides. Send them to www.naifa.org where the process is so easy a "caveman can do it" (they won't mind if I borrow that...it's in the insurance industry). Suggesting the importance of protecting their industry "livelihood" and the products they sell to clients may help break the ice.

With thousands of agents and advisors in the metroplex that could benefit from associating with NAIFA-Fort Worth, we are excited about the possibilities with everyone making the effort. If they are on the fence, invite them to the Golf Tournament on April 20th, or the luncheon April 26th, and we will make them feel right at home. All guests for the luncheon will **only** be charged \$15.00 if they register online before the 4/26 meeting. If you have any questions about membership or getting someone signed up, please contact James Stoner at (817) 845-3268 or james@advisoraffinc.com.

Finally, for any young agents (under age 40) or Agents/Advisors new to the business, I would like to extend a special invitation to the Young Advisors Team (YAT) Happy Hour at Capital Bar on May 12 from 5:30-7pm.

All the best,

Tim Roels
 NAIFA-Fort Worth President



March 2011 National Membership Month “Membership Drive” Contest

Goal: Incentivize current membership base to recruit new members during March Membership Month by providing a monetary reward for new member recruitment.

Each current NAIFA member who recruits three to five new members between Tuesday, February 22, 2011 and March 31, 2011* will receive a check from NAIFA for \$100.00 in April 2011. (Money is non-transferable to other members.)

Each current NAIFA member who recruits six or more new members between Tuesday, February 22, 2011 and March 31, 2011* will receive a check from NAIFA for \$300.00 in April 2011. (Money is non-transferable to other members.)

Administrative Details

Your name must be entered clearly on the membership application (paper or online) as the sponsor to be eligible to receive credit. [Click here](#) to go to the membership page on the NAIFA website.

Lapsed members over six months will be given a reinstatement date and will be eligible for the “Membership Drive”. The reinstatement date must fall between February 22, 2011 and March 31, 2011. Members who reinstate their membership within six months of lapsed are considered renewals and not eligible for credit.

You must be a current member as of April 1, 2011 to receive compensation.

All new members recruited during March Membership Month must be current on April 1, 2011.

No new member may have more than two sponsors.

All new members recruited during March Membership Month also count towards the YAT membership recruitment contest and the Outstanding Member Recruiter Award and prizes.

Faherty Joins Editorial Council

Kevin Faherty, LUTCF has been named to the Editorial Advisory Council of *Advisor Today*, NAIFA's national magazine. Editor-In-Chief Ayo Mseka welcomed Kevin to the working group in January.

Faherty has been an editorial consultant for three professional journals, and has written numerous articles for industry publications. He was President of NAIFA-Fort Worth in 1999-00', served as Regional Director for NAIFA-Texas, and is currently local chairman for Field Practices and Ethics.

Save the Date!

Mark your calendar to participate in the 2011 NAIFA-Fort Worth Golf Tournament on Wednesday, April 20, 2011.

This year's tournament will be held at Woodhaven Country Club. The tournament will begin with a shotgun start at 1:00pm.

More details will be coming soon!



NAIFA-Fort Worth to Offer Class



FA 262 Foundations of Financial Planning: An Overview
 March 9th, 11am at 6300 Ridglea Pl Suite 724, Ft Worth 76116
 John Park, Moderator

Attention LUTCfs...you may be able to earn your FSS designation by simply taking 2 or 3 additional classes. Register now by contacting Suzanna Powell at 817 996-7000 or suzannapowell@charter.net

NAIFA-Fort Worth Offers More Opportunities for CE Credit

Each year, NAIFA-Fort Worth makes 15 hours of CE credit available to help members complete their CE for license renewal.

So far this NAIFA year, there has been a Fall CE Roundup for 5 hours, and an annuity certification class for 4 hours. Coming this spring in May, look for details of another CE event (TBD) for an additional 5 hrs. That's a total of 14 classroom hours.

In addition to the classroom hours, there is another 4 hours available for being an active member of NAIFA-Fort Worth. See the form on the following page to apply for credit.



Texas Department of Insurance

Licensing Division, Renewals, Appointments & Continuing Education

Mail Code 107-1A • 333 Guadalupe • P. O. Box 149104, Austin, Texas 78714-9104
512-322-3503 telephone • 512-490-1054 fax • www.tdi.state.tx.us

REQUEST for banking of ASSOCIATION CREDIT ACCEPTED BY TDI
See 28 Texas Administrative Code § 19.1011(f)(g) and § 19.1020

Holders of National Professional Designations may claim credit for reviewing educational materials from the National Designation Sponsor or attendance at educational presentations of the National Designation Sponsor.

Current members of state or national insurance associations may claim credit for reviewing educational materials from the state or national insurance association or attendance at educational presentations of the state or national insurance association.

Up to two hours may be claimed for reviewing educational materials. Up to four hours may be claimed for attendance at presentations. The content must be insurance or insurance-related.

A maximum of four hours total may be claimed once per licensing cycle. File when you have earned all four hours or when you are about to renew and can't earn any more. **The hours claimed, no matter how earned, count toward the licensee's required Continuing Education as Self-Study credit.**

Texas Association C.E. credit requested by: _____
PRINT CLEARLY PLEASE (Licensee Name)

(City) TX (State) _____ (Zip Code)

(Licensee's Telephone Number)

(TDI License Number)

(Licensee's E-mail Address)

Current member of: _____

Holder of National Professional Designation: _____

Publications reviewed or educational presentations attended (Please be specific. May continue on another page)	Reviewing/Attending Hours	Date
---	---------------------------	------

I affirm that I hold the above National Designation or am a member in good standing of the above state or national association and have completed at least the hours claimed in the named activities.

Signature of License Holder

Date



The Premier Association of
Financial Professionals®

MDRT Minute

Creating Business Value by Developing a Strategic Business

Think back to the last business week. How much time was spent on your business (strategic) versus in your business (operational)? If you are spending 51 percent or more of your time in your business, then you need to seriously rethink the activities you are scheduling. To create a more strategic business, you need to follow four golden rules:

Rule No. 1: Increase the number of the clients you choose to have. Many businesses realize that a number of clients waste their time. You can have the most amazing client service in the world, but if you are not being paid sufficiently for what you offer, the business is not a business, it's a charity.

First, consider terminating your relationships with the 20 percent of your clients who you rarely enjoy working with. Second, examine your business's marketing engine and the income it generates. Consider up to six streams of income, with a minimum of four. Streams to consider include:

Personal introductions	Advertising
Websites	Breakfast clubs
Seminars	Business briefings
Specialized networking	

Rule No. 2: Increase your transaction value. Few financial advisors think about this aspect. How would you rate your offering to clients? Have you recently asked your clients what they think of it? Do you plan meetings that open prospects' minds to new possibilities? Do you talk about their dreams and offer real ideas of how to get what they want? Consider creating a half-day client clinic, where you meet with a cross section of your clients to get some all-important feedback to improve your offering for the future.

Rule No. 3: Increase the transaction frequency. To increase the transaction frequency, you must increase your communications with clients. If you're not contacting your clients, other people will. Use MP3 files or video clips, in which you deliver a helpful, finance-related message. These messages can be sent via e-mail or using a service such as YouSendIt.com. I'm also in favor of newsletters, as long as they're not called "newsletters" and the information is bright and interesting. The content should be all about how your clients can improve their financial lives and not about what you're doing in your office. Do your best to stay in consistent, conversational contact with clients.

Rule No. 4: Create and improve your business systems. What score out of 10 would you give your business systems right now? I hired a great practice manager, Helen Sweet, who has designed simple business processes for all of us, and mini-processes within the main system for business to be submitted, phones to be answered and our team to be looked after.

Your Number 1 product is, and should be, your business. The moment you get this, you'll start to get more sleep at night, more income, more time off and more time for quality thinking.

Michael Bell is a 15-year MDRT member from Sheffield, England. He started his own company, Results Financial, in 1998. The company now has 20 advisors and seven administrators. Bell is also a member of the Personal Finance Society and has spoken at conventions around the world. His entire 2010 Annual Meeting presentation is available at www.mdrtpowercenter.org.

MANAGERS PLEASE COMPLETE FOR YOUR AWARD WINNER

All nominations are due to the NAIFA-Fort Worth office by May 8, 2011

NAIFA-FORT WORTH ACHIEVEMENT AWARD
NOMINATION FORM

Awarded to outstanding insurance and financial advisors in their initial five years in the profession. Nomination fee of \$35 includes award and lunch for recipient

AGENT'S FULL NAME AND NICKNAME: _____

SPOUSE'S FIRST NAME: _____

SHOW EXACTLY HOW NAME IS TO APPEAR ON THE AWARD PLAQUE:

MANAGER AND/OR SPONSOR: _____ AGENCY _____

COMPANY NAME: _____

DATE ENTERED LIFE INSURANCE BUSINESS OR SECURITIES BUSINESS: _____

SHORT BACKGROUND OF NOMINEE

WHERE BORN (CITY): _____

HOBBIES: _____

BUSINESS OR CIVIC ORGANIZATIONS:

INDUSTRY AWARDS WON: MDRT () TLRT () NQA () NSAA ()

NMSA () COMPANY LEADERS CLUB ()

OTHER AWARDS: _____

OTHER COMMENTS REGARDING NOMINEE: _____

NAME AND TITLE OF PERSON PRESENTING AWARD TO AGENT:

The NAIFA-Fort Worth Achievement Award can be presented to more than one person in a company, district, region or agency but not to individuals who have previously received the honor.

PLEASE ENCLOSE OR EMAIL A PHOTOGRAPH OF YOUR NOMINEE

Recipients must be members of NAIFA to receive this local award.

Please include your Nomination Fee with Application and forward to:

NAIFA-Fort Worth, P.O. Box 828, Fort Worth, TX 76102 info@FWAIFA.org

NAIFA-Fort Worth February Luncheon



Mass Mutual is recognized for contributing the most during the food drive for the Tarrant Area Food Bank.



Thanks to Justin Newman from luncheon sponsor Jackson National for supporting NAIFA-Fort Worth!



Thanks also to George Williams from luncheon sponsor Nationwide for supporting NAIFA-Fort Worth!



Angela Lamb presents a bouquet of flowers to Barbara Ragsdale – wife of Career Service Award recipient, Olin Ragsdale.



Frank Correa presents the Career Service Award to Olin Ragsdale.



Helping honor Career Service Award recipient Olin Ragsdale were (from left) attorney Nick Pappas, daughter Shelli Harveson, wife Barbara, and Bill Ford (right).



LifeTimes The Newsletter for Members & Associates



2010-2011

Calendar of Events

March 1 st	Newsletter e-mail
March 29 th	9:30-11:00 Board Meeting /NO LUNCHEON....
April 5 th	Newsletter e-mail
April 20 th	2011 NAIFA-Fort Worth Golf Tournament – 1:00pm Shotgun Start at Woodhaven Country Club
April 26 th	9:30-11:00 Board Meeting /luncheon “Business Meeting” at RCC 11:15-1:00pm
May 3 rd	Newsletter e-mail
May 24 th	9:30-11:00 Board Meeting /luncheon at RCC 11:15-1:00pm NOT THE LAST TUESDAY!!!!

Timothy Roels, Jr., CLTC
 President

Marketing Group
 817-271-4071

timothyroels@yahoo.com

Angela Medcalf Lamb
 Secretary

Farmers Insurance
 817-361-9864

alamb1@farmersagent.com

John Park
 National Committee Person
 Retired

817-994-2536

Jpark.1@charter.net

Esther Davis
 Executive Director
 817-781-0439

davisvr@copper.net

Paula Kurecka
 Director (2008-2011)
 Career Awards Banquet
 817-475-2455

pkureckafinance@sbcglobal.net

Parker Consaul, CFA
 Director (2009-2012)
 Government Relations
 Pivotal Financial
 817-600-7368

Parker@pivotalfinancialadvisors.com

Brett Ruddell, LUTCF
 Director(2009-2012)
 IFAPAC

Fort Worth Financial
 817-999-8092

brettruddell@sbcglobal.net



Monte Ferguson, CFP®
 President-Elect

Pivotal Financial
 817-201-8776

mc.ferguson@hotmail.com



Sean O'Brien
 Treasurer

Principal Financial Group
 817-731-5500

o'brien.sean@principal.com



Charles Booth, LUTCF, CSA, RFC
 Immediate Past President

Spectra Asset Conservation Specialists
 817-222-2122

charles@assetconservation.com



Brent Husted
 Director (2008-2011)

Jack E. Bobo Award
 Safeguard Investments
 817-909-9786

brent@dontloseyourshorts.com



James Stoner
 Director (2008-2011)

Membership
 Advisor Affiliates
 817-447-2811

james@advisoraffinc.com



Gordon Rhodes
 Director (2009-2012)

Corporate Sponsorship
 Rhodes Securities, Inc.
 817-334-0455

gr@rsi2.com



Robert Jackson, CLU, ChFC, AEP
 Director (2010-2013)

Professional Development
 Mass Mutual
 817-334-2314

bjackson@finsvcs.com





LifeTimes The Newsletter for Members & Associates

Carlton McLain
 Director (2010-2013)
 Membership
 McLain Insurance Group
 817-798-0088

Cmclain@mclaininsurancegroup.com

Kevin Ahalt
 Health/AHIA
 Aetna Small Groups
 817-637-9276
ahaltkm@aetna.com

Kevin Faherty, LUTCF
 Field Practices/Ethics
 Faherty Insurance Services
 817-886-4668

kfaherty@hotmail.com

Todd Miller
 Health/AHIA
 Worth Benefits & Consultants, Inc
 817 988-8536

toddm@worthbenefits.com



Lesley Pinckard, CLU, LUTCF
 Director (2010-2013)
 TLRT/Newsletter
 Mutual of Omaha
 817-226-4403

Lesley.pinckard@mutualofomaha.com

Ed Barrera
 Photography
 Retired
 817-294-9007

e.l.barrera@att.net



Ray Griffith, CFP, RIA, BS
 Past President's Committee
 Granite Financial
 817-379-9323

ray@graniteteam.com



Suzanna Powell, LUTCF
 Professional Designations/Public
 Relations
 Suzanna Powell Insurance
 817-996-7000

suzannapowell@charter.net



Newsletter Advertising Opportunity

NAIFA-Fort Worth offers you the chance to be seen in front of advisors and agents all over Texas 12 times per year with our updated ad price guide. You get a full color ad in each issue in the one size you want. The prices are simple:

- | | |
|--|--|
| Full page \$700 | ³ / ₄ page \$600 |
| ¹ / ₂ page \$400 | ¹ / ₄ page \$200 |
| Business card size \$150 | |

If you would like to advertise with the NAIFA-Fort Worth LifeTimes Newsletter, please call 817-492-0637 or email info@fwaifa.org to get started. The next newsletter deadline is March 17, 2011.