

Next Meeting – October 18th, 2011

Luncheon 11:15am – 1:00pm
 Ridglea Country Club



President's Letter Monte Ferguson

Dear Fellow Members,
 Greetings!

Each attendee at our September luncheon was touched by the real life story shared by our guest speaker, Edna Elizondo. The value of life insurance was again visited during our Life Insurance Awareness month proclaimed and supported by newly elected Mayor Betsy Price. Additionally, we kicked off another NAIFA FW community service event supporting Tarrant

County Food Bank. I would like to personally request everyone's participation in this incredibly important mission being fought by a group of volunteers who need our help! NAIFA Fort Worth members have a proud tradition of giving back to their community via similar vehicles and I know we can make this year the best ever.



What's next? I am glad you asked!

We are set to bring you an exciting program featuring Dave Roever on October 18th at Ridglea Country Club. Please see the www.fwaifa.org for details and to register as you will not want to miss this dynamic speaker during National Membership month. While we remain strong as an organization, we are poised to grow by 15% this year with your help. Tell a colleague about your NAIFA experience, how you joined and use the website mentioned above to help them get involved. The rest is on us at the Board, as your servants, to usher them into our ranks. We will handle each one with great care as an extension of your willingness to speak to them about NAIFA FW. Thank you for your loyalty and diligence in this worthwhile endeavor.

We will also focus our efforts along the mission of supporting our Political Action Committee as October 13th has been declared as "back the PAC" day. Consider your \$10 per month contribution as "insurance" to protect your personal career. The fight is ongoing with your NAIFA PAC standing strong in the protection of the many tax benefits insurance products receive. With sovereign debt ever increasing, politicians will attempt to tap every source of revenue to fund the current policies. You can make a difference! Fill out the form and make the investment in your future.

Finally, we will honor our deserving Military Veterans next month in appreciation of their sacrifice while serving us. I look forward to seeing you, your colleagues and your staff as we gather as a group of professionals for the purpose of becoming more knowledgeable and better networked to serve our clients' needs!

Warm regards,
 Monte C. Ferguson CFP®, ChFC®
 2011-2012 President

[CLICK HERE TO REGISTER ONLINE FOR THE OCTOBER LUNCHEON](#)



The Hungry: You can insure their future.

On any given day in North Texas, tens of thousands of families and individuals struggle with food insecurity and hunger. This means that **Food donations are needed any time of the year** for low-income families, senior citizens, unemployed workers, individuals with chronic illnesses or disabilities that prevent them from working, homeless families, children in after-school programs in low-income neighborhoods, victims of family violence and others in need.

Why Food Drives are Critical

- Of the tens of millions of pounds of food Tarrant Area Food Bank handles each year, annual Food Drives account for approximately 1,000,000 pounds of the total poundage distributed.
- Funds donated through Food Drives are used to purchase much needed staples that our partner charities request.
- Annual Food Drives establish relationships with local employers and organizations that can be called upon during disasters to serve as drop-off donation sites.



Fall/Holiday Food & Fund Drives feed families from September 27th through November 17th, 2011.

How can you help? Commit to being a host location for a food collection box. A member of NAIFA-FW will be in contact with you to arrange for a donation box to be placed in a location of YOUR choice. We will also arrange for pick-up of the donated items on a regular basis. Each host location will receive recognition in the December newsletter.

If you would like to make donations or host a food collection box, please contact Crissman Crombie at Criss@Graniteteam.com or 817-715-4334.

Hunger: For some it's short term; for others it's whole life



Member Benefits

Becoming an IFAPAC contributor will immediately provide you with membership benefits. You will receive:

- the realization that you are exercising your rights to participate in deciding who will run this country and that you are more democratically active than the majority of your fellow citizens;
- the power of combining your voice with thousands of your fellow insurance agents and financial advisors in an expression of preference in national elections;
- the respect of your peers who recognize that membership in IFAPAC means you are politically astute and you care enough to be involved;
- the awareness that your business interests are being addressed on Capitol Hill when candidates supported by IFAPAC win;
- the knowledge that, as one of the nation's largest insurance political action committees, when IFAPAC decides to support a candidate, people pay attention;
- the appreciation that IFAPAC has a stellar reputation as a straight-shooter – when we say we'll back a candidate, that candidate knows that tens of thousands of insurance agents and financial advisors stand behind that campaign;
- the insight to important legislative issues that will impact your day-to-day existence as a professional in the financial services field; and
- the satisfaction of knowing that you are not passively standing on the sidelines wishing you had done more to shape the laws of our nation.



The Premier Association of
Financial Professionals®

MDRT Minute

Daily Vitamin C's

Don Meyer was in the middle of a successful basketball coaching career when he was involved in a serious car accident in 2008. Surgery to treat some of the injuries also uncovered a diagnosis of a slow-growing but inoperable cancer. Unable to speak, he wrote on a notepad to his family to ask when he would be able to return to coaching.

His tenacity led the sports broadcasting company ESPN to acknowledge him with the Jimmy V Perseverance Award during the 2009 ESPY (Excellence in Sports Performance Yearly) Awards. Coach Meyer shared his “five daily vitamin C’s” that took him to the top and explained how MDRT members can adapt them to find greater success.

Concentration

Concentration is the ability to focus and make the main thing the main thing. When you meet with a client, make them feel like they’re the most important person. To develop concentration in your work, use Sunday as a deadline for planning the next week’s activities. Don’t go into a week without a weekly plan.

Courtesy

You can tell a lot about a person by watching them interact with the very old or the very young. How do you act when encountered with someone who needs your help and has nothing to offer you?

Communication

Work diligently to improve communication with clients and members of your staff. If you have a team or a group of people who don’t communicate openly, you have people who are scared.

Compete

To adopt a winner’s attitude, concentrate on what’s in front of you — not what has already happened. Great golfers focus on playing the shot in front of them, not rehashing the shot they just took. The difference between winners and losers is a willingness to accept responsibility. A loser will say, “Why me?” A winner will say, “What do we do now?”

Consistency

We control whether we’re surrounded by mediocrity or greatness, so we get what we accept or tolerate in our lives. If you’re having high turnover with staff or are receiving poor work from them, check to see whether you’re setting an example of mediocrity.

Don Meyer, Ph.D. is the former head basketball coach for South Dakota’s Northern State University. Coach Meyer currently holds the record for the most wins in the National Collegiate Athletic Association with 923 victories. Meyer retired from coaching in 2010 but continues at NSU as a Regents’ Distinguished Professor and assistant to the president. His entire 2011 Annual Meeting presentation is available at www.mdrtpowercenter.org.



CONTINUING EDUCATION ROUNDUP IN COWTOWN

Follow the long, dusty trail of continuing education to *Cowtown*, to be held at the Tarrant County Bar Association Conference Rooms, 1315 Calhoun Street, Fort Worth, Texas, and sponsored by the Fort Worth Society of Financial Service Professionals, NAIFA Fort Worth, and the Women in Insurance and Financial Services, DFW Chapter.

Registration before October 15, \$50 each half day; \$100 full day includes lunch and Happy Hour. After October 15, \$60 half day and \$120 full day. **Members of NAIFA, SFSP, FPA, WIFS and Estate Planning Council receive \$10 discount per half day.**

Date: Tuesday, November 1, 2011

Time: 9:00-11:15 Ethics for **CFP®** & **CLE** (2 hours of credit)*

10:15-12:30 Ethics for **Insurance CE** (2 hours of credit)*

11:30-12:30 (to be announced) (1 hour **CFP®**, **CLE** & **CPE**)

12:30-1:15 Box lunches will be provided; afternoon sessions offer 3 concurrent courses

1:30-2:30 "Making it Easier to Write Disability Income" (1 hour **Insurance CE**)

1:30-2:30 "Auditors at the Gate: 10 Potential Tax Traps" (1 hour **Insurance CE**)

1:30-2:30 "Strategies for Diversifying Concentrated Stock Positions" (1 hour **CFP®****, **CPE** & **CLE**)

2:45-3:45 "Retirement Timeline: What to Do and When to Do It" (1 hour **Insurance CE**)

Attendees will receive a certificate for required Annuity for Insurance TDI credits online.

2:45-3:45 "11 Common DI Mistakes", (1 hour **Insurance CE**)

2:45-3:45 "A Business Owner's Guide to Selling a Company" (1 hour **CFP®****, **CPE** & **CLE**)

4:00-5:00 "Long Term Care Insurance: The Tax Facts" (1 hour **Insurance CE**)

4:00-5:00 "Estate Planning for Blended Families using Life Insurance" (1 hour **Insurance CE**)

4:00-5:00 "Captive Insurance Companies" (1 hour, **CFP®****, **CPE** & **CLE**)

5:15-6:30 Happy Hour—Network with other Professionals

Contact:

Pat Pattison at 817-370-8942 for registration forms and additional information on speakers and topics, or email her at wifsdallas@flash.net.

*For those who need CFP® **AND** Insurance **Ethics**, all 3 hours will provide 2 credits for CFP® and 2 for Insurance TDI .

**Afternoon sessions for CFP® have been applied for and are awaiting approval.

NAIFA-Fort Worth September, 2011 Luncheon



Thanks to Jim Coyle from the DI Center and Union Central for sponsoring the luncheon.



James Stoner (right) visits with luncheon guests, John Mark Anderson (left) and Aaron McWilliams (center).



Jim LaCamp shared his latest economic outlook with the group.



Guest speaker, Edna Elizondo, shared her personal story of how life insurance helped her family.



Robert Watlington (left), was recognized for 50 years of NAIFA membership. Congratulations, and thank you, Robert!



PAC drawing winner, Murray Morton, took home a gift card, presented by Brett Ruddell.

2011-2012 Calendar of Events

October 4, 2011	Newsletter e-mail
October 18, 2011	9:30-11:00am, Board Meeting at Ridglea CC 11:15am – 1:00pm, Luncheon at Ridglea CC
November 1, 2011	Newsletter e-mail
November 29, 2011	9:30-11:00am, Board Meeting at Ridglea CC 11:15am – 1:00pm, Luncheon at Ridglea CC
December 6, 2011	Newsletter e-mail
December 13, 2011	9:30-11:00am, Board Meeting at Ridglea Country Club
	NO DECEMBER LUNCHEON
January 3, 2012	Newsletter e-mail
January 31, 2012	9:30-11:00am, Board Meeting at Ridglea CC 11:15am – 1:00pm, Luncheon at Ridglea CC
February 7, 2012	Newsletter e-mail
February 28, 2012	9:30-11:00am, Board Meeting at Ridglea CC 11:15am – 1:00pm, Luncheon at Ridglea CC
March 6, 2012	Newsletter e-mail
March 27, 2012	9:30-11:00am, Board Meeting at Ridglea CC
	NO MARCH LUNCHEON
April 3, 2012	Newsletter e-mail
April 24, 2012	9:30-11:00am, Board Meeting at Ridglea CC 11:15am – 1:00pm, Luncheon at Ridglea CC
May 8, 2012	Newsletter e-mail
May 22, 2012	9:30-11:00am, Board Meeting at Ridglea CC
June 5, 2012	Newsletter e-mail

Board of Directors

Monte Ferguson, CFP®

President

Pivotal Financial

(817) 201-8776

mc.ferguson@hotmail.com

Sean O'Brien

Secretary

Principal Financial Group

(682) 233-7009

o'brien.sean@principal.com

John Park

National Committee Person

Retired

(817) 994-2536

jpark.1@charter.net

Esther Davis

Executive Director

(817) 781-0439

davisvr@copper.net

Gordon Rhodes

Director (2009-2012)

Sponsorship

Rhodes Securities, Inc.

(817) 334-0455

gr@rsi2.com

Crissman Crombie

Director (2010-2013)

Community Service

Granite Financial Group

(817) 715-4334

Criss@graniteteam.com

Kevin Ahalt

Health/AHIA

Aetna Small Groups

(817) 637-9276

ahaltkm@aetna.com



Angela Lamb

President-Elect

Farmers Insurance

(817) 361-9864

alamb1@farmersagent.com



James Stoner

Treasurer

Advisor Affiliates

(817) 447-2811

james@advisoraffinc.com



Timothy Roels, Jr., CLTC

Immediate Past President

Marketing Group

(817) 271-4071

timothyroels@yahoo.com



Parker Consaul, CFA

Director (2009-2012)

Government Relations

Pivotal Financial

(817) 600-7368

Parker@pivotalfinancialadvisors.com



Brett Ruddell, LUTCF

Director(2009-2012)

Public Relations/Awareness

Fort Worth Financial

(817) 999-8092

brettruddell@sbcglobal.net



Robert Jackson, CLU, ChFC, AEP

Director (2010-2013)

Professional Development

Mass Mutual

(817) 334-2314

rjackson@finsvcs.com



Ed Barrera

Photography

Retired

(817) 294-9007

e.l.barrera@att.net





LifeTimes The Newsletter for Members & Associates

Michael Giannetti
IFAPAC Committee
New York Life
(817) 355-2549
mgiannetti@ft.newyorklife.com



Ray Griffith, CFP, RIA, BS
President's Advisory Committee
Granite Financial
(817) 379-9323
ray@graniteteam.com



Jonathan Leeper
Jack E. Bobo Award Committee
Financial Guide
(817) 334-2342
jleeper@financialguide.com



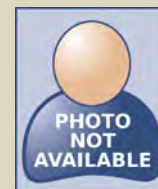
Todd Miller
Health/AHIA
Worth Benefits & Consultants, Inc.
(817) 988-8536
toddm@worthbenefits.com



Dean Ross
Field Practices/Ethics
New York Life
(817) 878-3257
bdross@ft.newyorklife.com



Paul Treske
Young Advisors Team (YAT)
New York Life
(817) 878-3215
ptreske@ft.newyorklife.com



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 October 20, 2011.