



FELLOW TALK

October, 2007

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"My best to all of you as we enter our 35th year as a LOMA society!"

A MESSAGE FROM OUR PRESIDENT



Paul Lindemann, CLU, FLMI, ACS
Catholic Aid Association

It's been said that time is life's great equalizer—we all have the same amount, and we never seem to have enough of it! I hope you'll give me a few moments of your time as I end my presidency of the LOMA Society of the Twin Cities.

TIME TO REFLECT

I can't believe how fast this year has gone! Although as individuals we often think we should have done more, I'm proud of what our Society has accomplished this year. Our attendance at meetings continues to increase. We're working with some of our largest supporting companies to increase their involvement in the Society. Above all, I believe more companies—and their employees—are realizing the importance of industry education.

TIME TO CONGRATULATE

Nearly 150 Twin Cities insurance professionals earned at least one new LOMA-sponsored designation over the past year. Some earned as many as *seven* designations! People are taking the initiative—and the time—to improve themselves, and their companies are supporting them. To those of you who earned LOMA designations this past year—be it one or seven—please accept our heartiest congratulations! Nothing would make me happier than to see all of you at Jax on October 9. We want to honor you and recognize you for your efforts—you deserve it! (If you know of someone who has earned a LOMA-sponsored designation since September 1, 2006, and is not mentioned on page 5 or 6, please let me know.)

A MESSAGE FROM OUR PRESIDENT (continued)



Mark your calendars:

Recognition Meeting
Tuesday, October 9
Jax Cafe

Holidazzle Parade
Thursday, November 29

Halloween
Wednesday
October 31



Visit us at

www.LOMA-TC.com

Visit LOMA at

www.LOMA.org

TIME TO RECOGNIZE

With time also comes change, and our Board is no exception. Last month, I regretfully accepted the resignation of Jennifer Victor-Larsen, our Member-at-Large. Thank you, Jennifer, for your hard work and dedication over the past five years. You will be missed!

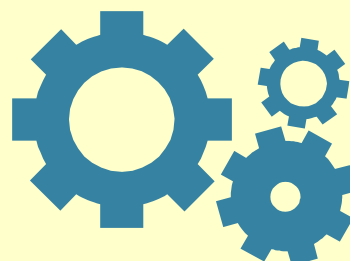
Even though it's always sad to see a Board member leave us, it's exciting to see other members come forward. Kevin Laskowski from Thrivent Financial has been nominated for the position of Secretary, and Anne Randazzo from the Catholic Aid Association will be joining us as Program Co-Chair. I look forward to working with both of you!

I also want to publicly thank our entire Board of Directors for giving their time and talents to our Society. Everyone worked hard and contributed to our successful year. I can honestly say I've never enjoyed working with a group of individuals more! I especially want to thank our Vice President, LuAnn Maxfield, for her dedication and support. I know that as I step aside in a few weeks, this organization will be left in very capable hands.

TIME TO GIVE THANKS

Finally, I want to thank all of you for allowing me to serve as your President this past year. It's been a privilege and an honor. Thanks also for your support of the LOMA Society of the Twin Cities. Your time is valuable, and I'm glad you've chosen to give some of it to us. I hope we've made it worth your while.

My best to all of you as we enter our 35th year as a LOMA society!



RECOGNITION MEETING

Agenda

Speaker

Location: Jax Cafe
1928 University Avenue NE
Minneapolis, MN 55418
Phone: (612) 789-7297
www.JaxCafe.com

Cost: Members - \$40
Non-Members - \$50

Agenda: 5:30 Registration & Social Hour
6:00 Dinner
6:45 Elections & Business Meeting
7:00 Keynote Speaker: Jason
Busch, Internal Sales Manager,
Allianz Life
7:30 Recognition Ceremony

Dinner: Cream of Tomato & Basil Soup
Jax House Salad
Bread Service
Carrot Cake
Coffee, Tea or Milk



Tenderloin Filet with
Sauce Bordelaise, Garlic Whipped
Potatoes and Chef's Vegetable

Broiled Atlantic Salmon, New
Potatoes and Chef's Vegetable

Chicken Kiev, Wild Rice Pilaf and
Chef's Vegetable

Guest Speaker: Jason Busch
Internal Sales Manager
Allianz Life
"Education is the Key"

Charity: Minnesota Helps – 35W Bridge
Disaster Fund

Jason Busch

Internal Sales Manager, Life Case
Design Team
Allianz Life Insurance Co. of North
America

The LOMA Society is pleased to announce that Jason Busch, Internal Sales Manager, Life Case Design Team, Allianz Life Insurance Company of North America, will be the keynote speaker at the Fall Recognition Dinner. He will speak on the importance of education in our industry.

Jason is a graduate of Hamline University, with majors in Education and Social Studies, and holds a MN teaching license. Jason worked as a teacher in the St. Paul Public School district, before making a career change and joining Allianz Life in 2004, as an Internal Sales Representative in Allianz's award-winning call center. Jason was promoted to a management position in 2005. He currently manages a team of 10 internal sales representatives that specialize in life insurance.

Jason has been an outspoken advocate for the LOMA education program at Allianz, and volunteered to lead a study group for employees pursuing their AAPA designations. Jason will be attending the 2007 LOMA conference in Quebec City, to accept an Educational Achievement award, on behalf of Allianz Life.

Jason currently holds his ACS designation, and is pursuing the AAPA and FLMI designations. He also recently began studying for his CLU designation.

2008 OFFICER NOMINATIONS

The Nominating Committee of the LOMA Society of the Twin Cities has recommended the following slate of officer candidates for 2008:

PRESIDENT

LuAnn Maxfield
Hartford Life

VICE PRESIDENT

Genevieve Stadler
Prudential Financial

TREASURER

Lori Fitzpatrick

SECRETARY

Kevin Laskowski
Thrivent Financial

MEMBER AT LARGE

Rolf Anderson
New York Life

SOCIETY COMMITTEE REPRESENTATIVE

Dixie Carroll
Ameriprise Financial

PROGRAM CO-CHAIR

Anne Randazzo
Catholic Aid Association

The election of Society officers for 2008 will take place at the Recognition Meeting on Tuesday, October 9.

HOLIDAZZLE

JOIN US FOR HOLIDAZZLE!

The State Fair just ended and the kids are back in school, but it's not too early to start thinking about spreading holiday cheer.

The LOMA Society of the Twin Cities has helped spread holiday cheer for many years by participating in the Holidazzle Parade in downtown Minneapolis. We spend one evening walking in front of the annual holiday parade on Nicollet Mall to collect donations of food and cash for the Emergency Foodshelf Network.

This year, we plan to join the parade on Thursday, November 29. Plan to join us! You'll have fun, and you'll also help bring some cheer to the needy of the Twin Cities this holiday season.

Watch our website (www.loma-tc.com) for more information, or contact Paul Lindemann at plindemann@catholicaid.org.

A WORD ABOUT COSTS...

As a LOMA Society, we want to provide networking opportunities and programs that are of interest to Twin Cities insurance professionals. We also want to be good stewards of our members' dollars and provide quality programs at a reasonable cost.

I believe we are accomplishing these objectives. We have kept our membership dues level for a number of years. For dinner meetings, our goal has been to charge our cost for the meal and use our dues income to subsidize other meeting expenses, such as recognition gifts and speakers. We regret the need to charge a higher price for our upcoming meeting. Unfortunately, the increased prices of oil and corn have had a rippling effect on the economy, since one or both of these items have an impact on most of the products we all use. I want to assure you that we are continuing our long-standing practice of charging a "break-even" price for our dinner meetings.

Thank you for your understanding. As always, please feel free to discuss questions or concerns about our programs with any board member.

Paul Lindemann, President
LOMA Society of the Twin Cities

NEW DESIGNEES

Congratulations to the Twin Cities insurance professionals who earned new LOMA designations over the past year (since September 1, 2006).

AAPA

Allianz Life

Paul Brock
Renee Klemetsen
Amber Miller
Lori Morrin
Yuliya Navasialetskaya
Brian Stewart
Elaine Theis
Paul Vessel

Securian Financial

Ann Dooley
Laura Johnson

TATA Consulting Services

Shenbaga Muniappan

ACS

Allianz Life

Scott Allen
Stephanie Arnevik
Jason Busch
Jessica Combs
Terri Dauplaise
Lori Engen
James Green
Michele Hanson
Dale Jones
Ronald Larson
Philisha Lockhart
Jianchun Meng
Rachel Moen
Andrea Naples-O'mara
Yuliya Navasialetskaya
Michael Piper
Greta Rath
Rich Sames
April Sazama
Scott Schueller
Pete Schulte
Lori Stasik
Ann Strasser
Thomas Winn
Johnathan Yarger

Catholic Aid Association

Guiselle Knox
Anne Randazzo

Church Mutual

Joleen Zychowicz

Clark Consulting

Alyssa Bauer
Rebecca Washington

Cognizant Technical Solutions

Arun Pillai

Federated Life

Thomas Edstrom
Gwen Jacobson
Patricia Johnson
Larae Kubista
Debra Singelstad
Karen Stenzel
Kathy Stern
Julie Stiernagle
Marcia Willcox
Maryll Willcox Krejci

Hartford

Nathan Anderson
Jessica Betzel
Elizabeth Bornhoeft
Rebecca Bowman
Michael Flanders
Madelyn Fletcher
Bruce Fordahl
Holly Grangroth
Valorie Horton
Donald Laney
Ann Maddaus
Patricia Martin
Sally Neverman
Cathie Orth
Kara Sloneker
Michael Spark
Jordan Wilhelm

ING

Julie Carter
Pamela Roberts

Liberty Life

Lisa Barnett
Kathleen Goetsch

Mutual of America

Joseph Lenartz

New York Life

Karen Jurgensen

Securian Financial

Paula Dicke
Kim Kallestad
Carol Linde
Brian Powers

Sentry Insurance

Melissa Barden

Thrivent Financial

Sethu Rao
Deborah Schmalz
Jeremy Topolski

Transamerica Occidental Life

Jason Metcalfe

AIAA

Allianz Life

Carol Dunn
James Green
Christina Larson
Bee Lim
Philisha Lockhart
Jianchun Meng
Yuliya Navasialetskaya
Sara Ose
Corinna Price
Michaela Shirk
Brian Stewart
Paul Vessel
Johnathan Yarger

Clark Consulting

Andrea Willenbring

Hartford

Lori Angeli
Megan Bartell
Ann Maddaus
Lucille Osier
Carl Roehl

Sentry Insurance

Carla Zalewski

Thrivent Financial

Candace Wolf

NEW DESIGNEES (continued)

AIRC

Allianz Life

Jessica Combs
Carol Dunn
Jianchun Meng
Cecilia Mische
Yuliya Navasialetskaya
Michelle Sharp
Brian Stewart
Paul Vessel

Hartford

Lori Angeli
Amy Edgren
Ann Maddaus

Securian Financial

Kevin Jacobson
Terry Teske

Thrivent Financial

Brian Picard

FFSI

Allianz Life

Paul Brock
Gregory Ehram
Renee Klemetsen
Amber Miller
Cecilia Mische
Lori Morrin
Yuliya Navasialetskaya
Mary Rausch
Brian Stewart
Paul Vessel
Aaron Voyles

Ameriprise Financial

Stephen Peterson

Hartford

Kathleen Earley
Heather Jerome
Christopher Moore
Alex Schmidt
Mary Smythe

New York Life

John Stendahl

Securian Financial

Anna Antus
Gero Feaman
William Komp II
Stephanie Roy

Thrivent Financial

Joni Klonecz
Senthil Meenakshi
Sundaram

FLMI

Allianz Life

Scott Allen
Barbara Braun
Linn Drury
Diane Lobbestael
Aaron Mastrian
Jianchun Meng
Cecilia Mische
Yuliya Navasialetskaya
Brian Stewart
Paul Vessel
Darlene Wolverton

Ameriprise Financial

Rheanne Macomb

Assurant Health

Marika Mataitis

Federated Life

Thomas Bendorf

Hartford

Lori Angeli
Lisa Claussen
Joel Frazer
Rayna Herman
Sheryl Huber
Patricia Martin
Christopher Moore
Roger Vigar

HCC Benefits Corp.

Felicia Toohey

Securian Financial

Paul Casey
Steven Porter
Nina Rhines

Thrivent Financial

Mona Luthra
Cara Oelke

PCS

Allianz Life

Deja Diop
Angela Heyne
Bee Lim
Aaron Mastrian
Amber Miller
Cecilia Mische
Andrea Naples-O'mara
Yuliya Navasialetskaya
Mary Rausch
Brian Stewart
Ryan Thorman

Ameriprise Financial

Brent Hodgeman

Assurant Health

Melissa Fransen

Catholic Aid Association

Amy Soderquist

Federated Life

Sara Weber

Hartford

Terry Ballis
Amy Edgren
Heather Jerome
Donald Laney
Angie Weller-Jackson

**Congratulations to all new
LOMA designees!**

SPRING SEMINAR RECAP

The LOMA Society of the Twin Cities (Minneapolis and St. Paul) held its Spring Seminar on Tuesday, May 15, at the Catholic Aid Association auditorium in Arden Hills, Minnesota. Following a scrumptious breakfast buffet, Society President Paul Lindemann welcomed all attendees. He also recognized the Company Representatives and Educational Representatives for all the work they do for LOMA and our Society. Each Educational Representative and Company Representative in attendance received a pen made by T.L.C. Toys, a local non-profit organization that makes toys for needy children. Paul shared with us the story of T.L.C. Toys and its founder, Mel Hartman.

Michael McGovern, President and Chairman of the Catholic Aid Association, welcomed the attendees to the seminar and to the newly renovated meeting rooms. The Catholic Aid Association welcomed the Society most hospitably.

Paul next introduced David Parr, Director of Business Development for LOMA. David gave us an overview of LOMA's history, its mission, and its goals for itself and its member companies. David also shared with us the many resources, benchmarking tools, research data, information, and surveys LOMA offers its members.

David Parr introduced Kelly Anderson, an Associate in LOMA's Business Development area. David explored the phenomenal growth of e-learning and both its benefits and limitations. He reviewed the consequences of e-learning on the financial industry and country, in both the business world and the education world.

While David verbally walked us through the LOMALearn website, Kelly clicked us through. We were shown how to register for a class, how to manage an account, and how to bookmark a location. She also showed us some example questions for LOMA 280.

After a short refreshment break, LuAnn Maxfield introduced Sue Veazie and Leah Trumper, representatives for Ready for Success, a non-profit organization that provides low income women in the Twin Cities with personal presentation suggestions, as well as clothing and accessories suitable for job interviews and the workplace. Sue and Leah spoke about the work, preparation, and devotion given to their clients, as well as how the donations are utilized to benefit our community. Our members donated over \$100 in cash and clothing to the organization that morning.

Dixie Carroll introduced the Compliance Roundtable members. Susan Klasen Albrecht, JD, CLU, Vice President, General Counsel and Chief Compliance Officer with the Catholic Aid Association, spoke about how fraternal insurance companies are organized and some of the compliance issues they face.

Mark Raiser, Compliance Officer with RiverSource Distributors, Inc., spoke about market conduct compliance with an emphasis on replacement regulations. He reviewed how oversight, tracking, trending, and sampling are leveraged to monitor compliance.

Dixie Carroll, JD, FLMI, AIRC, Compliance Director with RiverSource Distributors Inc., spoke about the Market Conduct Continuum. Dixie focused on market analysis, market conduct annual statements, market conduct profile, market conduct survey, and market conduct examination. She gave examples of triggers for examinations, such as a change or shift in business practices.

2007 Board of Directors

Ann Buffie, President of Ann Buffie & Associates, Inc., shared with us her knowledge and experience with the Insurance Marketplace Standards Association (IMSA). IMSA is a nonprofit, independent organization that sets the ethical standards for the sale of individual life, annuity, and long-term care insurance. Ann's organization conducts unbiased compliance reviews and provides strategies to build a framework for compliant procedures and processes.

After a refreshment break, Paul Lindemann introduced the Twin Cities LOMA Society Board of Directors. Lori FitzPatrick, Secretary and Education Chair, reviewed the LOMA Society of the Twin Cities Scholarship Program requirements for application. A request was made for applications to review.

The seminar's closing speaker, Lisa Wendt, Professional Organizer, provided steps to de-clutter the home, home office and office. The three steps addressed were the physical clutter, the psychological clutter and the combination psycho-physical clutter.

The hurdles with physical clutter were becoming organized: having the adequate storage, using the right containers or furniture, organizing hand tools such as "to do lists" with deadlines, timers. Calendars and label makers and doing something with the nameless items. Even how you organize a filing cabinet can be a hurdle with Lisa suggesting an alphabetical system by categories and subcategories.

The psychological clutter can keep you from becoming organized. Lisa stated if you don't evaluate the psychological clutter, the physical clutter is never going away. Is there a sentimental attachment, a comfort level with quantities, unclear goals or priorities, a fear of organizing, a need for control or perfectionism or simple stubbornness? Evaluating these factors leads to becoming physically organized.

And finally, there is the psycho-physical clutter. Analyzing the need to change with your lifestyle, different personalities you'll find there is no right way. Organize what you can control, take time to make time, start with small time frames and set priorities. Focus on the results and with patience and time you'll be organized – or you can hire a professional organizer.

**Paul A. Lindemann, President
Past President (1999)
FLMI, ACS**

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FLMI, ACS, FALU**

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**Lori FitzPatrick, Secretary/Education
Chair**

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**Rolf T. Anderson,
Treasurer/Nominating Committee
Chairperson**

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Chairperson**

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