



FELLOW TALK

April, 2010

A Message from Our President

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LuAnn Maxfield, President
FLMI, ACS, FALU

Bang for your Buck

No, it's not a hunting phrase. But it is a phrase that has been resurrected and heard often lately. I don't know of anyone who isn't concerned about getting a bang for their buck or the most out for the cost. Let's consider the bang or the value.

So what value does LOMA or the LOMA Society of the Twin Cities bring to their members?

LOMA

- ✦ A new approach to learning; the Course Portal. Flexible Choice - Learners choose the format of course content (online or in print). Improved learning and exam performance. Simplified purchase process. Courses available growing from LOMA 281 – Meeting Customer Needs with Insurance and Annuities and LOMA 291 – Improving the Bottom Line: Insurance Company Operations to LOMA 320 – Insurance Marketing and LOMA 361 – Accounting and Financial Reporting in Life Insurance Companies. (Visit LOMA.org for more details and more courses to come in 2010 and 2011.)
- ✦ Custom Learning Paths. LOMA works with your HR and Education Departments to create and develop "Custom Learning Paths" education programs tailored to meet your company's needs.
- ✦ A professional networking site is being set up.
- ✦ "Need to Know" courses as a part of designation programs. "Need to Know" courses are offered through the Course Portal and are a part of FLMI, ACS, AIRC, PCS, AIAA and ARA designations.
- ✦ "Lunch 'n Learn" sessions at your company. (Contact LuAnn Maxfield of the local Society for more details.)

LOMA Society of the Twin Cities

- ✦ Opportunities for continuing industry education. A library of course material has been established. (Contact Genevieve Stadler of Prudential for more details.)
- ✦ Venues for professional growth and networking.
- ✦ Seminars and Dinner Meetings of current industry issues, career development, motivation, health and wellness.
- ✦ Community involvement (giving back) in worthy not for profit organizations. (Emergency Foodshelf Network & related donation collection through the Holidazzle Parade, Ready for Success, Dragonfly Project, Kids Cancer Fund just to name a few.)
- ✦ Sponsor a \$500 scholarship for post-secondary education. Eligible candidates are members in good standing, their children, grandchildren or spouse.
- ✦ A website full of interesting information (recap of past meetings, job postings, scholarship information, current, past and future events, links to Twin Cities Life and Health Claims Association, LOMA.org, calendar of events, conferences, workshops and seminars.)

"So if you are a member, don't miss out on using the value for your membership; whether it is on the global or the local level."



*Memorial Day
Monday, May 31, 2010*

So if you are a member, don't miss out on using the value for your membership; whether it is on the global or the local level. Or if you want to become a member, we welcome you. Come join us at the Spring Seminar. See you there!



2010 Half Day Spring Seminar Tuesday, May 18, 2010

Mark your calendars:

April 27-29

Health Underwriting Study Group

San Antonio, TX

April 28-30

LIC Annual Meeting

Atlanta, GA

May 16 – 19

LOMA Financial Inforum

Bonita Springs, FL

May 18

LOMA Society Spring Seminar

Thrivent Financial

May 24-26

ACCORD LOMA Ins Systems Forum

Las Vegas, NV

June 2-4

Customer Service Conference

Orlando, FL

June 10

LOMA Canada Annual Conference

Toronto, Canada

September 12-14

LOMA Annual Conference

Las Vegas, NV

September 22-24

DI & LTC Insurers Forum

Orlando, FL

Location: Thrivent Financial for Lutherans
625 Fourth Avenue South
Minneapolis, MN 55415-1624

- **Parking instructions and a Minneapolis skyway map are separate attachments**

Cost: Members - \$25
Non-members - \$35

Program:

8 – 8:30	Registration and Breakfast Buffet
8:30	“Regulatory Issues Affecting the Industry” Speaker, Rochelle LeTourneau
9:10	Charitable Organization, Ready For Success
9:25	Break for cookies, bars and soda
9:40	“Life Insurance Strategies” Speaker, Steve Nieno, Ameriprise Financial
10:20	“Charitable Giving” Speaker, Dana Erickson, Thrivent Financial
11:00	“Thrivent at Home” Speaker, Jill Deuel, Thrivent Financial
11:45	Door prizes

Charity: Ready For Success

Breakfast Buffet: Scrambled Eggs
Hash Browns
Bacon/Sausage
Fresh Fruit
Muffins, pastries, bagels and cream cheese
Coffee, juice and tea

Ready For Success (RFS) provides low-income individuals with new or gently used professional clothing, accessories and personal care items suitable for job interviews and the workplace. RFS is excited to serve both men and women in the Twin Cities area. The men’s and women’s programs each have two locations, one in Minneapolis and the other in St. Paul.

Needs include:

- Clean and gently used professional and business casual clothing (includes suits, jackets, pants and shirts)
- Shoes, belts, ties or scarves
- Personal hygiene products such as shampoo, conditioner and soap
- For the men’s program, there is a demand for clothing in “big and tall” and “small and slight” sizes

Spring Seminar Speakers

- **Rochelle LeTourneau - "Regulatory Issues Affecting the Industry"**



Rochelle LeTourneau is currently acting as a consultant in the regulatory and government affairs area of insurance regulation. She formerly served as director of state government affairs for Ameriprise Financial, Inc. and at ING as manager in state government relations. Prior to working in the financial services industry, she was with the Minnesota Department of Commerce. In her capacity as deputy commissioner she had overall responsibility for the supervision of domestic and foreign insurance companies doing business in Minnesota.

As a regulator and industry representative, Rochelle LeTourneau has been actively involved with many committees of national and state trade associations including the NAIC, ACLI and PCI, working on regulatory issues and development of model laws; a variety of boards and commissions including: Advisory Board to the Insurance Chair, Carlson School of Management; Austin Human Rights Commission; Minnesota Governors Drought Task Force; Minnesota Rural Finance Administration. She has served as Vice-Chair of the Board of the Minnesota Life and Health Guaranty Association and as a board member of the South Dakota Life and Health Guaranty Association.

- **Dana Erickson, Thrivent Financial for Lutherans – “Charitable Giving: How to Make a Difference by Giving Back”**



Dana Erickson, ChFC , FIC, CLTC, is a senior financial advisor with the North Oaks Group, a Thrivent Financial team of financial representatives serving members in the Twin Cities area. Dana is a 12-year veteran of the financial services industry. Her first priority is helping individuals reach their financial goals by providing them with professional, personalized service to make informed decisions. Dana will be speaking on how one can use their time, talents and treasures to make a profound impact on the organization they care about most.

Spring Seminar Speakers (Continued)

- **Steve Nieno, Ameriprise Financial, - "Life Insurance Strategies"**



Steve Nieno, JD, is Director of Advanced Strategies for RiverSource Insurance at Ameriprise Financial. Steve brings a wealth of experience to this role with financial services industry experience dating back to 1993. Prior to joining Advanced Strategies, he was a Product Distribution compliance officer for RiverSource Distributors. In this role he supported the Insurance team with compliance oversight by building key relationships.

Steve will be talking on the use of life insurance as a tool in estate planning, business planning, charitable giving and other "high net worth" client scenarios.

- **Jill Deuel, Thrivent Financial for Lutherans – "Thrivent at Home"**

(Photo not available.)

Jill Deuel has been with Thrivent Financial for 16 years. After 13 years in the organization's Information Technology department, she was recruited to join a team charged with launching Thrivent Financial at Home -- a program aimed at helping people achieve financial balance. In her role as leader of Recruiting and Development for Thrivent Financial at Home, she is responsible for the program's financial guides -- individuals who lead Thrivent Financial at Home gatherings and work closely with clients to address their financial needs. As a financial guide herself, Jill is enjoying the challenges and rewards of making a positive difference in the lives of her clients. Her topic: How Thrivent Financial serves the mass market - bringing core financial advice to those who are otherwise under-served.



2010 Scholarship Program Guidelines

Amount: One \$500 Scholarship will be awarded

Eligible Students: LOMA Society members, or a child, grandchild, or dependent of either:

- A LOMA Society of the Twin Cities member in good standing, OR
- A new FLMI eligible for membership in the LOMA Society of the Twin Cities (designation earned prior to submission deadline of June 30, 2010)

Requirements:

1. Money to be used toward the post-secondary education program (post-high school) of the eligible candidate. Student may be an accepted first year or continuing student. (Photocopy of letter of acceptance or attendance may be requested for verification).
2. Student will submit a statement of personal goals OR a development plan that demonstrates how they will utilize their educational achievements.
 - Typewritten, not to exceed one page
 - Double spaced, 12 point type font or larger, margins 1" or wider
3. The following criteria will be used to evaluate the merits of the essay:
 - Clear Academic Focus
 - Concise Professional Focus
 - Dedication to Educational Pursuit
4. The member will also submit a statement of how their LOMA educational achievements or society membership have helped them personally in their career or interactions with others.
 - Typewritten, not to exceed one page
 - Double spaced, 12 point type font or larger, margins 1" or wider
5. No Grade Point Average eligibility requirement, other than proof of acceptance or regular attendance at an institute of post-secondary education.

The LOMA Society of the Twin Cities will retain the full ownership right to all scholarship submissions and may, at their discretion, share excerpts in future newsletters, publications, or society events.

Submission Deadline:

All application materials, attached to a copy of these Guidelines, must be submitted to a Board Member of the LOMA Society of the Twin Cities **NO LATER THAN June 30, 2010** (time extensions will not be granted).

Applicant Name

Member or Associate Member Name and Company

Member Address and Daytime Telephone Number

Date Received By/LOMA Society Board Member Name

2010 LOMA Twin City Board Members

LuAnn Maxfield, President, FLMI, ACS, FALU
Hartford Life
(763) 255-7390
luann.maxfield@hartfordlife.com

Dixie Carroll, Vice President & Society Committee Rep, FLMI, AIRC,
ACS
Ameriprise Financial Services, Inc.
(612) 678-4177
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Genevieve Stadtler, Past President & Education Chair, FLMI, ACS,
AALU
Prudential Financial
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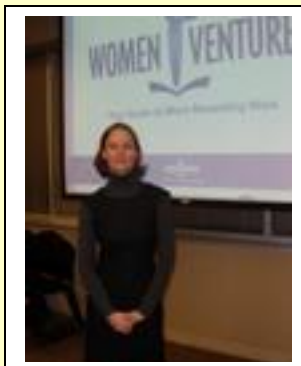
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Catholic Aid Association
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arandazzo@catholicaid.org

Michaela Voor Vart, Member at Large, FLMI, ACS
Ameriprise Financial Services, Inc.
(612) 678-7580
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2010 Winter Dinner Meeting Recap



Christine Huff



LuAnn, Donna, Rolf

LOMA Society of the Twin Cities Holds Winter Meeting

The LOMA Society of the Twin Cities of Minneapolis and St. Paul held its Winter Meeting on March 2 at Hartford Life in Maple Grove. Following a buffet dinner, Society President LuAnn Maxfield welcomed the attendees and conducted a brief business meeting. This included recognizing Donna True, education representative for New York Life Insurance Company, for her many years of service as she is retiring.

The evening's keynote speaker was Christine Huff, MBTI Certified, from WomenVenture. WomenVenture is a non-profit economic development organization that serves both women and men, but its mission is helping women become more economically successful and prosperous. Christine engaged the audience with "Networking - What's the Buzz About".

Christine shared that networking is really the exchange of information and that we do this daily. An astounding 70-80% of jobs are found through networking. The reasons to network vary, but include seeking a job, building a client base, offering expertise, staying current on trends, finding people with common interests, or just for the fun of it!

We learned that to be effective at networking there are many things you need to recognize. They include:

- Know what you want to get out of networking (the purpose)
- Know what you have to offer
- If you are an extrovert or an introvert
- Effective networking is about relationship building
- Get to know the person you're talking with first and then conduct 'business' only if it makes sense
- Think of what you can offer the person you've connected with
- Pay attention to the handshake, make eye contact, and SMILE
- Bring business cards and be sure to write notes and dates on the back so you can follow-up
- Set aside time for follow-up later (critical step)

After sharing this insightful information on networking and having us realize how we use this skill in everyday life, we concluded the session by practicing our networking skills on something that was important to us, such as a hobby. The information we learned showed us that networking is fun!

At the conclusion of the winter meeting information was provided about our collection for Cancer Kids Fund, door prizes were awarded and the Society's upcoming Spring Seminar on May 18, 2010 was announced.



**LOMA Society of the Twin Cities
Half Day Spring Seminar**

Tuesday, May 18, 2010

Registration & Breakfast Buffet 8-8:30 AM, Seminar Presentations 8:30 AM – 12 PM
Speakers: Rochelle LeTourneau, Consultant, "Regulatory Issues Affecting the Industry"
Steve Nieno, Director of Advanced Strategies, RiverSource Insurance,
"Life Insurance Strategies"

Dana Erickson, Senior Financial Advisor, Thrivent Financial for Lutherans,
"Charitable Giving: How to Make a Difference by Giving Back"
Jill Deuel, Leader, Recruiting & Development, "Thrivent At Home"

Location: Thrivent Financial for Lutherans
625 Fourth Avenue S.
Minneapolis, MN 55415

Please respond by Tuesday, May 11, 2010 to:
Claudia Wiebold (B0-3032)
Securian Financial Group
400 Robert Street North
St Paul, MN 55101
Phone: (651) 665-3032
Fax: (651) 665-4666
E-mail: claudia.wiebold@securian.com

LOMA Society Spring Seminar

Fee: \$25 members
\$35 non-members

Company Name (if applicable): _____

Name: ** _____ member ___ non-member

Designation(s): _____

Please submit this form and a check payable to LOMA Society of the Twin Cities to the above address by Tuesday, May 11th. Thank you.

**Company Reps: Please submit this form with table of attendees (next page) to the address above by Tuesday, May 11th. Send check payable to LOMA Society of the Twin Cities to the above address by June 1st. Thank you.

