



FELLOW TALK

February, 2011

A Message from Our President

Inside This Issue

- 1 **President's Message**
- 2 **Winter Meeting Agenda**
- 3 **Keynote Speaker, Bill Gould**
- 4 **President's Summary**
- 4 **2010 Treasurer Report**
- 5 **Fall Recognition Meeting Recap**
- 5 **2011 Society Board Members**
- 6-7 **Winter Meeting Registration**

"LOMA Society of the Twin Cities provides educational support, professional development and networking opportunities for financial services professionals."



Dixie Carroll, President
FLMI, AIRC, ACS

Welcome returning members, colleagues and new designees! I am excited about the events and seminars the Society has planned in the upcoming year and sincerely hope that we will see you at one or several of them.

As we embark upon the new year, I think it is important to reflect on our mission: LOMA Society of the Twin Cities provides educational support, professional development and networking opportunities for financial services professionals. As we continue to recover from the economic downturn and its impact on the financial services industry, we see that our mission is important and relevant now more than ever.

This year's events will provide an array of speakers and activities that will address the current state of the insurance and financial services industries and what employees can do to ensure they are providing value to their current employers, as well as make them attractive as candidates to potential employers. The LOMA Society of the Twin Cities believes that one way individuals can maintain their marketability is by obtaining the FLMI designation or one of the many other professional designations offered through the National LOMA organization. The past couple of years have brought many challenges to our industry and the economy as a whole. Now, more than ever, personal marketability is vital to individuals in order to survive potential organizational cutbacks and downsizing. The Society continues to recognize the importance of networking with colleagues working in the Twin Cities insurance market and is proud to provide a forum for its members to meet face-to-face.

The focus of our Winter Dinner Meeting, to be held on March 8th, is "Forecast 2011". It promises to be an engaging event. Thanks to Securian for graciously agreeing to host this event. See details later in this Newsletter.

As always, we welcome your input and feedback and look forward to working with you as we face the challenges of 2011 together!



Valentine's Day
Monday, February 14, 2011

LOMA Society of the Twin Cities Winter Dinner Meeting

AGENDA

Date: Tuesday, March 8, 2011

Location: Securian Financial Group
400 Robert Street North
Saint Paul, MN 55101
Parking in 401 Building for \$2
(\$1 bills or quarters preferred)

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

Charity: Emergency Foodshelf Network

Program:

5:30	Registration & Social Hour
6:00	Dinner Buffet
6:45	Business Meeting
7:00	Keynote Speaker Bill Gould, CPA, CMA Securian Financial Group, Inc. 2 nd Vice President Individual Actuarial and Financial

Buffet: Pasta Bar – Top your own pasta with grilled chicken, Italian sausage, marinara sauce, meat sauce, Alfredo sauce, parmesan cheese and crushed red peppers
Caesar salad
Chef's vegetables
Bread sticks
Beverage
Assorted Mini Desserts

Speaker's Topic: "**FORECAST 2011**" –

From the January 2011 LOMA Resource magazine's cover story, Bill will speak to the questions asked in that article:

1. **SALES:** What is your prediction for sales, premiums and profits for our industry as a whole in 2011? What products look particularly strong or weak?
2. **ECONOMIC CLIMATE:** Do you see economic improvement in 2011? How will the industry respond to the economic situation – will there be consolidation, downsizing or something else?
3. **TECHNOLOGY:** What new technologies have the greatest potential to help our industry and how can they help?
4. **HUMAN CAPITAL:** How important is human capital to our industry and how can it be developed/improved?
5. **CUSTOMER SERVICE:** What is your company doing to assure top –quality customer service?

DIRECTIONS

Get to Highway 94 in St. Paul

From the west: Take Exit 242C toward 7th St.
Merge onto Wall St.
Turn right onto 6th St E.
Turn right onto Minnesota St.
Turn right into ramp doors near center of building.

From the east: Take 6th St, Exit 242D, on the left toward US 52.
Take 6th St exit on the left.
Stay straight to go onto 6th St E.
Turn right onto Minnesota St.
Turn right into ramp doors near center of building.

Our Charity: **Emergency Foodshelf Network**

We will be accepting donations (cash or non-perishable items) to the Emergency Foodshelf Network. The Emergency Foodshelf Network (EFN) is a nonprofit food bank that collects, warehouses and distributes quality food and essential services to Minnesota hunger relief organizations. Today, EFN's network consists of nearly 200 hunger relief programs throughout 35 Minnesota counties. These agencies provide more than 7 million pounds of nonperishable, perishable and prepared food to hunger relief organizations annually. For every dollar donated, EFN pours 92 cents directly back into its' programs, making it one of the most efficient organizations in the Twin Cities.

2011 Winter Meeting Keynote Speaker



William M. Gould

CPA, CMA

Securian Financial Group, Inc.

2nd Vice President

Individual Actuarial and Financial

Responsibilities

Bill joined Securian in 1995 in the Financial Reporting Accounting Department. He became an Assistant Account Analyst in the Accounting Department in 1996. His financial responsibilities included completing financial statements for subsidiaries, statutory, and GAAP reporting.

In 2000 Bill moved to the Strategic Business area where he was promoted to a Business Development Coordinator and then a Manager, Business Development in 2003. Within the Business Development unit, Bill worked on acquisition and divestiture activities. These included: the sale of individual disability insurance to The Standard; Minnesota Life's partnership with Waddell and Smith, and the acquisition of Allied Solutions.

Bill transferred to the Individual Division in 2006 upon his promotion to Director, Individual Financial. His responsibilities were expanded to include Individual Actuarial. In February of 2008 he was promoted to 2nd Vice President. Bill serves as the Chief Actuarial Officer for the Individual Division, which includes, Securian Advisory Services; Securian Financial Services; and, the Individual Life Insurance Manufacturer. Bill is also responsible for Individual Life Insurance Development.

Education

Bill has a Bachelor of Science in Accounting and a Master of Business Administration from the University of Minnesota. He has also earned his CPA and CMA designations.

2010 Fall Recognition Meeting Recap

The LOMA Society of the Twin cities of Minneapolis and St. Paul held its Fall Recognition Dinner for new LOMA designees on October 5, 2010 at Radisson Plaza in Minneapolis MN. Following dinner Judy Schott, Assistant Vice President of LOMA's Business Development Department, shared with us details on "LOMA - The Trusted Source for Industry Knowledge".

There is a vast array of information available through LOMA to provide continuous learning opportunities. The training sessions available include shorter sessions that provide concise information that ultimately increase productivity. LOMA has evolved over time since being founded in 1924 and a recent example of this is the merger of LOMA and LIMRA in 2008. Go to loma.org to check for yourself on the offerings that are available.

Following Judy's talk, new LOMA designees were recognized and congratulated for their important achievements. Designees received a pin associated with their designation and a rose. Donations were accepted for Junior Achievement as part of the Society's ongoing charitable activities.

2011 LOMA Twin City Board Members

Dixie Carroll, President
FLMI, AIRC, ACS
Ameriprise Financial Services, Inc.
(612) 678-4177
dixie.carroll@ampf.com

Julie Printz, Vice President & Program Co-Chair
FLMI
Thrivent Financial for Lutherans
(612) 844-8372
julie.printz@thrivent.com

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

Leah Reckin-Mahoney, Secretary
FLMI, PCS
Securian Financial Group
(651) 665-3669
leah.reckin-mahoney@securian.com

Claudia Wiebold, Treasurer & Program Co-Chair
FLMI/M, ACS
Securian Financial Group
(651) 665-3032
claudia.wiebold@securian.com

Rolf T. Anderson, Membership & Scholarship Chairs
FLMI, FFSI, ACS, AIRC
New York Life Insurance Company
(952) 885-1229
rolf_t_anderson@newyorklife.com

Barb Prinz, Communication Chair
FLMI, AIRC, ACS
Ameriprise Financial Services, Inc.
(612) 678-7259
barbara.x.prinz@ampf.com

Genevieve Stadtler, Education Chair
FLMI, ACS, AALU
Prudential Financial
(763) 519-2435
genevieve.stadtler@prudential.com

Michaela Voor Vart, Society Committee
Representative
FLMI, ACS
Ameriprise Financial Services, Inc.
(612) 678-7580
Michaela.K.VoorVart@ampf.com

Anne Randazzo, Member at Large
ACS
Catholic United Financial
(651) 490-0170
arandazzo@catholicunited.org



**LOMA Society of the Twin Cities
Winter Dinner Meeting
Tuesday, March 8, 2011**

Social Hour: 5:30 pm Dinner: 6:00 pm Speaker: 7:00 pm
Speaker: Bill Gould, Second Vice President – Individual Actuarial & Financial
Securian Financial Group, Inc.

Topic: FORECAST 2011

Location: Securian Financial Group
400 Robert Street North
St. Paul, MN 55101

Please respond by Friday, February 25, 2011 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 Winter Dinner Meeting

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 Fri, Feb 25. Thank you.

**Company Reps: Please submit this form with table of attendees (next page) to the address above by Fri, Feb 25. Send check payable to LOMA Society of the Twin Cities to the above address by March 22. Thank you.

