



FELLOW TALK

September, 2006

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Mark your calendars:

Recognition Dinner
Tuesday, Sept 26
Jax Cafe

LOMA Annual Conference
September 17 - 19
San Francisco

Holidazzle Parade
Tentatively
Thursday, Dec 7

2006 Recognition Dinner, Tuesday, Sept 26

Location

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

Cost

Member = \$35 / Non-Member = \$45

Agenda

- 5:30 Registration
- 6:00 Dinner
- 6:45 Elections and Business Meeting
- 7:00 Guest Speaker, Dean Polk
2nd VP, Education & Training, LOMA
- 7:30 Recognition Ceremony & Photos

Dinner

Soup du Jour
 Jax house salad
 Broiled filet mignon with bordelaise sauce, sautéed walleye or chicken kiev
 Garlic whipped potatoes
 Fresh vegetable
 Bread basket with butter
 Baileys chocolate Irish Cream torte
 Coffee, tea or milk

Guest Speaker

Dean Polk, 2nd VP, Education & Training, LOMA

Charity

Emergency FoodShelf Network

We will be accepting cash/check donations.
 Make checks payable to EFN.
 Thank you for your continued support.

Dean Polk, LOMA September 26 Guest Speaker

Keynote Speaker: Dean Polk, FLMI, ACS, ALHC, 2nd Vice President, Education & Training, LOMA

“The Changing Workplace Demographic”

The LOMA Society is pleased to announce that Dean Polk from LOMA's Atlanta headquarters will be the keynote speaker at the Fall Recognition Dinner. Dean will speak on the changing workplace demographic, including the impending baby boomer retirements, and what this will mean to financial services companies and those who work in this changing environment.

As the head of the Examinations Department, Dean's responsibilities include overseeing the development and administration of all testing products for LOMA's education programs. Dean has been with LOMA since 1988, beginning as an exam writer before joining the Association's management team in 1997. He served as the primary project manager for LOMA during the development of the Internet-based LOMANET/I*STAR system in the late 1990s. Dean is also closely involved with the ongoing implementation of LOMALearn Online, LOMA's e-learning platform.

2007 Officer Nominations LOMA Society of the Twin Cities Board of Directors

President, Paul Lindemann
Vice President, LuAnn Maxfield
Treasurer, Rolf Anderson
Secretary, Lori Fitzpatrick

Associate, Life Management Institute (ALMI) A New Level of Recognition for Insurance and Financial Services Professionals

ALMI and FLMI Award Structure:

Award	Designation	Requirements	Number of courses
Certificate	None	LOMA 280 + LOMA 290	2 required courses
Diploma	ALMI	Certif. + LOMA 356 + any 2 other required FLMI courses	+ 3 required courses
Diploma	FLMI	ALMI + remaining 5 required FLMI courses	+ 5 required courses

For more information on either of these new designations, visit
www.loma.org
www.lomanet.org

Associate, Financial Services Institute (AFSI) A New Level of Recognition for Financial Services Professionals

AFSI and FFSI Award Structure:

Award	Designation	Requirements	Number of courses
Certificate	None	LOMA 286 + LOMA 305	2 required courses
Diploma	AFSI	Certif. + LOMA 356 + any 2 other required FFSI courses	+ 3 required courses
Diploma	FFSI	AFSI + remaining 5 FFSI requirements (includes PACs)	+ 5 requirements

Spring Seminar Recap

The LOMA Society of the Twin Cities held its Spring Seminar on May 10 at the Zuhrah Shrine Center in Minneapolis. Attendees enjoyed a breakfast buffet followed by three outstanding speakers.



Brian Peterson, CSA, CLTC, Senior Vice President and National Sales Manager, Allianz Life Insurance Company of North America, spoke on "Long Term Care (LTC) Insurance: Debunking the Myths." He discussed common misconceptions such as believing LTC is too expensive and only nursing home insurance. He described the variety of services that LTC can cover such as assisted living facilities and home health care. But Brian stressed the importance of carefully selecting LTC policy features such as benefit periods and amounts in order to provide appropriate and affordable coverage. He emphasized the need to plan for long term care to ensure that future generations of retirees are able to meet their health care needs.



Deputy Commissioner Patrick Nelson of the Minnesota Department of Commerce discussed current issues facing the insurance industry as well as several specific issues impacting Minnesota. He described the department's responsibilities of regulating all insurance companies and agents doing business in the state, monitoring each company's financial status, analyzing and approving all policies, investigating consumer complaints, and reviewing and approving companies' requests for rate increases and any new product offerings. He noted that the state has expanded its electronic capabilities, which has expedited filings and licensing. Deputy Commissioner Nelson also discussed a proposal for a uniform suitability model, the federal regulation of insurance, the controversy over equity indexed annuities, and the increasing need for capital protection products as the number of defined benefit plans decrease.



Denise K. Pederson, a professional development coach, invited us to "Ask the Right Questions" in order to make our communication more effective. She discussed how our verbal communication is often filled with unintentional generalizations and distortions. She described how to listen in a flexible, supportive way and to ask more precise questions in order to create more meaningful communication. Denise noted how the words and language we use can help us achieve our goals. She commented that effective communication can provide very practical results, such as cutting meeting time in half.

Donations were also collected for "Ready for Success," an organization that helps women returning to or entering the work force who might not be able to afford proper business attire. Sue Veazy, the organization's director, described how each client receives assistance in assembling a complete business outfit. She noted that "Ready for Success" increases the confidence and self-esteem of each client as they start their new careers.



Have a safe and happy
Labor Day weekend.

New LOMA Designees

Congratulations to the following individuals who achieved new LOMA designations!

FLMI

Hallie Anderson, Allianz
 Dorie Bekker, Sentry Insurance
 Geoffrey Boehm, Hartford
 Brian DeBauche, Thrivent
 Beth Eberbach, Mutual of America
 Christopher Funk, Securian
 Neil Gonzales, Allianz
 Lynne Grey, Hartford
 Jodi Johnson, Assurant
 Cheryl Lautenbach, American Medical
 Carol Linde, Securian
 Dawn Oswskey, Hartford
 Michael Pohl, Allianz
 Steve Potvin, Allianz
 Brian Powers, Securian
 Brad Quello, Allianz
 Stephanie Roy, Minnesota Life
 Rich Sames, Allianz
 Scott Schueller, Allianz
 Darcy Senst, New York Life
 Janelle Teachout, Allianz
 Dale Tinglestad, Allianz
 Cherie Wesa, American Medical
 Robert Wider, Securian
 Bernadette Zasada, Hartford

FFSI

Mary Beth Assad, Allianz
 Steven Brown, Thrivent
 Elizabeth Fluegel, Allianz
 Kathryn Zettler, Securian

ACS

Kerry Adelman, Allianz
 Juanita Atkinson, Hartford
 Rolf Baglien, Allianz
 Ryan Bernard, Allianz
 Brenda Blouin, Federated Life
 Chad Brown, Allianz
 Rebecca DeCamp, Ameriprise
 Donna DeLorenzo, Allianz
 Meggan Dickinson, Allianz
 Deja Diop, Allianz



ACS

Linn Drury, Allianz
 Jackie Earls, Allianz
 Amy Edgren, Hartford
 Gregory Ehrsam, Allianz
 Ryan Erickson, Securian
 Karrie Gontzke, Hartford
 Erin Hadrits, Allianz
 Catherine Hall, Federated Life
 Linda Hart, Prudential
 Mark Heupel, Federated Life
 Teresa Joseph, Allianz
 Angela Kempfer, Allianz
 Jane Keller, Federated Life
 Tracy Kingery, Federated Life
 Andrew Kisielius, Allianz
 Christina Larson, Allianz
 Bee Lim, Allianz
 Mary Marth, Allianz
 Aaron Mastrian, Allianz
 Toni Mattwig, Allianz
 Cecilia Mische, Allianz
 Sarah Munn, Allianz
 Rita Pauling, Federated Life
 Cynthia Paver, Allianz
 Elizabeth Pinegar, American Med
 Rhonda Pirkl, Allianz
 Aimee Rath, Allianz
 Judith Roufs, Allianz
 Melissa Ryden, Securian
 Sara Steele, Federated Life
 Brian Stewart, Allianz
 Eric Swanson, Allianz
 Hugo, Tamez, Hartford
 Ryan Thorman, Allianz
 Dale Tingelstad, Allianz
 Paul Vessel, Allianz
 Jennifer Vetter, Securian
 Russell Walker, Allianz
 Charlene Wells, ING
 Andrea Willenbring, Clark Consult
 Carla Zalewski, Sentry Ins.
 Tracy Zimmermann, Federated Life

A Message from Our President



Rolf Anderson, FLMI, FFSI, ACS, AIRC
Assistant Vice President, New York Life Insurance Company

President's Message

As fall arrives in Minnesota, we approach what is perhaps our most important meeting of the year, the Fall Recognition Dinner. We're very pleased to have an opportunity to acknowledge all new LOMA designees and congratulate you for your impressive accomplishments. Your LOMA designation is internationally recognized around the world!!

We're also pleased to welcome you as a new member of the LOMA Society of the Twin Cities. The LOMA Society exists for you; recognizing your achievements, promoting professional growth by sponsoring educational events and activities, and providing opportunities to interact with colleagues in our industry. We look forward to your involvement!

We're also delighted to welcome the keynote speaker for the recognition dinner, Dean L. Polk, FLMI, ACS, FLHC, 2nd Vice President, Education & Training, at LOMA. It seems particularly fitting that a representative from LOMA will be here in person to participate in the recognition of our new designees. We're very grateful that Dean is able to be here for this very special event.

It's also time for our Society to elect new officers and welcome new board members. We're pleased to welcome Lori Fitzpatrick and Genevieve Stadler to the board. In fact, Lori had previously served on the board and we're happy to welcome her back. I would also like to thank our current board of directors for all the good work they do on behalf of the Society. They volunteer innumerable hours and handle a multitude of tasks ranging from organizing our educational events and charitable activities to creating the newsletter and managing our scholarship program. Their dedication to the Society is extraordinary!

I would also like to take a moment to express my sincere thanks for the opportunity to serve as the Society's president this past year. I've been pleased to work with LOMA in a new and rewarding way, and, most importantly, to strive to provide meaningful events for our members.

2006 Board of Directors

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LOMA Code of Professional Ethics The LOMA designee:

- Continually strives to master all aspects of his/her business;
- Discharges all duties with objectivity and fairness, applying standards of integrity and professionalism to the business environment;
- Holds his/her professional designation(s) proudly and seeks to enhance the reputation of the designation(s) in every way.