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# Fellow Talk

® SOCIETY OF THE TWIN CITIES

January, 2003

[www.flmi-tc.com](http://www.flmi-tc.com)

## A Message from the President



Mary Smythe, Twin Cities FLMI Society President

January 2003 is here, and it's time to start thinking about what you can do to make this a great year. The board members are busy planning some informative and fun activities for our Society this year, and we hope you will join us for one or more of them! Remember this is your society, so if you have any ideas for meeting locations, speakers, or topics you would like to hear about, please let any one of us know.

I'd like to thank Michael Orr, our Past President, for all the work he did for our Society in 2002. We're glad he will be continuing to help us out on the board this year as well. Jennifer Victor-Larsen has joined the board as our new Education Chairperson. Welcome Jennifer!

There has been a change from LOMA this year which will benefit our Society: LOMA has agreed that all associate degree holders can be full members of their local FLMI society, with the exception of being able to hold a board position. In the past, we have allowed associate members to come to 2 of our meetings, but now, they are welcome to all of our events! Please pass this news on to anyone you know who has an associate LOMA designation (ACS, AIAA, ARA etc.) and be sure they are on the FLMI Society distribution list at your company, as we'd love to have them come to our meetings and become a part of our Society.

I am excited about our first meeting of the year, as we are having a joint meeting with the Twin Cities Association of Home Office Life Underwriters. It will be held on THURSDAY, February 20, 2003 at Jax in NE Mpls. The speaker will be Mr. Gary Dunn, Assistant Vice President, and Manager of the Special Investigations Unit of Allianz Life. His topic is "Fraud", and he will touch on fraud in general, the new anti-money laundering laws, and personal identity fraud. This should be a very informative and worthwhile presentation for everyone. Please see the announcement in this newsletter for further details.

We will have our annual Spring Seminar in May, which will be a half-day, morning seminar at the Zurah Shrine Center in South Minneapolis. The board is working on a slate of informative speakers, so stay tuned to the next newsletter for more information.

Think snow..... think snow.....think snow.....think snow.....!!!

Mary Smythe, President, FFLMI Society of the Twin Cities

## Winter Dinner Meeting



**Date:** THURSDAY, February 20, 2003

**Location:** Jax Café  
1928 University Ave. NE  
Minneapolis  
612-789-7297  
JaxCafé.com

**Cost:** \$35

**Speaker:** Mr. Gary Dunn, FLMI, ALCH, ACS  
Assistant Vice President, Manager of the Special Investigations Unit  
Allianz Life Insurance Company of North America

Mr. Dunn will speak about Fraud, definitions and what to look for from the insurance perspective, the new anti-money laundering laws that are now in effect, and a general overview on personal identity fraud: what to look out for, how to protect yourself etc.

### **Agenda:**

4:30 – 5:30 Registration and Cash Bar  
5:30 – 6:15 Speaker, Mr. Gary Dunn  
6:15 – 6:30 FLMI Scholarship award presentation  
6:30 Dinner

**Dinner:** Soup du Jour / Jax House Salad

- Broiled Filet Mignon, bordelaise with sliced fresh mushrooms  
Chef's Fresh Vegetables  
Garlic Whipped Potatoes  
Jax Bread Basket  
Baileys Irish Crème Torte

- Vegetarian Pasta may be substituted. Please let your Company Representative know if you want this option.

**NOTE THIS IS A DIFFERENT DAY OF THE WEEK AND AN EARLIER TIME THAN USUAL.  
PLEASE PLAN ACCORDINGLY.**

*Reminder: This is a joint meeting with the Twin Cities Association of Home Office Life Underwriters.*

Please register with your company FLMI representative no later than Friday, February 14<sup>th</sup>.

**Congratulations!**  
**FLMI Class of 2002**  
**New FLMI's and Top ACS**



Pictured left to right: Laura Pietruszewski (Minnesota Life), Brian Helander (awarded Top ACS score) (Thrivent Financial for Lutherans), Andrea Polymeros (Minnesota Life) and Cherry Russell (Hartford).

### **October Meeting Recap**

**By Lori Webb, Treasurer**

For our October meeting, we met at a new destination, Little Jacks in Northeast Minneapolis! It was a nice change, and we used the evening to recognize four of our new FLMI's. Brian Helander from Thrivent Financial for Lutherans, Laura Pietruszewski, Minnesota Life, Andrea Polymeros, also from Minnesota Life and Cherry Russell, Hartford. We also noted that Brian Helander was one of the top students in 2002. Brian received recognition at LOMA's Annual Conference in Toronto, Canada, for achieving the highest ACS score. Brian is pictured and quoted in the December, 2002 issue of LOMA's Resource magazine.

Our speaker was Christopher Graham, Vice President and Chief Underwriter for the Individual Life Division of Hartford Life. This entertaining speaker spoke about making the most of your education and career. He said that it was important to further your education, so that you could 'give something back' to your workplace and community. Having continuing education allows one to "Make a Difference", as getting involved in further education allows you avenues to get involved in your industry and share your ideas and knowledge with others.

We also elected new officers, and presented the outgoing president, Mike Orr, with a thank you card and gift certificate for all of his hard work as president of the society for 2002. Food and \$74.00, collected from our generous fellows, was presented to the Emergency Food Shelf Network.

**FLMIs Walk in Holidazzle Parade,**  
**Collect for Emergency Food Shelf Network**

By Paul Lindemann, Member At Large

The evening of December 4 was perfect for getting in to the holiday spirit—temperatures in the 20's, no wind, and a few snow flurries. Nearly a dozen FLMI Society members and their families spent the evening as part of the Holidazzle Parade on the Nicollet Mall in downtown Minneapolis.

Holidazzle is an annual festival of lights, music and holiday cheer. This year, it ran each evening (except Mondays and Tuesdays) from the day after Thanksgiving to the Sunday after Christmas.

Wearing train engineer's overalls, our volunteers walked the eight-block parade route with the Cub Foods/American Express Circus Train, spreading cheer and collecting donations for the Emergency Food Shelf Network (EFSN).

Over \$31,000 was collected for EFSN during the 22 nights of the parade. American Express matched the first \$30,000 in donations, bringing the total to over \$61,000. This helped EFSN brighten the holiday season for many Twin Cities families.

Holidazzle was a great evening of fun and fellowship. We hope to see even more FLMIs come out next year!



**And the Winner is!**



Our October survey winner is Linda Johnson of Hartford. Congratulations!

\*\*\*\*\*We will be announcing our 2002 Scholarship winner at the February Dinner Meeting.\*\*\*\*\*

## **Activity Reports from 2002 Society Officers and Board Members**

### **Michael L. Orr, President**

This year as president I led a board of dedicated industry professionals as we carried forward a 27 year tradition of planning and presenting outstanding guest speakers and dinner meetings to our membership.

In 2002 our newsletter went entirely electronic and was expanded in content. Publishing and mailing fees, consequently, were saved. Our annual membership dues were decreased as a result, although to my personal responsibility being requested later than normal within the year.

Our board sponsored attendance to three up-and-coming board leaders who attended the annual LOMA conference in Toronto in September. 2002 also marked the third year of our educational scholarship to an eligible student pursuing post-secondary location.

In February at the Doubletree Hotel at the Mall of America, Dr. David Brueshoff, professor of parent education at Crown College, presented an outstanding overview of our response and proactive preparation for change in our lives.

At our Spring seminar in May held at the Zuhrah Shrine Center and Mansion, the Twin Cities FLMI Society presented an outstanding slate of speakers, listed as follows:

- Paul Barks, representative for Family Table and the mission to feed Twin Citians in need
- Gareth Hiebert, historian, former "Oliver Towne" and columnist for the St Paul Pioneer Press
- Laurie Kimball, MS speaking on organizational techniques and personal balance
- Suzanne Ketcham, Hartford Life HR specialist speaking on career building and resume skills
- Kaki Steen and Andy Massaro advocating professional speaking and Toastmasters International
- and our keynote speaker, Jill Spiegel, flirtologist and master of social energy, enthusiasm and vibrancy speaking on finding our own method of interaction and personal success.

The November meeting held at Little Jack's Steak House in Northeast Minneapolis featured Christopher Graham, chief underwriter for Hartford Life. Mr Graham presented an enlightened overview of personal preparation, development, and success within the insurance industry, as well as company sponsorship of ideal goals and achievement to ensure mutual success for employees, their respective companies, and our financial services industry in the midst of change.

### **Mary Smythe, Vice President**

As Vice President in 2002, I assisted the President as needed and helped finalize details for our Society meetings. In October, I attended the annual LOMA Conference in Toronto, Canada, and represented our Society in the Officer's Training sessions with FLMI Society Board members from across the country (and world!).

### **Terry Teske, Treasurer**

As 2002 Treasurer, I managed all Society finances, including responsibility for the budget and bank account. A report summarizing financial activity during 2002 is included at the end of this newsletter. I also managed the billing and collection of Society dues and ensured the prompt payment of Society bills. I collected quarterly registrations and monies, maintained our membership roster and created name tags. I also helped prepare our newsletter, and was one of the people participating in the Saints group ticket lottery. I especially enjoyed writing Thank Yous to our wonderful speakers throughout the year.

### **Lori Webb, Secretary**

During 2002 I kept minutes at Society meetings and distributed those minutes to all of our Society Board members. I also am responsible each year for purchasing the beautiful roses that are given to our new FLMI's.

## Activity Reports from 2002 Society Officers and Board Members (continued)

### LuAnn Maxfield, Society Committee Representative

In 2002, I continued to be the communications link with the LOMA Headquarters in Atlanta, GA. On the local front, I served as the link for the Society members to the Board members by providing input from surveys that I designed. The Society members' responses on the surveys are valuable information to the continued success of the Twin Cities FLMI Society.

### Carole Hanson-Grue

I was responsible for setting up all of our meetings, making reservations, determining food items, and providing establishments with a final member count of attendees.

## Spring Seminar – Tuesday, May 6



Mark your calendars. Our annual Spring Seminar will be held on Tuesday, May 6<sup>th</sup>. It will be held in the morning, and will be a ½ day event. We will start with a buffet breakfast at 8 am. Some great speakers are being lined up for our morning session. Watch for more details in our April issue.

### Meet A Member



**Mary Smythe, 2003 Society President**

I received my FLMI designation in 1994. I went to the FLMI Society of the Twin Cities Fall Recognition Dinner that year, since I was recognized for attaining my designation, but did not go to any other FLMI meetings until about 1997 or so. At that time, I wanted to get more involved in the Insurance Industry, and so I volunteered to help on a committee in our local FLMI Society. I worked on the Job Posting Warehouse committee for a few years and eventually became the chairperson for the project. I enjoyed working with the board members and helping out with all the planning for the meetings and events, so I decided to become more involved. I was elected Secretary in 2001, and then served as Vice President in 2002. I am now the President, and I really enjoy working with the other board members to develop informative events for our members.

I am a Sr. Underwriting Consultant for Hartford Life, and have worked for Hartford for over 8 years. When I am not working, I enjoy downhill skiing, reading, cooking, music and spending time with my husband and 2 young kids.

### Board Opportunities

Have you ever wondered about what the FLMI Society board does? Do you desire a great way to connect with others? One way you can do so is by being a participant. We have current openings for volunteers to assist with Marketing and Publicity. Ask a friend or associate to join you. It's a great way to get involved and be where it's happening. We'd be glad to tell you more about the opportunities and explain any time commitments. Feel free to contact any board member to inquire and find out more.

## **Job Posting Warehouse**

Here are company web sites, job lines, and some specific current job openings:

### **Allianz Life Insurance Company of North America**

See Careers on the website at: [www.allianzlife.com](http://www.allianzlife.com)

### **American Express**

See the website at: [www.americanexpress.com/careers](http://www.americanexpress.com/careers)

### **Catholic Aid Association**

See Careers at Catholic Aid on the website at:

[www.catholicaid.com](http://www.catholicaid.com)

### **Clark/Bardes Consulting --The Healthcare Group**

See Careers on the website at: [www.clarkbardes.com/hg](http://www.clarkbardes.com/hg)

### **EFL Associates, Inc. (search agency)**

Current position:

Vice President-Operations

Small, growing life insurance company in Kansas seeks operations professional to manage underwriting, new business, claims and policy owner services. Staff of 12-15 people. Reports to the CEO. Qualified individuals will possess 7+ years of life insurance experience, and be capable of taking a life product from start to finish. Please forward resume to: Linda Smith, Staff Consultant, EFL Associates, Inc., [smith@eflkc.com](mailto:smith@eflkc.com)/ or call: 913-451-8866.

### **Fortis Health**

See Career Opportunities on the website at:

[www.fortishealth.com](http://www.fortishealth.com)

Current opening:

- Individual Medical Underwriter (at Plymouth location):

#### **Description**

The Individual Medical Underwriter is responsible for assessing the risk presented to the company by Health Insurance applicants, determining whether, and under what conditions, to assume a risk. To determine eligibility, the Underwriter must assess the medical risk by reviewing medical questions, conducting telephone interviews with applicants, and interpreting medical records, lab values and paramedical exams. An important aspect of this role is the communication with our agents and marketing representatives. Hours of 9:30 – 6:00 or later preferred.

#### **Qualifications**

Candidates must have nursing degree, medical background or medical underwriting experience (preferably 2 years of individual and small group). Candidates should also possess strong analytical and problem solving skills, excellent judgement and decision-making skills, strong prioritization skills and organizational abilities. PC skills, and keying ability of 30wpm or higher with a low ratio of error and excellent phone skills including phone technique and diplomacy are required. Medical knowledge including medical terminology and structures and functions is needed. The ability to work independently and within a regional environment while balancing individual, regional, and departmental goals is essential. Excellent communication and customer service skills are also required. Bilingual (Spanish) skills are also a plus.

Apply at our website. Search for this job by title, or by job number 825.

### **Hartford Life**

See Career Opportunities on the website at:

[www.thehartford.com](http://www.thehartford.com)

Current openings:

- As a global leader in insurance, asset management and financial service products, Hartford Life offers professionals every possibility for growth. Whether we're helping customers or building careers, we're experts at creating the kinds of advantages that help people reach their goals.

## **Job Posting Warehouse (continued)**

Hartford Life has a variety of opportunities available within the Individual Life and Mutual Funds business lines in both Woodbury and Plymouth. Opportunities are available in Training and Development, Customer Service, Administration, Information Technology, Project Management, Human Resources and Claims. Woodbury Financial Services has opportunities in National Sales, Customer Service and Paralegal.

Let us find a job for you! Register with The Hartford's job matching system at [www.thehartford.com/career](http://www.thehartford.com/career) and let us do the work. With the Hartford's job finder, you can:

- Create a confidential personal profile
- Immediately receive a listing of all current job openings that match your profile
- Continuously receive emails about new job openings that match your profile

### **HealthPartners**

See Career Opportunities under "About HealthPartners  
on the website at: [www.healthpartners.com](http://www.healthpartners.com)

### **ING/Reliastar**

See the website at: [www.ing-usa.com/careers](http://www.ing-usa.com/careers)

### **Minnesota Life**

See Careers on the website at: [www.minnesotamutual.com](http://www.minnesotamutual.com)  
Or, call the Job hotline: 651-665-7934

### **MSI Insurance Companies**

See Career Opportunities at: [www.msi-insurance.com](http://www.msi-insurance.com)

### **Prudential**

See Careers on the website at: [jobs.prudential.com](http://jobs.prudential.com)

### **Thrivent Financial for Lutherans**

See the Career Center at: [www.thrivent.com](http://www.thrivent.com)

For more information about these jobs, including the contact persons, call or write the Job Posting Warehouse committee chair, Bob Coleman (Allianz 763-765-2818, [Bob.Coleman@Allianzlife.com](mailto:Bob.Coleman@Allianzlife.com)). If your company has personnel needs, please encourage your Human Resource Manager to contact us about publishing openings in our newsletter. It Works! We also encourage any comments or ideas about how we can improve this service.

## **2003 Officers and Board of Directors**

<i>President</i>	<i>Mary Smythe</i>
<i>Vice President</i>	<i>Terry Teske</i>
<i>Treasurer</i>	<i>Lori Webb</i>
<i>Secretary</i>	<i>Bob Coleman</i>
<i>Program Co-Chair</i>	<i>Carole Hanson-Grue</i>
<i>Society Representative</i>	<i>LuAnn Maxfield</i>
<i>Member at Large</i>	<i>Paul Lindemann</i>
<i>Volunteer Representative</i>	<i>Debra Harrison-Miller</i>
<i>Education Representative</i>	<i>Jennifer Victor-Larsen</i>
<i>Past President</i>	<i>Mike Orr</i>

**Twin Cities FLMI Society**  
**2002 Financial Activity Summary**  
**January 1, 2002 through December 31, 2002**

	<b>Actual 2002</b>
<b>Revenues:</b>	
Beginning Cash Balance	5,289.27
Dues	7,064.00
Meetings	4,656.95
<b>Total Revenues</b>	<b>17,010.22</b>
<b>Expenses:</b>	
Annual Conference	2,031.94
Board Appreciation Dinner	315.61
Checking Account Fees	10.00
Meetings	2,995.89
Member Gifts	315.21
Scholarship	0.00
Service Award to Past President	103.18
Speakers	2,700.00
Supplies	19.87
Website	682.00
<b>Total Expenses</b>	<b>9,173.70</b>
<b>Ending Balance (Revenues - Expenses)</b>	<b>7,836.52</b>