



FELLOW TALK

May, 2007

Inside This Issue

- 1 President's Message
- 2 Scholarship Information
- 3-4 Spring Seminar
- 5 Winter Meeting Recap
- 6 Winter Meeting Photos
- 6 Board of Directors



“Come for a great breakfast and stay for a great program.”

A MESSAGE FROM OUR PRESIDENT



Paul Lindemann, FLMI, ACS
Catholic Aid Association

Well, when I mentioned in my last president's message that I hoped people would endure winter, I didn't think that endurance would have to stretch into spring. Where else but Minnesota can it be 81 degrees on March 26 and 18 degrees a week later.

I'm in Atlanta today (April 16) for LOMA's Life Conference. I signed up for this conference in hopes of finding warmer weather. So, naturally, yesterday it was 65 in Minneapolis, and in Atlanta it was raining with a wind chill of about 25. Go figure.

Rain or shine, sun or snow, our Spring Seminar will go on as planned on Tuesday, May 15. (The full program is listed in this issue of *Fellow Talk*.) I'm especially excited about this Spring Seminar for several reasons.

Spring Seminar 2007 will be the first major event in the Catholic Aid Association's newly-renovated auditorium. We've been without that space for over seven months due to a fire in our building last fall, and it'll be great to have it back. In addition, David Parr, LOMA's manager of training and development, will join us that day to talk about *LOMA Learn*, LOMA's new e-learning program. He will also help us recognize our Education Representatives and Company Representatives for all the hard work they do for LOMA and our Society. (Our Ed Reps and Company Reps will receive a special invitation to this meeting.)

Come for a great breakfast and stay for a great program. I hope to see you all on May 15!

SCHOLARSHIP



Mark your calendars:

Spring Seminar

Tuesday, May 15

*Catholic Aid
Association*

Recognition Meeting

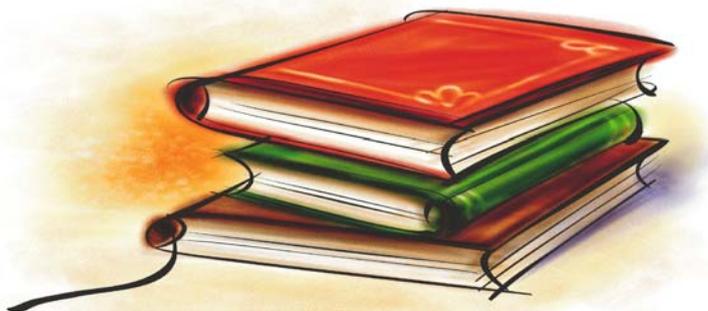
Tuesday, October 9

Jax

*LOMA Annual
Conference*

September 16-18

Quebec City, Quebec



Submission Deadline is June 30, 2007

The LOMA Society of the Twin Cities Scholarship Program will again be awarding a \$500.00 scholarship for the 2007 – 2008 academic year. Students may be an accepted first year or continuing student.

LOMA Society of the Twin Cities in good standing, their children, grandchildren, or spouse are all eligible candidates. New FLMI designees eligible for membership in the LOMA Society of the Twin Cities are also eligible if they receive their designation prior to the application deadline of June 30, 2007.

A statement of personal goals or development plan must be submitted for post-secondary students. Members or associate members must submit a statement of how their LOMA educational achievements or society membership has helped them. Details are included in the Scholarship Program Guidelines.

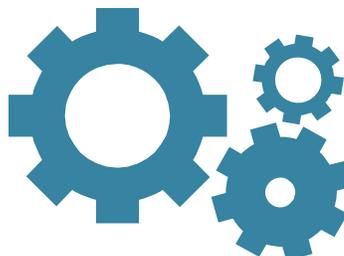
Scholarship applications and guidelines are available from any LOMA Society of the Twin Cities board member and will also be available at the Spring Seminar.

Visit us at

www.LOMA-TC.com

Visit LOMA at

www.LOMA.org



SPRING SEMINAR

Agenda

Location: Catholic Aid Association
3499 North Lexington Avenue
St. Paul, MN 55126
Phone: (651) 490-0170

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

Agenda: 7:30-8:15 Breakfast Buffet
8:15-9:15 David Parr
9:15-9:25 Break
9:25-9:40 Sue Veazie
9:40-10:40 Roundtable
10:40-10:55 Break
10:55-11:00 Business Meeting
11:00-12:00 Lisa Wendt

Buffet: Scrambled Eggs
Bacon and Sausage
Assorted Pastries
Hashbrowns
Fresh Fruit
Coffee, tea, orange juice, milk

Charity: Ready For Success

Please register with your company representative by Friday, May 4.

[LOMA Society Meeting Contact](#)

Genevieve Stadtler, FLMI, AALU, ACS
Lead Life Underwriting Specialist
Prudential Financial
13001 County Road 10
Plymouth, MN 55442
Phone: (763) 519-2435
Email: Genevieve.stadtler@prudential.com

Speakers

**David Parr, LOMA,
Director of Business Development**

“LOMA’s e-Learning Solutions”

David’s responsibilities include creating and maintaining strong relationships with LOMA member companies and identifying solutions that will enable them to improve their competitiveness in today’s marketplace.

David has 20 years of insurance and financial services experience that spans Underwriting and Claims. Prior to joining LOMA, he was Director of Claims and Business Continuity Site Coordinator for ING. In that role, he was responsible for a large claims operation that handled life, health and disability claims. David was also responsible for ensuring adequate disaster recovery preparedness for the Atlanta site. Before that role, he led a regional underwriting team responsible for ING’s flagship company in the US.

David graduated with honors from Georgia State University in 1988 with a Bachelor of Arts degree. He received a Master of Business Administration degree, with a concentration in Human Resources, from Kennesaw State University in 1995. He also earned several insurance and financial service designations, including FLMI and ALHC.

David also served on the Georgia Claims Association Board from 2000 – 2005, serving as President during his final year on the Board.

SPRING SEMINAR (continued)

Compliance Roundtable

The LOMA Society of the Twin Cities will be featuring a Compliance Roundtable at its Spring Seminar on May 15th. The Roundtable will focus on what compliance is and how it impacts the many different areas of a life insurance company.

The group will also touch on current compliance issues affecting the life insurance industry. The panelists bring many years of industry experience to the discussion, and include:

- Ann M. Buffie, President, Ann Buffie & Associates, Inc.
- Susan Klasen Albrecht, JD, CLU, Vice President and General Counsel, Catholic Aid
- Mark Rassier, Compliance Officer, RiverSource Distributors, Inc.
- Dixie Carroll, JD, FLMI, AIRC, Compliance Director, RiverSource Distributors, Inc.

Lisa Wendt **Professional Development Coach**

“Organizing Therapy: Analyzing the Overstuffed Home & Home Office”

Lisa Wendt originally founded Sort-It-Out in 1999. In 2005, Sort-It-Out was renamed to Homes That Work, a name better fitting her vision of creating organized homes that are beautiful in function as well as form – “homes that work”.

Homes That Work strives to create organized homes that begin at the front door, from the piles of shoes you step over in the entry way to the boxes in the basement you haven’t opened in 10 years. Lisa helps the client see how their household really functions, how they actually live, and redefines the space to prevent future clutter problems.

Lisa also works with clients in the design stage of construction, making recommendations for unique, effective storage solutions, so clients can get the home they want the first time.

Lisa is an active member in the National Association of Professional Organizers (NAPO), the Minnesota Chapter of NAPO, and is the chapter’s Past President. She is also a member of the elite Golden Circle of NAPO.

Ready For Success

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. With help from IBM and Wells Fargo Foundation, Ready For Success now offers clients additional assistance in preparing for the job interview in its’ new initiative, “Interviewing 101”. Ready For Success’s Program Manager, Sue Veazie, and Volunteer Coordinator, Sarah Greving, will step you through the client assistance process and how you can be a part of their success.

2007 Winter Meeting Recap

The LOMA Society of the Twin Cities of Minneapolis and St. Paul held its Winter Meeting on March 6 at the Four Points Sheraton in Minneapolis. Following dinner, Society President Paul Lindemann welcomed the attendees and conducted a brief business meeting. He recognized the achievements of departing board members and past presidents Terry Teske and Lori Webb and thanked them for their many years of dedicated service to the organization. He also acknowledged the efforts of immediate past President Rolf Anderson.

The evening's keynote speaker was Laurie Kimball, who delivered an engaging presentation entitled, "Stress: What, Who, Why and How or the Ups and Downs of Stress." Her talk focused on recognizing and managing stress.

Ms. Kimball, a psychiatric nurse and counselor, defined stress as a physically, mentally, or emotionally disruptive condition that is often synonymous with change. But she noted that even positive changes can be stressful and that stress is not necessarily negative. Stress can help to motivate, increase energy levels, and focus our attention. She quoted Hans Selye who commented that, "Without stress, there would be no life."

But if stress is unmanaged or resolved the affects can be dramatic. It is estimated that up to 75% of all doctors visits are stress related. Stress in the workplace is estimated to cost \$300 billion annually in decreased productivity, absenteeism, and turnover. Stress factors at work include job demands, a lack of job security, relationships with co-workers, and a feeling of no control.

Managing stress can begin with good habits for eating, sleeping, and exercising. Moreover, it's important to recognize stress and develop strategies for releasing stress and refocusing our energies. Ms. Kimball noted that we can't always control what causes stress, but we can work to control how we react to stress. Changing how we think will change what we feel.

It's helpful to ask ourselves what causes us to become stressed and what are the signs and symptoms to watch for. We can then select strategies for managing stress, which may include simple breathing exercises, making time to relax and take a break, making sure not to over commit, setting goals, meditation, or spending time with people we like. However, it's also very important to recognize when we're not able to deal with stress on our own and to seek professional help.

Ms. Kimball is a remarkably engaging speaker who discussed a very serious topic but also interjected considerable humor into her presentation. The enthusiastic audience gained a better understanding of stress and ways to manage its negative affects.

As part of its on-going charitable activities, the Society also accepted donations totaling \$181.00 for the Cancer Kids Fund of the Children's Hospitals and Clinics of Minnesota. The fund provides support, care, and comfort to children and families coping with cancer or blood disorders.

Winter Meeting Photos



L to R: Society President Paul Lindemann, LOMA Society Committee Representative Dixie Carroll, keynote speaker Laurie Kimball, Treasurer Rolf Anderson, Program Chairperson Genevieve Stadtler, and Vice President LuAnn Maxfield.



Keynote speaker Laurie Kimball discusses stress management at the LOMA Society of the Twin Cities Winter Meeting.



Remember & Honor

Memorial Day
Monday, May 28

Board of Directors

**Paul A. Lindemann, President
Past President (1999)
FLMI, ACS**
Catholic Aid Association
(651) 490-0170, ext. 174
plindemann@catholicaid.com

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

**Lori FitzPatrick, Secretary/Education
Chair
FLMI, ACS**
(763) 792-3088
lorifitzp@hotmail.com

**Rolf T. Anderson, Treasurer/Nominating
Committee Chairperson
Past President (2006)
FLMI, FFSI, ACS, AIRC**
New York Life Insurance Company
(952) 885-1229
Rolf_T_Anderson@newyorklife.com

**Dixie Carroll, LOMA Society Committee
Representative/Membership Chairperson
FLMI, AIRC, ACS**
Ameriprise Financial Services, Inc.
(612) 678-4177
dixie.carroll@ampf.com

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

**Jennifer Victor-Larsen, Member At Large
FLMI, ACS, FALU**
Prudential Financial
(763) 509-4061
Jennifer.VictorLarsen@Prudential.com