



# Fall 2013 Newsletter

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## Contact Us

<http://www.loma-tc.org>

[LOMATwinCities@gmail.com](mailto:LOMATwinCities@gmail.com)

## Dinner Meeting - LOMA Society of Twin Cities

- Speaker:** "Succeeding in a Challenging Environment" with Jon Stenberg, Executive Vice President and General Manager, RiverSource Insurance
- Date:** Tuesday, October 8, 2013
- Location:** Securian Financial Group  
400 Robert S N  
St Paul MN 55101  
Parking in 401 Bldg for \$2 (\$1 bills or quarters preferred)
- Cost:** Members - \$25  
Non-members - \$35
- Charity:** Ready for Success
- Program:**
- 5:30 Registration & Social Hour
  - 6:00 Networking activity
  - 6:45 Business Meeting
  - 7:00 Keynote Speaker  
Jon Stenberg, Exec. Vice President & General Manager  
RiverSource Insurance
  - 7:45 Recognition Ceremony  
New Designees: Ask your manager to join you!
- Buffet:** Pasta Bar with chicken, Italian sausage & sauce  
Caesar salad & bread sticks  
Chef's vegetables  
Assorted desserts

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## “Succeeding in a Challenging Environment” – Jon Stenberg, RiverSource Insurance



Jon is responsible for leading strategy, product development, sales and marketing, service, and operations for the full line of RiverSource® insurance products.

Jon joined Ameriprise Financial in January 2011 with more than 20 years of experience in the insurance and financial services industry. Prior to joining Ameriprise, he was with New York Life, where he was senior vice president and head of Retail Insurance, responsible for product development within the company’s core life business. Jon also held key leadership and sales positions at UBS, Lincoln Financial and Aetna. He is a U.S. Army veteran.

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## 2013 Scholarship Winner

The 2013 Scholarship Committee is pleased to announce that this year’s recipient of the LOMA Society’s \$500 scholarship is Ahna Hoffman. Ahna is majoring in Economics at Century College. She is the daughter of Renee Hoffman, FLMI, ACS, AIAA, AIRC at Catholic United Financial. The scholarship will be presented at the Fall Recognition Dinner.

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## Save When You Attend a 2014 Meeting or Seminar

Society members pay half price to attend a meeting or seminar in 2014 when they bring a new member guest who has paid full meeting or seminar price. What a better perk when you share the experience of a LOMA meeting or seminar!

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## Outstanding Society Awards

The Board is thrilled to announce that the LOMA Society of the Twin Cities has won the following Outstanding Society Awards this year:

- Communication and Public Relations
- Community Service

- Membership
- Special Achievement

The national LOMA organization extends its congratulations to all of the Twin Cities Society members!

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## New LOMA Designees

Congratulations to the new LOMA designees!

### **AAPA**

Angie Kivi, Securian

Sara Fulmek, Securian

Gauri Multani, TATA Consultancy Services

Trisha Schilling, Catholic United Financial

Genevieve Parriott, Allianz Life Insurance

Cjrostoam Ajgrem-Williams, Allianz Life Insurance

### **ACS**

Ken Deason, Federated Life Insurance

Gleen Moen, Federated Life Insurance

Bonnie Coughlin, Federated Life Insurance

Eric Proehl, Federated Life Insurance

Shelly Prieve, Federated Life Insurance

Lisa Aus, Federated Life Insurance

Lynnae Byers, Federated Life Insurance

Kelly Maalis, Federated Life Insurance

Margaret Hanson, Federated Life Insurance

Corrine Mahlman, Federated Life Insurance

Stacy Nelson, Federated Life Insurance

Jeffrey Trager, Federated Life Insurance

Pamela Saia, Prudential Financial

Peggy Polden, Prudential Financial

Blair Kohlbry, Prudential Financial

Jennifer Nollan, RGA Reinsurance

Bradley Wolff, ING ReliaStar Life Insurance

Benjamin Hesse, Assurant Health

Sarah Wiysel, Allianz Life Insurance

Karen Ullen, Allianz Life Insurance

Owen Carlander, Allianz Life Insurance

Brandon Reinke, Securian

Sharon Larson, Securian

Anna Brandel, Securian

Kelly Minten, Catholic United Financial

### **AFSI**

Michael Horan, State Farm  
Mark Madson, State Farm

**AIAA**

Glenn, Moen, Federated Life Insurance  
Michaela Voor Vart, Legal & General  
Renee Hoffman, Catholic United Financial

**AIAF**

Michele Dungworth, Allianz Life Insurance  
Amy Wienke, Independent  
Lisa Balagot

**AIRC**

Renee Hoffman, Catholic United Financial  
Emily Pernu, ING ReliaStar Life Insurance  
Kim Odens, Securian  
Erica Coan, Federated Life Insurance

**ALMI**

Kelly Brown, ING ReliaStar Life Insurance  
Duane Pfaff, ING ReliaStar Life Insurance  
Nagananda Muthukuru, TATA Consultancy Services  
Srihari Attuluri, TATA Consultancy Services  
Rohan Pandit, TATA Consultancy Services  
Dinesh Kundanam, TATA Consultancy Services  
Patrick Piepkorn, Securian  
Sarah Cable, Securian  
Katy Gilley, Securian  
James Dougherty, Securian  
Katherine Kim, Securian  
Sheri Banitt, Securian  
Robert Large, Securian  
Rebecca Stenlund, Securian  
Neil Ballis, Securian  
Kelsey Swanson, Securian  
Kelly Rollinger, Securian  
Dhanik Dharmapa, CGI Information Systems & Management Consultants  
Eric Canter, RGA Reinsurance  
Ann Phelps, Thrivent Financial for Lutherans  
Vicki Doberstein, Thrivent Financial for Lutherans  
Sara Wacek, Thrivent Financial for Lutherans  
Jim Calubavan, Country Financial  
Kathleen Mary Maikozak, Guardian Life Insurance  
Nicole Muller, Allianz Life Insurance  
David Moore, Allianz Life Insurance  
Chor Vang, Allianz Life Insurance  
Eric Proehl, Federated Life Insurance

Jaclyn Natzel, Federated Life Insurance  
Erica Coan, Federated Life Insurance  
Blaire Kohlbry, Prudential Financial  
Cindy Novotny, Prudential Financial  
Sara Enright, Prudential Financial  
Wesley Bradshaw, State Farm  
Aimee Rassier, State Farm  
Jessica Johnshoy, Direct Response Insurance Administrative Services

**ARA**

Glenn Moen, Federated Life Insurance  
Renee Hoffman, Catholic United Financial

**FFSI**

Christina Bellamy, Securian  
Kristen Gemmill, Securian  
Paula Yager, Securian  
Michael Horan, State Farm  
Veneta Bebrevska-Nedelcheva, Allianz Life Insurance

**FLMI**

Pamela Anson, ING ReliaStar Life Insurance  
Bradley Wolff, ING ReliaStar Life Insurance  
Hugh Dunaway, ING ReliaStar Life Insurance  
Jenny Fischer, ING ReliaStar Life Insurance  
Srinivas Denduluri, TATA Consultancy Services  
Venkata Siva Srinivas Rachapudi, TATA Consultancy Services  
Jodie Salisbury, Federated Life Insurance  
Glenn Moen, Federated Life Insurance  
Nichole Crawford, Federated Life Insurance  
Brian Haggerty, Federated Life Insurance  
Patrick Piepkorn, Securian  
Laura Oien, Securian  
Jeffrey McGinley, Securian  
William Gould, Securian  
Jared Asay, Securian  
Kelly Rollinger, Securian  
Hank Stewart, Allianz Life Insurance  
Michele Doughty, Allianz Life Insurance  
Christopher Manea, Ameriprise Financial  
Amy Olin, State Farm  
Wesley Bradshaw, State Farm  
Marc Davis, State Farm  
Cindy Novotny, Prudential Financial

**PCS**

Michaela Voor Vart, Legal & General America  
Beth Eberback, Mutual of America Life Insurance

Tyler Buchardt, Federated Life Insurance  
Heather Brown, Federated Life Insurance  
Anthony Lindsay, Federated Life Insurance  
Jeffrey Trager, Federated Life Insurance  
Angela Olson, Securian

**UND**

Krista Tossey, Securian  
Catherine Cook, First Colony Life Insurance  
Rheanon Harlan, Thrivent Financial for Lutherans

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## LOMA Society of the Twin Cities Officers and Board Nominees

The Nominating Committee of the LOMA Society of the Twin Cities recommends the following slate of officers, board members and society committee representative for 2014 be placed in nomination for election at our next membership meeting on October 8, 2013.

Co-Presidents:	Dixie Carroll and Barb Prinz (both from Ameriprise Financial)
Vice President:	Robin Hollicky (Prudential)
Secretary:	Tyler Akerlind (Securian Trust Company)
Treasurer and Past President:	Julie Printz (Thrivent Financial)
Society Committee Representative:	Michaela VoorVart (Legal & General America)
Membership Committee Chair:	LuAnn Maxfield (Prudential)
Communications Chair:	Barb Prinz (Ameriprise Financial)
Program Committee Chair:	Dawn Miller (Prudential)
Member at Large:	Carol Ullery (Blue Cross and Blue Shield of Minnesota)

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## Society Dues

Twin Cities Society dues of \$10 are payable for the period from September 2013 through August 2014. If your company has not submitted payment, please submit to:

Claudia Wiebold, Twin Cities LOMA Society Treasurer  
Securian Financial Group  
400 Robert St N  
St Paul MN 55101

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## LOMA Society of the Twin Cities Holds Spring Seminar

The LOMA Society of the Twin Cities of Minneapolis and St. Paul held its Spring Seminar on May 7, 2013 at Catholic United Financial. The seminar began with a breakfast buffet and a brief business meeting followed by three presentations.

The first presentation was titled, “Toastmasters Impact on Careers – 3 Perspectives.” Three speakers, Greg Barth, Kyle Elbert, and Teri Erhardt, shared their experiences with Toastmasters. They commented that Toastmasters is best known for helping its members develop public speaking skills, an important ability since it may not matter how much someone knows about a topic if they can’t communicate effectively.

The speakers went on to describe how Toastmasters can impart many other skills including listening skills, presentation skills, including the technical the aspects of a presentation, meeting skills, and leadership skills. Toastmasters also teaches how to keep an audience engaged. They concluded by describing how Toastmasters has helped them in both their professional and personal lives.

The second speaker was Tom Larson from Thrivent Financial for Lutherans who spoke on, “How Financial Planners Can Help Kids and Parents Prepare to Fund College and Avoid Costly Mistakes.” He stated there is often very little planning for college funding, although paying for a college education is among the most significant investments that is made, along with purchasing a house and retirement funding.

Tom spoke about how to build a “strong college strategy” that should focus on three things: admissions, academics, and financial aid. He pointed out that a school that appears to be more costly may actually cost less because increased financial aid may be available. He said a financial planner can help develop a plan for funding a college education. The plan will also help

families protect other financial goals. Tom also noted that it is very important to understand the impact of student loans. A rule of thumb is not to borrow more than the expected first year annual salary.

The third speaker was Kristin Ferguson, Quantitative Risk Manager at the Securian Financial Group. Her talk was titled, "Topics in Life Insurance: Risk Management." She spoke about the various risks a life insurance company faces including mortality, equity, interest rate, credit, policyholder behavior, and operational risk.

Kristin discussed how the market crash of 2008 brought the important of risk management into sharper focus. She noted it is important to work risk management into product development rather than after the fact and that funds must be managed for volatility. Kristin concluded by stressing the importance of managing risk appropriately and how a company must continually reevaluate the risk management tools it has in place.

Finally, at each meeting the LOMA Society selects a charity to which members may contribute. The Spring Seminar featured the Catholic United Foundation. Bob Heuermann, the foundation's executive director, described, "Catholic United Response," a program the foundation developed to provide disaster relief in the region. He spoke about several recent disasters and how response teams were quickly mobilized to provide assistance. Society members contributed generously to the Catholic United Foundation in support of their efforts.

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## LOMA Twin Cities Board Members

### **Julie Printz, President**

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Thrivent Financial for Lutherans  
(612) 844-8372  
julie.printz@thrivent.com

### **Dixie Carroll, Past President**

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Ameriprise Financial Inc.  
(612) 678-4177  
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### **Rolf T Anderson, Vice President and Scholarship Chair**

FLMI, FFSI, ACS, AIRC  
212 West 36th St.  
Minneapolis, MN 55408  
612-824-7807



roanders6@aol.com

**Claudia Wiebold, Secretary & Program Committee Chair**

FLMI/M, ACS  
Securian Financial Group  
(651) 665-3032  
claudia.wiebold@securian.com

**Leah Reckin-Mahoney, Treasurer**

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**Barb Prinz, Communication Chair**

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

**LuAnn Maxfield, Membership Committee Chair**

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

**Michaela Voor Vart, Society Committee Representative**

MBA, FALU, FLMI, ACS, ARA  
Legal & General (Banner Life)  
(651) 407-3158  
mvoorvart@lgamerica.com

**Robin Holicky, Member at Large**

Hartford Life  
robin.holiky@hartfordlife.com