



FELLOW TALK

February, 2007

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"I'm excited about our LOMA Society—and you should be, too!"

As Bob Dylan penned over four decades ago, "The times, they are a-changin'."

A Message from Our President



Paul Lindemann, FLMI, ACS
Catholic Aid Association

Welcome to 2007, everyone! To paraphrase a line from a presentation Chuck Anderson of Prudential Financial gave to us last year, "I'm excited about our LOMA Society—and you should be, too!"

As Bob Dylan penned over four decades ago, "The times, they are a-changin'." The last time I wrote one of these columns in 1999, e-mail was a relatively new means of correspondence. Most of us "surfed" the Internet at a snail's pace through dial-up modems. And if you were lucky enough to have a Pentium PC, either at home or at work, you felt like you had the world by the tail. (At least *I* did!)

But, as the French say, "Plus ça change, plus c'est la même chose," or "The more things change, the more they stay the same." No, I'm not trying to impress you with my foreign language skills. In fact, this phrase, along with, "Je ne parle pas français tres bien" ("I don't speak French very well") is about all the French I remember from college. (I may have to bone up before this year's LOMA Conference in Québec City!)

Rather, I mention "plus ça change..." because it's very appropriate for the times, and our local LOMA Society. For one thing, we're no longer the *FLMI Society of the Twin Cities*, the name we started with over three decades ago. We're the *LOMA Society of the Twin Cities*. LOMA now offers courses and designations that cover a broad range of financial service topics. In 2004 we, like all the other LOMA Societies around the world, changed our name and opened our membership to holders of any LOMA-sponsored designation.

Our LOMA Society Board is also changing.

- **Scott Morley**, our Education Chair since 2005, is leaving the Board. We thank Scott for his service and wish him well.
- We are saying "so long" to two very dedicated women who have served on our Board for over a decade. **Terry Teske** of Minnesota Life and **Lori Webb** of the State of Minnesota (formerly of Thrivent Financial) have served in all the officer positions (President, Vice President, Treasurer, Secretary) during their tenures, and have helped in many other capacities as well. Lori was most recently our Past President. Terry has been our Program Co-Chair and Newsletter Editor for the past several years, and has agreed to help us with our newsletter until we find a replacement. Thank you, ladies, for your many years of outstanding service. You will be missed!

A Message from Our President (continued)

- We are also fortunate to have dedicated new Board members. **Lori FitzPatrick**, formerly of Ameriprise Financial, will be serving as our Secretary and assuming Scott's duties as Education Chair. **Genevieve Stadler** has assumed Terry's position as Program Chair. We also welcome **Dixie Carroll** of Ameriprise Financial, who will serve as our Society Committee Representative and Membership Chair.



Mark your calendars:

*Winter Meeting
Tuesday, March 6
Four Points Sheraton
Minneapolis*

*Spring Seminar
Tuesday, May 15*

*Recognition Meeting
Tuesday, October 9*

*LOMA Annual
Conference
September 16-18
Quebec City, Quebec*

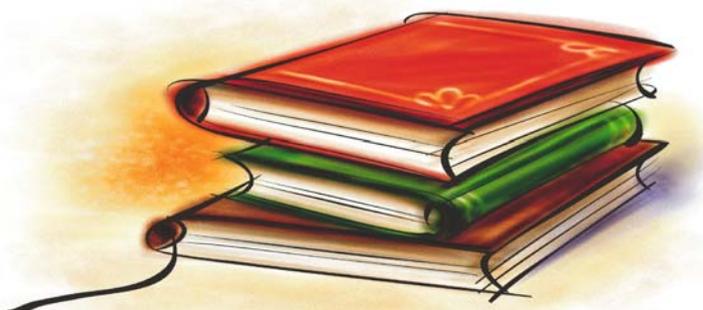
I also want to pay tribute to Rolf Anderson, our Past President. Rolf did a wonderful job of guiding our organization last year, and he did so with professionalism and class. Thanks, Rolf—you left me some mighty big shoes to fill, and I hope I'm up to the task.

One thing that hasn't changed is the dedication of our members. Some of you have been with us for many years; some of you are new to our Society. We congratulate all of you for your achievements, and we're honored to have you as members. Industry education is as important—and as relevant—as ever, and you and your companies are proof of that.

Our lives are busy; we have what seems like unlimited tasks to squeeze into a limited number of hours. We're grateful that you've chosen to spend some of that time with us, and we want to make sure we're meeting your needs. If you ever have any suggestions on how we can better meet those needs, please let me or any Board member know.

I look forward to seeing you at the Four Points Sheraton in Minneapolis on March 6! Until then, enjoy (or, if you're like me, endure) the rest of your winter.

Scholarship



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 Winter Dinner and the Spring Seminar.

Visit us at

www.LOMA-TC.com

Visit LOMA at

www.LOMA.org

Winter Meeting

Guest Speaker



Laurie Kimball

“Stress: What, Who, Why and How or the Ups and Downs of Stress”

The LOMA Society of the Twin Cities is pleased to announce that Laurie Kimball will be this year's keynote speaker at the Winter Meeting. Her talk will focus on recognizing and managing stress.

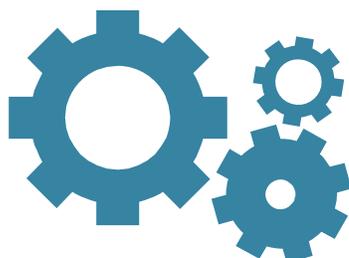
Participants will learn why stress occurs, the symptoms of stress, who's affected by stress, and how stress can be managed. Laurie will discuss ways to reduce stress and demonstrate exercises to “recharge.” Resources for learning more about stress will also be provided.

Laurie Kimball is a psychiatric nurse in the Crisis Intervention Unit at North Memorial Hospital. She has a Master's Degree in Counseling and has experience as an individual therapist. She is also a Toastmaster.

She is the author of "The Depression Toolkit: Practical Ways to Get Through the Day". Energetic and enthusiastic, Laurie presents interesting, informative, and very interactive presentations through a variety of methods to 40-50 groups each year.

A popular LOMA Society speaker, Laurie previously spoke to the Society on maximizing concentration and communication, and managing depression.

Please join us!



Agenda

<u>Location:</u>	Four Points Sheraton 1330 Industrial Boulevard (35 W at Industrial Blvd) Minneapolis, MN 55413 Phone: (612) 331-1900
<u>Cost:</u>	Members - \$30 Non-members - \$35
<u>Agenda:</u>	5:30-6:00.....Registration and Cash Bar 6:00-6:45.....Dinner 6:45-7:00.....Business Meeting 7:00-8:00.....Speaker, Laurie Kimball “Stress: What, Who, Why, and How or the Ups and Downs of Stress” 8:00-8:05.....Door prizes and raffle
<u>Dinner:</u>	Choice of Pecan Crusted Chicken Breast or Herb Roasted Pork Loin Garden Salad Chef's Choice of Seasonal Vegetables Warm Rolls and Butter Vanilla Cheesecake with Strawberries Coffee, Hot Tea, Iced Tea or Milk
<u>Charity:</u>	Children's Cancer Fund

Please register with your company representative by Wednesday, February 28.

LOMA Society Meeting Contact

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LOMA Society Members Walk in TCF Holidazzle Parade, Collect for Emergency Foodshelf Network



The evening of December 7 was rather chilly, with the temperature hovering around 20 degrees. But that didn't stop a dedicated group of LOMA Society volunteers from bringing warmth to the holiday season! Seven members and their families spent the evening as part of the TCF Holidazzle Parade on the Nicollet Mall.

Holidazzle is an annual festival of lights, music and holiday cheer. This year, it ran Wednesday through Sunday evenings from November 24 through December 23. Participating in the downtown Minneapolis parade has become an annual tradition for the LOMA Society of the Twin Cities. This marks the seventh year the Society has taken part in the event.

Wearing train engineer's overalls and lighted caps, our volunteers walked in front of the parade over its eight-block route, spreading cheer and collecting donations for the Emergency Foodshelf Network (EFN). Our group helped collect over \$4,200.00 in cash and about 1500 pounds of food during the parade's third week.

Over the 22 nights of Holidazzle's run, volunteers from many different groups collected \$25,000 in cash and 6,300 pounds of food. With a grant of \$20,000 from Ameriprise Financial, EFN raised a total of \$45,000 in cash. This will fund EFN's efforts to help needy Twin Cities families well into 2007.

Our night at Holidazzle was a great evening of fun and fellowship. We hope you'll be able to join us next year!

2006 Activity Reports

Rolf Anderson – President

- As President, I was involved in organizing and coordinating the activities of the board of directors, conducting board meetings, and working on the Society's planning initiatives.
- I served as the board's liaison with LOMA headquarters and worked to strengthen our relationship.
- I was involved in planning Society events and identifying speakers.
- I also prepared articles for publication in our newsletter and Resource magazine.
- Of our current strategic initiatives, I'm particularly pleased to have begun work on a project that we hope will help strengthen and expand the relationship between the LOMA Society and our members companies.

Paul Lindemann – Secretary / Vice President

- Recorded minutes of LOMA Society board meetings.
- In mid-2006, was asked by the Board to complete the term of the Vice President, who had resigned.
- Filled in for the President as needed in his absence.
- Represented the Twin Cities Society at the LOMA Annual Conference in San Francisco in September (along with Lori FitzPatrick).
- Organized the LOMA Society's participation in the TCF Holidazzle Parade.

LuAnn Maxfield – Society Committee Representative

- In 2006, I served as the connection between the LOMA headquarters in Atlanta, Georgia and the LOMA Society of the Twin Cities.
- On the local level, I was the connection between the local society members and the LOMA Society of the Twin Cities board. In the role, I prepared surveys requesting feedback from our members, recommended action to the Board based on the survey results.

2006 LOMA Annual Conference Conference



Lori FitzPatrick & Paul Lindemann
at the 2006 LOMA Annual
Conference in San Francisco, CA.

Paul Lindemann and I had the honor of representing the LOMA Society of the Twin Cities at LOMA's 2006 Annual Conference and Conferment held in fabulous San Francisco, California from September 17-19. The conference provided a wonderful opportunity to meet LOMA designees from around the world, engage with LOMA staff, and reconnect with friends from past conferences.

We began the conference by attending sessions that were specifically designed for officers of local societies. The sessions provided very useful and practical training on how to successfully manage your organization. There was also ample time and opportunity to exchange ideas with other societies and share "best practices." At the end of the sessions, the Twin Cities LOMA Society was awarded Outstanding Society Awards for excellence in Special Achievement, Community Service, and Membership.

The general conference sessions were fun and inspiring. The most noteworthy sessions were:

- "Open Roads Open Minds" – Steve Uzzell, a professional photographer, speaker, and creative problem solver, shared some of his photographs and insights to dynamic solutions. His delivery and artistry were breath-taking.
- "Your Job Is Bigger Than You Think: Bringing All You Have To Work" – Dr. John Izzo's recipe for creating an energy that makes people want to commit to your vision of your organization. His energizing presentation also encompassed his "four paths to unleash the power of people at work." The energy unleashed during his presentation lasted throughout the conference.

- "Hyperservice" The New Customer Service" – Sue Hershkowitz-Coore, CSP, wrapped up the conference on an up-lifting 'take-away' of "Don't Let Others Take You Down, Down, Down!" Sue had fabulous scenarios, tips and tasks to keep a person enthused.

The culmination of the conference was the Conferment Banquet where the new LOMA designees are the focus of the evening and individually recognized for their achievements. There are some very talented and insightful designees in our organization. It was definitely a celebratory event with fabulous food, lively dancing, and memorable entertainment.

I hope each of you has an opportunity to attend an annual conference. Even if you already have had the honor of attending one, each conference is reinvigorating. I am sure you would find it as inspiring and enjoyable as we did. We returned to Minnesota energized and with new ideas that we hope will strengthen our society, enabling us to increase our effectiveness and expand our services to all our members.

2006 Treasurer's Report

Revenues

Beginning Cash Balance	10,643.05
Membership Dues	1,630.00
Total Revenues	12,273.05

Expenses

Membership Meetings	1,557.45
LOMA Annual Conference	4,197.65
Miscellaneous	144.72
Total Expenses	5,899.82

Ending Cash Balance	6,373.23
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2006 Recognition Meeting

Our Fall Dinner Meeting traditionally honors those members receiving their academic designation offered through LOMA. And this year it was fitting to have a representative from LOMA speak to our new designees and guests.

David, a last minute replacement, enlightened us to the changing atmosphere of education in the workplace. Today, earning a designation no longer means the completion of your education. Like other professions (doctors, lawyers, sales people), continuing your education is common in the insurance and financial industries and has become an expectation. David sighted himself as an example when joining the LOMA staff and enrolling in more career related courses.

David asked all to reflect on their time, efforts and sacrifices (often time away from loved ones) to attain their designations. And in reflecting, to also appreciate what they accomplished and to plan their next step – their next course of study in the financial and insurance field. LOMA offers a variety of subjects, all to enrich their knowledge, increase their value to their employers and themselves.

We thank David for addressing our members and for showing us what life can be after the FLMI.



Sunday, March 11 is Daylight Saving Time.
Set your clocks ahead one hour.

Board of Directors

**Paul A. Lindemann, President
Past President (1999)**

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**Rolf T. Anderson, Treasurer/Nominating
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Past President (2006)**

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