NAIFA ARIZONA

WHO's WHO

2024

Membership Directory 2024

Arizona is a chapter of the National Association of Insurance and Financial Advisors [NAIFA]

NAIFA-Arizona

Association of Insurance and Financial Advisors

FOUNDED 1957

P.O. Box 4728
Scottsdale, AZ 85261

480. 661. 6393
E-mail: naifa-az@azis.com
Website: www.naifa-az.org

PRICE

Member $50.00
Non-member $125.00

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Please let us know in writing if any information in this directory needs to be corrected, or if you would like any information added to, or omitted from, your entry in this directory, and we will try to make appropriate changes in the next edition.

Membership Directory can also be found on NAIFA-Arizona website

Photo by Jerry Jacka ©

NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS

Code of Ethics

PREAMBLE: Helping my clients protect their assets and establish financial security, independence and economic freedom for themselves and those they care about is a noble endeavor and deserves my promise to support high standards of integrity, trust and professionalism throughout my career as an insurance and financial professional. With these principles as a foundation, I freely accept the following obligations:

- To help maintain my clients' confidences and protect their right to privacy.
- To work diligently to satisfy the needs of my clients by acting in their best interest.
- To present, accurately and honestly, all facts essential to my clients' financial decisions.
- To render timely and proper service to my clients and ultimately their beneficiaries.
- To continually enhance professionalism by developing my skills and increasing my knowledge through education.
- To obey the letter and spirit of all laws and regulations which govern my profession.
- To conduct all business dealings in a manner which would reflect favorably on NAIFA and my profession.
- To cooperate with others whose services best promote the interests of my clients.
- To protect the financial interests of my clients, their financial products and my profession, through political advocacy.

Adopted July 2019, Board of Trustees

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PRIDE STARTS HERE

Mission Statement

The mission of this Association is to advocate for a positive legislative and regulatory environment, enhance business and professional skills, and promote the ethical conduct of our members.

NAIFA ARIZONA

Greetings Fellow Members, Sponsors and Friends:

President 2024

It is my honor to assume the role as your 2024 President. And, I would like to take this opportunity to offer Past President, Undrea Smith a huge thank you for the last 3 years of incredible leadership. Undrea, you are amazing!

Now, looking forward, I would like to remind you that 'we need each other', and your continued support is more important than ever. As you know, we are facing several issues that are very concerning to our work on behalf of our clients. To name just two, on the Federal forefront, we have the "independent contractor advisor/employee status" issue along with the updated Reg BI1 issue. IFAPAC contributions are needed, along with your involved membership participation; in addition, we have upcoming State legislative issues. Therefore, we must stand up on behalf of our clients.

So, how can you jump in? In this publication, you will see our directors and their assigned association business duties, which include IFAPAC, Government Relations, Community Service along with Programs. Take it from me, membership is so much fun if you participate.

And that leads me to my next invitation...come to our 2024 IN PERSON meetings, you'll be blown away with content, and blessed with fellowship!

Additionally, I'd like to extend a warm NAIFA AZ welcome to our new members coming from The Society of Financial Service Professionals! NAIFA and the Society merged in 2023.

Finally, and most importantly, thank you for your continued membership support.

Blessings for a wonderful 2024!

Adam Roth
2024 NAIFA-Arizona President

Association of Insurance & Financial Advisors
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naifa-az@azis.com

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San Marcos Insurance Group
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Simplicity
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IFAPAC-Arizona Vice Chair

Connie McAdams
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Spence Cassidy Associates
520.760.0077 • jerlynned@scaaz.com

Social Media

Peter Wood, LACP
American National
480.926.3950 • peter.wood@american-national.com

"There is no exercise better for the heart than reaching down and lifting people up."

- John Andrew Holmes

Leading By Example

David R. Kroll, CLU, ChFC, LUTCF
NAIFA-Arizona Sponsorship Chair

Philip L. Solinsky, LUTCF
NAIFA-Arizona Political Involvement Chair

Robert J. Wernecke, CLU
Life Trustee of the American College

Dwight E. Loeffler
IFAPAC-Arizona Chair

Lars D. Hansen, RICP, LUTCF, LACP
IFAPAC-Arizona Treasurer

NAIFA ARIZONA

NAIFA-ARIZONA Past Presidents

"Knowledge is the treasure, but judgment is the treasurer of the wise."

William Penn

1957-1958, 1958-59	Allyn Watkins
1959-60	Charles A. DeLeeuw
1960-61	Edwin D. McGwire
1961-62	Rulon Rasmussen, CLU
1962-63	Howard O. Kemper
1963-64	Robert E. Pope, Jr., CLU
1964-65	Andrew L. Wolf, CLU
1965-66	Thomas F. Callahan, Jr.
1966-67	Dilworth C. Brinton, CLU
1967-68	J. Lester Shaffer
1968-69	Eugene Taylor
1969-70	Jack E. Bobo, CLU
1970-71	Tony Ziehler, CLU
1971-72	H. Gordon Farrar, CLU
1972-73	Earl T. Nagel, CLU
1973-74	Robert R. Loftus, CLU
1974-75	Timothy Ryan
1975-76	Marshall C. Roberts, CLU
1976-77	Ray Lincoln, CLU
1977-78	Peter Zimmer
1978-79	Robert J. Wernecke, CLU
1979-80	Paul M. Sims, CLU
1980-81	William J. Adler, CLU
1981-82	Robert C. Dougherty, CLU
1982-83	Fred E. Chesebrough, CLU
1983-84	John J. Brooking, CFP
1984-85	Dwight Loeffler
1985-86	Verle F. Naber, CLU, ChFC
1986-87	Michael Eibeck, CLU, ChFC
1987-88	Dennis R. Merideth, CLU, ChFC
1988-89	Gary A. Bomar, LUTCF
1989-90	Marvin D. Loos, CLU
1990-91	James G. Shaw, CLU, ChFC
1991-92	Cliff F. Wilson, CLU, ChFC
1992-93	Jan M. Doughty, CLU, CFP
1993-94	Tod D. Lashway, CFP, LUTCF
1994-95	Robert T. Bishopp, CLU
1995-96	Vinod K. Mohindra, LUTCF, CLU, ChFC
1996-97	Robert J. Westbrook, LUTCF, CLU, ChFC
1997-98	Douglas F. Taylor, LUTCF
1998-99	Barry A. McBride, CLU
1999-00	Myles K. Beck, LUTCF
2000-01	Richard J. Thanig, LUTCF
2001-02	Jim L. Bennett, LUTCF
2002-03	Douglas H. McMurry, LUTCF
2003-04	Eugene R. Bentley
2004-05	Barry A. Cook, CLU, ChFC
2005-06	Henry C. GrosJean
2006-07	Lars D. Hansen, LUTCF
2007-08	William B. Cassidy, CLU, ChFC
2008-09	Philip L. Solinsky, LUTCF
2009-10	Robert A. Bryant Sr., LUTCF
2010-11	David A. Sewell
2011-12	Diana Brettrager, CIC, FSS, LUTCF
2012-13	David R. Kroll, CLU, ChFC, LUTCF
2013-14	Tracy L. Jones
2014-15	Michael A. Sandoval, CLU, ChFC
2015-16	D. Michael Ford
2016-17	Seth Krasne, LUTCF, CLTC
2017-18	Judy Aguilar-Woertz, ChFC, RICP, LUTCF
2018-19	Kenny Ziegler, ChFC
2019-20	Julie Jakubek, MBA
2021-22-23	Undrea Smith, RICP

PROGRAMS COMMITTEE REPORT 2023

January 2023	*Promoted the NAIFA National 'LIVE' -Virtual program*
February 2023	*'Capitol Hill Day' - joint with IFAPAC-Arizona*
March 2023	*"Accelerated Benefit Riders for Life Insurance"-Virtual 1 Hour CE*
April 2023	*"Federal Estate and Gift Taxes & the Secure Act"-Virtual*
May 2023	*In Person Event:*
	"An Introduction to Disability Income Insurance"-1 Hour CE
	"The Wolf That Ate Grandma"-addressing fraud & older adults - 1 Hour CE
June 2023	*"Defending Against Cyber Threats: Strategies to Prevent Cyber Attacks"; "Surviving the Worldwide Cyber Pandemic"- Virtual 1 Hour CE*
July 2023	*Summer Recess*
August 2023	*In Person Event:*
	'New Member Appreciation Social'
September 2023	*In Person Event:*
	"How to Survive an Active Shooter Incident"
	"Retirement Planning-Reverse Mortgages"-In person 1 Hour CE
October 2023	*In Person Event:*
	'How to Dramatically Increase Your Appointments at No Additional Cost"
November 2023	*In Person Event:*
	'Social Security: The Tough Questions"-1 Hour CE
	"How to Realize Your Potential by Getting Out of Your Own Way"
December 2023	*Reserved for Holidays*

GRASSROOTS (Political Involvement) Phil Solinsky, LUTCF, Chair

Arizona 2023 'Capitol Hill Day' held in February. Met with great success. Also, met with both Federal and State Legislators at a number of fundraising events during the year. 2024 'Capitol Hill Day' currently planned for February 6, 2024.

MEMBERSHIP Adam Roth, Chair

2023 Campaign focused on agency leaders. Recognized new members during 'New Member Appreciation Event'. Continue to work on key contacts for agency membership recruitment. Looking forward to 2024 FSP members joining NAIFA.

SPONSORSHIPS David Kroll, CLU, ChFC, LUTCF

2023 saw wonderful support by a number of companies, speakers and agencies in sponsoring both 'In-Person and Virtual' events.

COMMUNITY OUTREACH Bekki Harper, CCFC, Chair

January to March our NAIFA members generously supported "Southern Arizona Book Hero's" with a Book drive for underprivileged kids. Donated books were given with book marks of inspiring and edifying quotes to SABH who in turn fill the trunks of police, sheriffs and other public servants vehicles to have at the ready for children who are removed from their homes for reasons of abuse, neglect or parental misconduct. The gift of an age-appropriate book given at the right time can quickly turn the feel of the situation for these children from hostile to kind. From Villian to Friend. Thank you SABH for all you do and the privilege to support you! **A special thank you to Julie Jakubek, who secured a generous $5,000 donation from her company, Allstate to this project**.

We had an extended summer program that continued thru December providing abused children in recovery with a new lens on life through our support of "Kids in Focus" photography mentoring programs. With our donations of cameras, camera equipment and even tax credit dollars many kids benefited by learning to see the world in new ways.

In addition, our very own Chapter secured an MDRT Foundation Scholarship of $2,500 for "Kids in Focus" through the efforts of MDRT Member Steve Goucher, to be presented to them in January 2024.

Thank you to each member who displays the heart of NAIFA in their generosity to our communities and our partner organizations who support us supporting them. We appreciate you all!

SOCIAL MEDIA Peter Wood, LACP, Chair

Articles, photos and programs regularly posted on Facebook, Twitter, LinkedIn for NAIFA-Arizona as well as NAIFA National.

Government Relations Report found separately.

2023 Government Relations REPORT

Mike Ford

2023 turned out to be remarkably interesting for the Arizona Legislature. It was the longest legislative session in state history at 204 days. The previous record for the longest session was in 1988 at 173 days. Governor Hobbs also broke the previous Veto record in a single session. There were 1675 bills introduced and 348 of those bills were sent to Governor Hobbs for consideration. She signed 205 of the bills into law and vetoed 143 of them. The previous record for most vetoes in a single session was held by former Governor Janet Napolitano. She vetoed 58 bills in 2005. She still holds the record for the most vetoes in total by an Arizona governor at 181 over her six-plus legislative sessions (2003-2009); however, many predict that Hobbs will break that record next session since she vetoed 143 bills in her first session as governor. By comparison, in Governor Ducey's last session as governor 392 bills were sent to him for consideration. He signed 388 of those bills into law and vetoed 4 bills.

Some highlights of NAIFA-Arizona activity follow:

- NAIFA-Arizona Lobbyist Agreement was renewed. Our representative Daniel Romm and his team do an outstanding job of keeping us informed of what is taking place in the Legislature as well as advising us on best practices for achieving the results desired to protect our clients and our businesses. The stats shared in the above paragraph all come from Dan's 2023 Legislative Session Report.
- NAIFA Arizona held a successful Day on the Hill on February 8, 2023. NAIFA members dropped off welcome kits to every legislature and visited with as many of our state representatives as were available to meet. Members shared what NAIFA is about and offered to be available for consultations on any topic or legislation that might be insurance related. This annual event is a major undertaking, and our thanks goes out to Patty Chesebrough for organizing the event and Phil Solinsky for making sure NAIFA is well represented with our state Legislators.
- There were three bills that were of particular concern during the 2023 legislative session about which we shared our concerns with our state legislators. None of these bills were passed into law, which was the desired outcome.
- Your team worked closely with NAIFA National Government Relations by attending webcasts and communicating current issues that may have an impact on your business.

Many thanks go to Phil Solinsky, Dwight Loeffler, Jim Bennett and all of the NAIFA volunteers that help to keep NAIFA's interests top of mind with our legislators.

Note! A copy of the 2023 Legislative Session Summary Report from our Lobbyist Representative, Daniel Romm is available to our members upon request.

NAIFA ARIZONA

NAIFA-Arizona wishes to take this opportunity to thank the speakers/sponsors for so generously giving of their time and talent to its members in the 2023 Programs

JANUARY

NAIFA National 'Live' Program –Webinar

FEBRUARY

NAIFA-Arizona 'Capitol Hill Day'

MARCH - 1 hour CE Credit

"Accelerated Benefit Riders on Life Insurance Policies"

Presenter: Jessica Ciccarelli

Sponsor:

Guardian

APRIL - 1 hour CE Webinar

"Five Things Advisors Need to Know About Estate Planning"

Presenter: Tom Doyle

Sponsor: DOYLE LAW PC Peace of Mind Planning

MAY - 2 hours CE Credit

"An Introduction to Disability Income Insurance"
Presenter: Kirk Quitno

"The Wolf That Ate Grandma – Telemarketing Fraud…And Aging"
Presenter: Barbara Micheletti

Sponsor: **Rob Kanyur**

FAIRWAY

JUNE - 1 Hour CE

"Surviving the Worldwide Cyber Pandemic"
Presenter: Thomas Kirkham

Sponsor: IRONTECH SECURITY

JULY Summer Break

AUGUST - Membership Appreciation Event

SEPTEMBER - 1 hour CE Credit (in person event)

"Retirement Planning – Reverse Mortgages"

Presenter: Juli Doyle

"Surviving a Mass Shooting"

Presenter: Officer Jared Sherman *(not pictured)*

Sponsor: **Juli Doyle/Isis Gauzens** FAIRWAY

OCTOBER - (in person event)

Presenter: Van Mueller

Sponsors: **Allianz - Geroge Bain/Fairway Mortgage**

Spence Cassidy Associates

Allianz FAIRWAY SPENCE CASSIDY & ASSOCIATES

NOVEMBER - 1 hour CE Credit (in person event)

"Social Security – the Touch Questions"

Presenter: Robin Mueller

"The Art of Asking Good Questions"

Presenter: George Grombacher

Sponsor: SIMPLICITY GROUP

DECEMBER - Holiday Break

Advisors Political Involvement Committee

APIC

Nurturing political involvement is the chief responsibility of NAIFA's Advisors Political Involvement Committee. As a member, your support in becoming part of a network of agents and advisors is essential to the success of NAIFA's legislative program.

MISSION STATEMENT

The Mission of APIC

- To actively promote the involvement of agents and advisors in the election of candidates for state and national office, consistent with the legislative interests of the NAIFA federation.
- To identify and foster the creation of significant insurance agent and financial advisor relationships with elected officials.

The Objectives of APIC

- To identify and develop constituent contacts for all members of Congress.
- To involve association members in federal legislative issues per the direction of the NAIFA Government Relations Committee.
- To encourage association members to participate in national, state and local campaign organizations.
- To communicate with and educate NAIFA association members on the importance of political involvement.
- To establish effective communications between constituent contacts and APIC.
- To recognize achievement of political involvement and measure results.

Would you like to become involved? Please let us know.

NAME:______________________________ ASSOCIATION:____________________

PHONE:_______________ EMAIL:______________________ FAX______________

"We in America do not have government by the majority. We have government by the majority who participate."
Thomas Jefferson

IFAPAC | ARIZONA

INSURANCE & FINANCIAL ADVISORS POLITICAL ACTION COMMITTEE

P.O. Box 4728 Scottsdale, AZ 85261 • Telephone: (480) 661-6393

Dwight E. Loeffler
Chair

Connie Jo McAdams, LUTCF
Co-Chair

Lars D. Hansen, LUTCF
Treasurer

Patricia Chesebrough, CAE
Committee Administrator

INSURANCE & FINANCIAL ADVISORS POLITICAL ACTION DEFENDERS

Alspaugh, Jack
Barker, Michael
Barteau, Stephen
Bennett, Jim
Brettrager, Diana
Cook, Barry
Davis, Jerlynne
Deo, Lyle
Dollarhide, Jeffrey
Dzurinko, Andrew
Fay, Dianne
Ford, Mike
Frisby, Maria
Gaboury, Brett
Gonzales, Toni
Goucher, Stephen
Green, Carmen
Hall, Carrie
Hansen, Lars
Hartman, Robert
Hegna, Thomas
Jakubek, Julie
Jones, Tracy
Klein, Michael
Kolesar, Charles
Kolesar, Stephen
Lockard, Dorothy
Loeffler, Dwight
McAdams, Connie
McBride, Barry
Naber, Verl
Nash, Yara
Nitchen, Michael
Patent, Linda
Rios, Marci
Sandoval, Michael
Sewell, David
Wilson, Cliff
Wood, Peter
Ziegler, Kenny

Arizona Legislature - House

Name	District	Party	Email	Room	Phone
Cesar Aguilar	26	D	Email: CAGUILAR	Room 122	(602) 926-3953
Lorena Austin	9	D	Email: LAUSTIN	Room 124	(602) 926-3968
Leo Biasiucci	30	R	Email: LBIASIUCCI	Room 208	(602) 926-3018
-- *Majority Leader*					
Seth Blattman	9	D	Email: SBLATTMAN	Room 125	(602) 926-3996
Selina Bliss	1	R	Email: SBLISS	Room 344	(602) 926-4018
Flavio Bravo	26	D	*Resigned to fill vacancy in Senate for district 26*		
Andrés Cano	20	D	*Resigned on 7/4/23 to pursue graduate studies*		
Michael Carbone	25	R	Email: MCARBONE	Room 341	(602) 926-4038
Neal Carter	15	R	Email: NCARTER	Room 130	(602) 926-5761
Joseph Chaplik	3	R	Email: JCHAPLIK	Room 224	(602) 926-3436
Lupe Contreras	22	D	Email: LCONTRERAS	Room 320	(602) 926-5284
-- *Minority Leader*					
Patricia Contreras	12	D	Email: PCONTRERAS	Room 126	(602) 926-4057
David L Cook	7	R	Email: DCOOK	Room 313	(602) 926-5162
Quantá Crews	26	D	Email: QCREWS	Room 121	(602) 926-3256
Oscar De Los Santos	11	D	Email: ODELOSSANTOS	Room 330	(602) 926-4098
-- *Assistant Minority Leader*					
Lupe Diaz	19	R	Email: LDIAZ	Room 302	(602) 926-4852
Timothy M Dunn	25	R	Email: TDUNN	Room 114	(602) 926-4139
John Gillette	30	R	Email: JGILLETTE	Room 345	(602) 926-4100
Travis Grantham	14	R	Email: TGRANTHAM	Room 204	(602) 926-4868
-- *Speaker Pro Tempore*					
Matt Gress	4	R	Email: MGRESS	Room 112	(602) 926-4105
Gail Griffin	19	R	Email: GGRIFFIN	Room 225	(602) 926-5895
Nancy Gutierrez	18	D	Email: NGUTIERREZ	Room 321	(602) 926-4134
-- *Minority Whip*					
Liz Harris	13	R	*Expelled from the House on 4/12 (HR2003)*		
Justin Heap	10	R	Email: JHEAP	Room 309	(602) 926-4181
Laurin Hendrix	14	R	Email: LHENDRIX	Room 312	(602) 926-4209
Alma Hernandez	20	D	Email: AHERNANDEZ	Room 338	(602) 926-3136
Consuelo Hernandez	21	D	Email: CHERNANDEZ	Room 117	(602) 926-3523
Lydia Hernandez	24	D	Email: LHERNANDEZ	Room 334	(602) 926-3553
Melody Hernandez	8	D	Email: MHERNANDEZ	Room 321	(602) 926-3449
-- *Minority Whip*					
Rachel Jones	17	R	Email: RACHEL.JONES	Room 303	(602) 926-3558
Alexander Kolodin	3	R	Email: AKOLODIN	Room 310	(602) 926-3560
David Livingston	28	R	Email: DLIVINGSTON	Room 222	(602) 926-4178
Jennifer L Longdon	5	D	Email: JLONGDON	Room 115	(602) 926-3264
David Marshall, Sr.	7	R	Email: DMARSHALL	Room 316	(602) 926-3579

Arizona Legislature - House

Name	District	Party	Email	Room	Phone
Teresa Martinez -- *Majority Whip*	16	R	Email: TMARTINEZ	Room 207	(602) 926-3158
Christopher Mathis	18	D	Email: CMATHIS	Room 337	(602) 926-3138
Cory McGarr	17	R	Email: CMCGARR	Room 304	(602) 926-3630
Steve Montenegro	29	R	Email: SMONTENEGRO	Room 205	(602) 926-3635
Quang H Nguyen	1	R	Email: QNGUYEN	Room 226	(602) 926-3258
Analise Ortiz	24	D	Email: ANALISE.ORTIZ	Room 335	(602) 926-3633
Barbara Parker	10	R	Email: BPARKER	Room 308	(602) 926-3681
Jacqueline Parker	15	R	Email: JPARKER	Room 129	(602) 926-3375
Jennifer Pawlik	13	D	Email: JPAWLIK	Room 118	(602) 926-3193
Kevin Payne	27	R	Email: KPAYNE	Room 110	(602) 926-4854
Michele Peña	23	R	Email: MPENA	Room 342	(602) 926-3696
Mae Peshlakai	6	D	Email: MPESHLAKAI	Room 116	(602) 926-3708
Beverly Pingerelli	28	R	Email: BPINGERELLI	Room 131	(602) 926-3396
Marcelino Quiñonez	11	D	Email: MQUINONEZ	Room 318	(602) 926-3285
Athena Salman	8	D	*Resigned on 01/01/24. No reason provided.*		
Mariana Sandoval	23	D	Email: MSANDOVAL	Room 326	(602) 926-3740
Judy Schwiebert	2	D	Email: JSCHWIEBERT	Room 120	(602) 926-3390
Keith Seaman	16	D	Email: KSEAMAN	Room 119	(602) 926-3760
Amish Shah	5	D	Email: ASHAH	Room 123	(602) 926-3280
Austin Smith	29	R	Email: AUSTIN.SMITH	Room 113	(602) 926-3831
Stephanie Stahl Hamilton	21	D	Email: SSTAHLHAMILTON	Room 333	(602) 926-3279
Leezah Elsa Sun	22	D	Email: LSUN	Room 325	(602) 926-3881
Laura Terech	4	D	Email: LTERECH	Room 323	(602) 926-3894
Ben Toma -- *Speaker*	27	R	Email: BTOMA	Room 223	(602) 926-3298
Stacey Travers	12	D	Email: STRAVERS	Room 332	(602) 926-3917
Myron Tsosie	6	D	Email: MTSOSIE	Room 339	(602) 926-3157
Betty J Villegas	20	D	Email: BVILLEGAS	Room 324	(602) 926-3027
Julie Willoughby	13	R	Email: JWILLOUGHBY	Room 306	(602) 926-4153
Justin Wilmeth	2	R	Email: JWILMETH	Room 111	(602) 926-5044

Arizona Legislature - Senate

Name	District	Party	Email	Room	Phone
Lela Alston	5	D	Email: LALSTON	Room 315	(602) 926-5829
-- *Minority Caucus Chair*					
Ken Bennett	1	R	Email: KBENNETT	Room 303	(602) 926-5874
Shawnna Bolick	2	R	Email: SBOLICK	Room 302	(602) 926-3314
Sonny Borrelli	30	R	Email: SBORRELLI	Room 212	(602) 926-5051
-- *Majority Leader*					
Flavio Bravo	26	D	Email: FBRAVO	Room 313	(602) 926-4033
Eva Burch	9	D	Email: EBURCH	Room 314	(602) 926-3374
-- *Minority Whip*					
Frank Carroll	28	R	Email: FCARROLL	Room 301	(602) 926-3249
Eva Diaz	22	D	Email: EVA.DIAZ	Room 311	(602) 926-3473
Denise "Mitzi" Epstein	12	D	Email: MEPSTEIN	Room 213	(602) 926-4870
-- *Minority Leader*					
David C. Farnsworth	10	R	Email: DFARNSWORTH	Room 303	(602) 926-3387
Brian Fernandez	23	D	Email: BFERNANDEZ	Room 312	(602) 926-3098
Rosanna Gabaldón	21	D	Email: RGABALDON	Room 305	(602) 926-3424
Sally Ann Gonzales	20	D	Email: SGONZALES	Room 314	(602) 926-3278
David Gowan	19	R	Email: DGOWAN	Room 300	(602) 926-5154
Theresa Hatathlie	6	D	Email: THATATHLIE	Room 311	(602) 926-5160
Anna Hernandez	24	D	Email: ANNA.HERNANDEZ	Room 308	(602) 926-3492
Jake Hoffman	15	R	Email: JAKE.HOFFMAN	Room 306	(602) 926-3292
Steve Kaiser	2	R	Resigned 06/22/23		
John Kavanagh	3	R	Email: JKAVANAGH	Room 200	(602) 926-5170
Anthony Kern	27	R	Email: AKERN	Room 304	(602) 926-3497
Sine Kerr	25	R	Email: SKERR	Room 212	(602) 926-5955
-- *Majority Whip*					
Christine Marsh	4	D	Email: CMARSH	Room 315	(602) 926-3184
Juan Mendez	8	D	Email: JMENDEZ	Room 213	(602) 926-4124
-- *Assistant Minority Leader*					
J.D. Mesnard	13	R	Email: JMESNARD	Room 309	(602) 926-4481
Catherine Miranda	11	D	Email: CMIRANDA	Room 313	(602) 926-3413
Warren Petersen	14	R	Email: WPETERSEN	Room 205	(602) 926-4136
-- *President*					
Wendy Rogers	7	R	Email: WROGERS	Room 304	(602) 926-3042
Janae Shamp	29	R	Email: JSHAMP	Room 302	(602) 926-3499
Thomas "T.J." Shope	16	R	Email: TSHOPE	Room 310	(602) 926-3012
-- *President Pro Tempore*					
Priya Sundareshan	18	D	Email: PSUNDARESHAN	Room 303A	(602) 926-3437
Raquel Terán	26	D	*Resigned 04/13/23*		
Justine Wadsack	17	R	Email: JWADSACK	Room 307	(602) 926-3106

Get Involved . . .
Volunteer!

As a NAIFA member, you have the power to make a difference. Exercise that power by volunteering. At the core of every great association are great volunteers. In addition, by volunteering, you will have an influence on the future of our profession.

Volunteering is a great way to develop your leadership skills. Networking within your state gives you the perfect opportunity to take the lead when you work closely with others toward a common goal. Moreover, dynamic peers and seasoned mentors energize you about your profession.

So, how do you develop leadership skills? You do it by observing others to learn from their successes and mistakes. A leader can be interpreted as someone who sets direction in an effort and influences people to follow that direction. As a volunteer you will have the opportunity to interact and lead your peers on many levels. One way to accomplish this is by participating in your state meetings and events.

What else can volunteering do for you? It can help you develop a strong network of contacts that you can turn to when needed. You gain perspective on your profession by truly getting to know others and the challenges they face. You also gain new ideas on how to relate to others and how to sell your ideas.

How do I get involved?

You can participate in your state without giving your life over to it. You can say yes to the amount of work that fits your schedule. Call 480-661-6393 and tell us you would like to get involved. Let us know your interests, your skills and talents, share your ideas and opinions on the issues that affect you and your business, and most importantly let us know how much time you have to give each month. This will help the association place you in the role that best suits you!

Now that you know why it is important to volunteer and how it can positively change your career and business, what are you waiting for? Volunteer today and make a difference!

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sentinel program

Sentinel Members are individuals who are willing to go beyond the ordinary, with a monetary contribution to NAIFA Arizona.

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Member Recognition

Advisor of the Year

— HALL OF FAME MEMBERS —

*Deceased

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2010	Harry E. Markham, LUTCF, CSA
2011	Philip L. Solinsky, LUTCF
2012	Lars D. Hansen, LUTCF
2013	unavailable
2014	Thomas D. Hegna, CLU, ChFC, CASL
2015	Andrew G. Dzurinko, CLU, ChFC
2016	Diana Brettrager, CIC, FSS, LUTCF
2017	Tracy L. Jones
2018	unavailable
2019	David R. Kroll, CLU, ChFC, LUTCF
2020	unavailable
2021	D. Michael Ford
2022	Michael A. Sandoval, CLU, ChFC
2023	Kenny Ziegler, ChFC, LUTCF

Advisor of the Year

Kenny Ziegler

It was the summer of 1993; I had finished college the year before and was enjoying my Scottsdale bartending job. My dad, who had been in the insurance business for 14 years at that point, encouraged me to apply for a job as an Insurance Agent. He said they were hiring and thought I would be a good fit. At the time, I was running the bar with another employee, and he just turned 30, so old! I thought to myself, I did not go to college to be a 30-year-old bartender. If it doesn't work out, I can always go back behind the bar! I applied, passed all the tests, and was hired. I remember when I completed my 10-week contest, they flew us back to Illinois for some more training and to celebrate our successes. It was then that I heard that 75% of all agents fail in the first 2-3 years. There were 8 of us in that class, and I finished 3rd. Even with my ASU math, I could figure out that I was already on the outside looking in. At that time, I knew I was going to have to work much harder as this was going to be more difficult than I imagined.

I spent the first 5 years of my career plodding along, doing just enough to pay the bills and barely avoiding getting terminated. When one day, a local NAIFA representative spoke at our company's sales convention. I had no idea who or what NAIFA was, not knowing we even had a professional association. I loved the idea of meeting with other insurance agents and learning successful sales practices. It wasn't long before I completed my LUTCF and ChFC, served on various committees of NAIFA-Tri-City including being President, and finally being the President of NAIFA-AZ.

Looking back on my now 30-year career, there are so many people to thank, but these stood out the most. First, my dad, without him I never would have started in this business. I know he is looking down and smiling at how successful I have been. Lars Hansen was the local NAIFA representative that spoke that day and encouraged me to sign up. He is the reason I joined NAIFA! Doug McMurray was the instructor for my 1st LUTCF class. He was kind, positive, and made me believe that I could make a lasting career out of this.

Lastly, I'm going to leave you with the three rules that I have followed. I do believe they have shaped my career and allowed me to retain so many of my clients. One, return every phone call. Two, do what you say you are going to do. Three, tell the truth. Follow these simple rules and you too can have a great career as an insurance agent!

It has been my pleasure to serve you and NAIFA. I am very honored and proud to receive this award.

Thank you!!!

Congratulations, David Sewell, on your Retirement!!

Steve Goucher of Farm Bureau Financial Services and NAIFA-Arizona wish to take this opportunity to recognize Dave for his 30 years of Service.

Dave has demonstrated a high level of professional standard for his company, his clients and this association.

It is our privilege to extend our best wishes to Dave for his future endeavors!

NAIFA ARIZONA

2023 Recipient of the Richard J. Martinez Community Service Award

Andrew G. Dzurinko, CLU, ChFC

NAIFA East Valley President
NAIFA Arizona Agent of the Year 2015
NAIFA Arizona 2022 Community Service Recipient
Member; UFW American Legion and Vietnam Veterans of America
NAIFA member since 1979
FSP (Financial Service Professionals) since 1983
Author of 3 books: *The Power of Optimism, Laugh Out Loud,* and *Inspired*

Andy Dzurinko grew up in the once-thriving steel town of Monessen, Pennsylvania, twenty-seven miles south of Pittsburgh. From the time he played in the local Midget Football League, sports have always played a big part in Andy's life. He was an All-State lineman for the Monessen High School football team that won a conference championship in 1960. He went on to Bucknell University where, in Andy's senior year, the Bisons won the Lambert Cup, symbolic of Eastern small college football supremacy. For his many athletic accomplishments, he was inducted into Pennsylvania's Mid Mon Valley All Sports Hall of Fame in 2009.

Commissioned a second lieutenant, he served two years of active duty with the U.S. Army, including a tour in Vietnam. Returning to civilian life, he earned a masters' degree at the University of Pittsburgh where he began a ten-year coaching career that took him ta Williams College and Brown University before entering the insurance industry in 1978.

Andy joined AUL in 1980 and was director of training and regional vice president of agencies for American United Life Insurance Company in Indianapolis before relocating to Arizona in 1988 to become a general agent and personal producer for AUL. He has qualified for the Million Dollar Round Table and the National Quality Award, and been accredited as a chartered life underwriter and chartered financial consultant by The American College.

While his playing and coaching days are behind him, Andy maintains an active workout regimen and ran in his first marathon at the age of fifty-six. His bucket list after age sixtyfive included: hiking Mt. Whitney, the Half Dome in Yosemite, the Grand Canyon in the United States; and, internationally, Mt. Kilimanjaro in Africa, Machu Pichu in Peru, Mt Blanc in France, and Walking the El Camino in Spain.

While serving as executive director of Arizona Governor's Council on Health, Physical Fitness and Sports, he received the Outstanding Council Member Award from the National Association. Always willing to give back to his community with such groups as Tempe Sister Cities, Sigma Chi Fraternity Alumni, Bucknell Alunrni, and the National Football Foundation, he has headed up the Frank Kush Youth Foundation for the past thirty years.

Monthly Top Recruiter Program for 2023

We are delighted to announce that we have a fun membership program for Q4 2023 called "Top Recruiter". The Top Recruiter each month will win a $100 gift card to thank you for your referral because, as you fully know, there is no greater compliment than your recommendation. The Top Recruiters will be listed on the Member Portal page and recognized throughout NAIFA Nation.

The program was so successful last year on a quarterly basis, that we are making it a monthly content. Top Recruiters are identified by having the new member list you in the referral field, or a communication to that effect. Only NAIFA members are eligible for the prize and you must be active to receive the prize.

Q4 2023 Recruiter

Shout out to **Undrea Smith** from Arizona who was the recipient of the Q4 Top Recruiter winner which goes to the member who recruits the most members, or provides extraordinary service to the membership of the association. Undrea was announced during the January chapter leaders call.

NAIFA Quality Awards
2022 Industry Award Winners

MULTILINE
Julie Jakubek, MBA

FINANCIAL ADVISING & INVESTMENTS
Scott F. Bennett, CLF, LUTCF

LIFE INSURANCE & ANNUITIES
Lyle A. Deo, CLU, ChFC, CLTC

NAIFA has the Largest Grassroots Program in the Financial Services Industry

We've introduced a new training course for members to gain skills and confidence in the advocacy process. Members who complete all three courses earn NAIFA's Financial Security Advocate badge.

Grassroots Training 101: Starting Your Advocacy Journey
This introductory-level module introduces key concepts and resources to help you get started as a Grassroots Advocate using NAIFA's tools and experience.

Grassroots Training 201: Expanding Your Advocacy Skills
The intermediate-level module helps NAIFA members improve on their advocacy skills by learning how to navigate more challenging relationships with lawmakers, as well as how to build the Grassroots Advocacy program using Site Visits and recruitment strategies.

Grassroots Training 301: Grasstops Strategies
The advanced-level module is for NAIFA members that want to move to the next level of advocacy by becoming "grasstops" contacts, hosting political fundraisers, and potentially even running for office themselves.

Arizona Financial Security Advocate Graduates

Judy Aguilar-Woertz
Heather Bergman
Diana Brettrager
Robert Bryant
Patricia Chesebrough
Barry Cook
Michael Eibeck
David Ford
Toni Gonzales
Stephen Goucher
Rebecca Harper
Tracy Jones
Alan Kifer
Michael Klein
Seth Krasne
Sue Karaja
Connie McAdams
Barry McBride
Jennifer Mauer
Adam Roth
Michael Sandoval
David Sewell
Philip Solinsky
Amber Stitt
Meg Vecchi
Robert Wernecke
Kenny Ziegler

It broke our hearts to lose you,
but you didn't go alone;
For part of us went with you,
the day God called you home.

Alvin Dattner, CLU

AMBER

NAIFA Member Spotlight: Amber's Path to Impactful Leadership

Amber's journey in the financial services sector is deeply rooted, having been surrounded by entrepreneurial spirits throughout her life. As the eldest of seven siblings, she's carried a sense of responsibility and an unwavering desire to help others chart their unique paths to success.

Professional Journey

With over a decade of industry experience, Amber is a thriving business owner specializing in disability, life, and extended care planning. Her primary focus revolves around collaborating with medical professionals and business owners. Over the last five years, she's expanded her business horizons, even venturing into the world of video podcasting to provide financial guidance through both digital and in-person platforms. She's now a sought-after speaker at conferences, sharing insights on achieving Financial Freedom and innovating in the digital age.

Passion for Helping Families

Amber's passion comes from seeing firsthand how families handle unforeseen hardship, as her family suffered a tragedy back in 1990.

Amber's life's mission is to ensure that others are well-prepared to face the unexpected, empowering them to manage life's trials with strength and determination.

Leadership Role with WIFS and NAIFA

On November 1, 2023, Amber Stitt stepped into the role of President for the Phoenix Chapter of Women in Insurance and Financial Services (WIFS). Her enthusiasm for legislative involvement is tireless, and she looks forward to both continuing her personal engagement and motivating her colleagues to join her in this vital endeavor.

In her role as a Financial Security Advocate of NAIFA, Amber is determined to continue supporting NAIFA's message of collaboration and industry transformation. She's actively working with Adam Roth, the current President of NAIFA Arizona, to make this vision a reality along with National NAIFA. She and Adam have already spoken with schools about financial literacy together through the JA program and will continue to support this effort.

Commitment to Making an Impact

Equipped with her unique "Pathways of Peak Performance," a five-step framework that she teaches on her podcast, she's set to embark on an extraordinary journey to provide leadership within her community and other chapters across the nation.

Philanthropic Endeavors

Amber's dedication also extends to additional philanthropic efforts. She volunteers her time with Junior Achievement and supports Live and Learn, an Arizona-based organization dedicated to breaking the cycle of generational poverty. Through these endeavors, she actively promotes financial literacy and advocates for the next generation of children and advisors, as well as those navigating transitions in their professional lives.

Amber also plays a supporting role on a task force with the American College, focusing on creating effective pathways for individuals entering the industry or navigating career transitions.

Life Beyond Work

Amber and her family seize every opportunity to travel to warmer destinations.

Reprinted from NAIFA Advisor Today.

When Barbara Micheletti, MS, Gerontologist, became a business insurance advisor in 2006, she brought with her a unique skillset. She has a background in Gerontology and is well-versed in the challenges—both financial and emotional—that aging issues present to individuals and families.

During her time as an insurance advisor, Micheletti discovered that her clients who were struggling with aging and money issues weren't receiving the guidance they needed. "What I saw over the years were the business owners and their families who were experiencing financially devastating aging and money issues that they hadn't prepared for," she shares. "They'd neither financially nor emotionally prepared for what I call inevitable aging issues with a financial professional." She wanted to help those families.

A Resource to Agents and Advisors

In her time training as a financial planner, she set out to teach insurance and financial service professionals how to identify which aging issues were most likely financially crippling by asking questions such as, "Are you going to become a family caregiver in the future? If so, where will that money come from? Will you have to quit your job or financially contribute on top of being the unpaid caregiver? If so, who will contribute to your retirement account? Or, what if your spouse develops Alzheimer's? Will you be the caregiver, and if so, who will pay, where will you live in old age and where will the money come from?"

Making a Difference

One of Micheletti's passions is educating professionals about senior financial fraud. The risk of experiencing financial fraud has reached epidemic levels as our society rapidly ages and as Boomers are increasingly retiring with more time to spend online or on the phone, says Micheletti. "That's another area where I'm able to expertly help financial and insurance professionals understand why, as a trusted fiduciary, they need to be that extra set of 'eyes and ears' for their clients—to be able to identify fraud, to recognize red flags, to mitigate the risk of being frauded, or, if they can't stop it, to help them pick up the emotional pieces afterward because the elderly client's emotional aftermath of fraud is terrifying."

Joining NAIFA

"I joined [NAIFA] to support the men and women advisors and agents whose products and services deserve and need to be elevated and offered to people around the country." She continues, "Many people don't realize the portfolio-protecting value and advice that insurance professionals provide in offering risk-transfer hybrid products and services, nor understand the value in comprehensive financial planning that financial planners provide to help people financially and emotionally plan into their old age and beyond, and, unfortunately, most don't know how to find these financial caregivers."

Micheletti is especially passionate about helping women increase awareness of their own financial planning needs, particularly planning in advance to have a financial safety net into their old age. She shares, "Women stand to inherit 47% of the country's $84T 25-year wealth transfer, so they have a reason and need to work with a trusted professional. They typically live on average 7-8 years longer than men, develop more chronic illnesses including Alzheimer's because of their longevity, earn less than men, bring fewer financial assets into retirement, and have historically been excluded from the financial planning process."

Outside of the Office

When she's not working, Micheletti is very involved in her community. She is a leader in the WIFS-Phoenix chapter, the Phoenix Financial Planning Association, and at the Gerontological Society of America (GSA), where she is one of the founders of the Fitness, Exercise, and Wellness (FEW) group, which focuses on healthy longevity research.

PODCAST HOST:
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TOPIC:
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Guest: Undrea Smith

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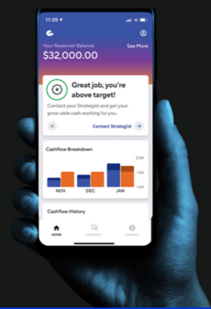

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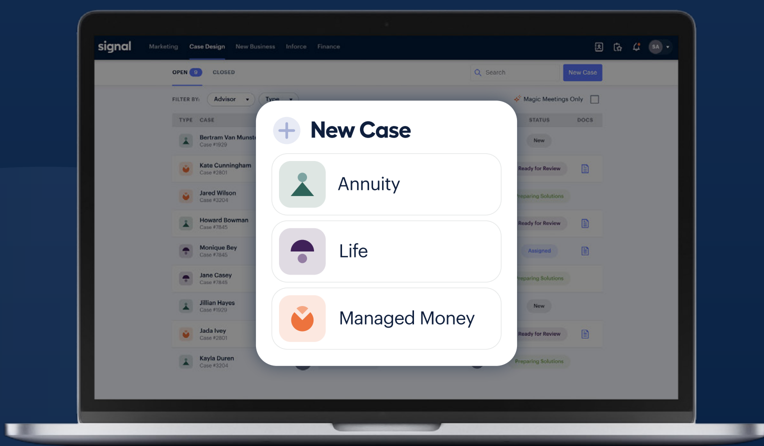

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acronyms

AALU	Association for Advanced Life Underwriting
ACLI	American Council of Life Insurance
ALHA	Association of Life & Health Administrators
CAP	Chartered Advisor in Philanthropy
CASL	Chartered Advisor for Senior Living
CIC	Certified Insurance Counselor
CEBS	Certified Employee Benefits Specialist
CFP	Certified Financial Planner
ChFC	Chartered Financial Consultant
CLF	Chartered Leadership Fellow
CLU	Chartered Life Underwriter
CLTC	Certified Long Term Care
COT	Court of the Table
CPCU	Chartered Property & Casualty Underwriter
CSA	Certified Senior Advisor
FINRA	Financial Regulatory Authority
FLMI	Fellow Life Management Institute
FSS	Financial Services Specialist
GAMA	General Agents and Managers Association/International
HIAA	Health Insurance Association of America
IAFP	International Association for Financial Planning
LIMRA	Life Insurance Marketing and Research Association
LACP	Life and Annuity Certified Professional
LOMA	Life Office Management Association
LTCP	Long Term Care Professional
LUTC	Life Underwriters Training Council
LUTCF	Life Underwriters Training Council Fellow
MDRT	Million Dollar Round Table
MSFS	Masters of Science in Financial Services
NAHU	National Association of Health Underwriters
NAIC	National Association of Insurance Commissioners
NAIFA	National Association of Insurance and Financial Advisors
NAIFAPAC	NAIFA Political Action Committee
NQA	National Quality Award
NSAA	National Sales Achievement Award
REBC	Registered Employee Benefits Consultant
RFC	Registered Financial Consultant
RHU	Registered Health Underwriter
RIA	Registered Investment Advisor
RICP	Retirement Income Certified Professional
SEC	Securities and Exchange Commission
TOT	Top of the Table (MDRT)

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Rothschild, Stephen O.
Ryan, Robert P.
Sabol, Paul
Sahoo, Sub
Schaeffer, David
Schloss, Larry L.
Shultz, Thomas
Smith, Raymond
Solinsky, Philip
Spivak, Stuart J.
Stern, Daryl
Teel, Harold L.
Thompson, Theodore
Trucksess, George
Usher, Bruce H.
Van Houten, Timothy
Vazirani, Anil
Wagenhals, Heather
Walden, Edward D.
Wallace, James D.
Wiebers, Gerald
Williams, Bill
Wilson, Cliff F.
Wiltse, Debbie
Winters, Nick
Woods, Mark H.

AAA of Arizona

Oltmans, Bradley S.

A and A Media Group

Sisson, Ky

Advisors Choice Insurance Brokerage

Ross, Ronald K.

AIM Marketing & Insurance Services

Bress, Allen D.

Allstate

Bautista, Cristal
Dawson, Haydee
Jakubek, Julie
Morrison, Jessica
Raso, Gabby

American Family Insurance
Barker, Michael
Wisniewski, Daniel

American National
Alexander, Nancy M.
Barteau, Stephen B.
Cathcart, Kelly S.
Dears, Robin
Drake, Curtis
Hansen, Lars D.
O'Neal, Jon
Wood, Peter
Woods, Megan M.

American Savings Life
Frahm, Michael L.

American United Life
Dzurinko, Andrew G.

Ameriprise Financial Services
Darwin, Dewey

Ameritas
Stitt, Amber

ARP Tax & Estate Planning
Spar, William E.

Ash Brokerage
Pilger, Steve

Benefit Market Place
Harmes, Mitch

Black Gould & Associates
Baker, Dutch
Gould, William B.
Kanoza, Becky

Clear Direction Investments
Stoltz, Randall B.

Colonial Life
Roth, Adam
Williams, Andrea

Cornerstone Retirement Resources
Cox, Christopher

Cambridge Financial Center
Clarke, J. Brandon
Pyles, Eric

The Chittendens
Chittenden, David P.

Country Financial
Bennett, Scott
Gurton, Christopher
Guzman, Heather
Jackson, Eric D.
Jensen, Scott
Nasca, Scott
Pinter, Mark M.
Robinson, Teresa L.
Shone, Matthew T.

COVR Financial Technologies
Westfall, Scott

E4 Insurance Services
Serold, Brady

East Valley Retirement
Griffin, Dixie
Kelly, Kim
Marsh, Alexander
Smith, Julianne
Smith, Undrea
Wilhemsen, Venetia

ECA Financial Services
Martin, Lisa M.
Wernecke, Robert J.

Equitable
Kurtz, Margaret
Riesgo, Jr., Fred

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Atkinson, John
Cotten, Jan
Doyle, Juli J.
Gallegos, Craig
Gauzens, Isis
Kanyur, Rob
Pasic, Stefany

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Laster, Liz
Lockard, Dorothy R.
Mace, Greg A.
Naber, Verl F.
Schaal, Nicole
Sewell, David A.
Simpson, William
Tousley, Christopher M.

Farmers Insurance Group
Couch, JR
Smith, Denny

Fidelity Investments
Meeks, Chance E.

First Financial Equity Corporation
Deo, Lyle

Gateway Insurance Group
Kennedy, Tamerlane

Guardian/Pacific Advisors
Berger, W Craig
Bregman, Marc A.
Vecchi, Meg R.

Guardian - WestPac Wealth Partners
Martinka, Bryan G.
Quitno, Kirk D.
Stevens, William J.

Health Markets Insurance Agency
Gulledge, Scott

Highland Capital Brokerage
Gelder, James R.

Horace Mann
Edman, Steven J.
Kruse, Jennifer
Parker, Jackson D.

Integrated Financial Group
Kelly, John K.

Interrupting Aging, LLC
Micheletti, Barbara

Johnson Insurance Services/ Crest Insurance Group
Johnson, Noreen

Knights of Columbus
Low, David
Lutz, James E.
Raso, Nathan

Liberty Mutual
Kawar, Tina

Life Secure
Root, Sue

Lincoln Financial Advisors
Magdon, Donald J.

LFA/Sagemark
Shaw, Richard G.

Lockton Affinity
Meredith, William

LTCR Pacific Agency
Veta, Michael L.

M.A.S. Group
Rosalez, Donald

MassMutual
Beyer, Richard W.
Bottolfsen, Eric
Danzy, Jabari
Dollarhide, Jeffrey C.
Driscoll, Aaron
Goldman, Johnathan D.
Goldman, Victor
Grimaldi, John D.
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Janower, Todd
Kroll, David R.
Kuraja, Sue
Mattison, Britni
Rowland, Tom
Sandidge, Jr, F. Edward
Scheid, Joe W.
Thomas, Michael J.
Zajdzinski, Chris

Modern Woodmen
Ceschin, Daniel A.

Montoya Group
Green, Carmen T.

MS Insentra
Yates, Victor

Mutual of Omaha Companies
Lizza, Louis
McAdams, Connie
Sandoval, Michael
Whitehurst, Carin

Mutual of Omaha Mortgage
Ahrenholtz, Ted

National Life Insurance Company
Stilb,Timothy J.

New York Life
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Ben-Dov, Ronen
Braden, Marc S.
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Chan, Peter
Cook, Barry A.
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Diaz, Jr., Edward
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Hartman, Robert A.
Hernandez, Hector
Iniguez, Vincent
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Krasne, Seth J.
Lai-Chan, Yuk-Yi Susan
Loeffler, Dwight E.
Maggs, Janice
Mindak, Steven T.
Nash, Yara T.
Nemger, Michael A.
Pfeiffer, Geoff
Porro, Drew Lucien
Ramazanoglu, Kuddusi D.
Rayroux, James
Sanchez, Javier V.
Skellan, Daniel E.
Smith, Gordon M.
Trautman, Reed P.
Tucker, Charles A.
Velez, Maria
Vest III, Robert L.
Wise, Pamela

Nexus Wealth Management
Isaacs, Craig A.

Northwestern Mutual
Hubbard, Thomas W.
Kosnick, Jordan T.
McEvoy, Dennis P.
Modjeski, Clarence
Morris, Joseph A.

Ohio National
Gonzales, Toni L.

Phocus FSG
Janson, Clayton M.

Physicians Mutual Insurance
Johnson, Timothy
Smith, Michael P.
Story, Mike

Power Women Investing
Ronstadt, Tiana

Principal Financial Group
Dhaenens, Seth
Vetrano, Thomas R.

Retirement Planning Services
Diamond, Michele

San Marcos Insurance Group
Swan, Sherri
Ziegler, Kenny

Sentinel Retirement Services
Schwizer, Stacey

Simplicity
Ford, D. Michael
Ford, Paul E.
Stahl, Mary M.
Stahl, Michael P.

Spence, Cassidy & Associates, LLC
Cassidy, William B.
Clements, Daniel F.
Davis, Jerlynne
Eibeck, Michael E.
Kolesar, Charles R.
Kolesar, Stephen M.
Reithmann, Tracie

State Farm
Aquilar-Woertz, Judy
Buchmann, Richard
Carillo, Andy T.
Clemons, Delores
Cunningham, Kevin
DeBerry, Tom
Ford, Vandy
Gaboury, Brett S.
Hagberg, Donald
Heffentrager, Timothy R.
Hess, Mark
Johnson, Pam
Johnson, Steven M.
Kelley, Shari
Lang, John W.
Lane, Lance
Lucero, Cami
McDermid, Aaron
McGraw, Kevin
Nelson, Deana M.
Nuetzi, Cathy
Otolski, Amy
Shkapich, Dan
Swanson, Dondrell
Tatro, Tom

Sun Cornerstone Group
McBride, Barry A.
Moore, Lydia

Thrivent Financial for Lutherans
Brooks, Brian W.
Jaramillo, Jesus
Kolzow, Jeffrey C.

Truluma
Rickert, Alec

Universal Producers Group
Gil, Rodrigo

Unkefer Associates
Hilkemeier, Chad P.

Wisdom Wealth Investment
Bottle, Blake, ChFC

NAIFA-Arizona wishes to *welcome* its newest members.

Cristal Bautista – Allstate
Marc Bregman – Bregman Financial
Curtis Drake – American National
Jonathan Goldman – Goldman Financial
Heather Guzman - Country Financial
Eric Jackson – Country Financial
Jesus Jaramillo – Thrivent
Susan Johnson – Independent
Kim Kelly – East Valley Retirement
Jennifer Kruse – Horace Mann
Lance Lane – State Farm
Donald Magdon – Lincoln Financial Group
Alexander Marsh – East Valley Retirement
Bryan Martinka – WestPac Wealth
Kevin McGraw – State Farm
Cathy Nuetzi – State Farm
Kirk Quitno – WestPac Wealth Partners
Gabby Raso – Allstate
Nathan Raso – Knights of Columbus
Tiana Ronstadt – Power Women Investing
Sue Root – Life Secure
Javier Sanchez – New York Life
Brady Serold – E4 Insurance Services
Heather Wagenhals – Unlock Your Wealth
Venetia Wilhelmsen – East Valley Retirement
Andrea Williams – Colonial Life
Megan Woods – American National

2024 FSP New Members

Ted Ahrenholtz – Mutual of Omaha Mortgage
Blake L. Bottle – Wisdom Wealth Investment
Richard W. Buchmann – State Farm
Stephen C. Captain - Independent
Seth Dhaenens – Principal Financial Group
David A. Dorn - Independent
John R. Driskill - Independent
James R. Gelder – Highland Capital Brokerage
Irwin Gorman - Independent
Duane C. Hartzler - Independent
Timothy P. Heffentrager – State Farm
Thomas J. Hruska - Independent
Thomas W. Hubbard - Northwestern Mutual
Craig A. Isaacs – Nexus Wealth Management
Todd Janower - MassMutual
Scott Jensen – Country Financial
Paul F. Johnson - Independent
Shari M. Kelley – State Farm
John K. Kelly – Integrated Financial Group
Margaret Kurtz - Equitable
William Meredith – Lockton Affinity
Bradley S. Oltmans – AAA of Arizona
Amy Otolski – State Farm
Geoffrey E. Pfeiffer – New York Life
Steve Pilger - Ash Brokerage
William J. Rooney - Independent
Ronald K. Ross - Advisors Choice Brokerage
Stephen O. Rothschild - Rothschild & Sale
Robert P. Ryan - Independent
Sub Sahoo - Independent
Larry L. Schloss – Independent
Richard G. Shaw – LFA/Sagemark
Harold L. Teel - Independent
Edward D. Walden - Independent

Industry Association Addresses and Telephone Numbers

AMERICAN COUNCIL OF LIFE INSURERS (ACLI)
101 Constitution Ave., N.W.
Washington, D.C. 20001 (202) 624-2000
www.acli.org

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300 Day Hill Road
Windsor, CT 06095 (860) 285-7789
www.limra.com

MILLION DOLLAR ROUND TABLE (MDRT)
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Park Ridge, IL 60068 (847) 692-6378
www.mdrt.org

NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS (NAIFA)
www.naifa.org

NAIFA POLITICAL ACTION COMMITTEE (IFAPAC)
www.naifa.org/advocacy/ifapac

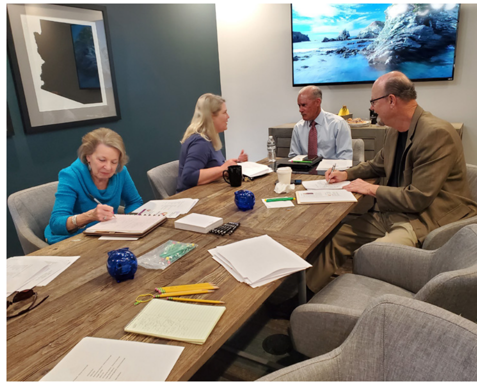
1000 Wilson Boulevard #1890
Arlington, Virginia 22209 (877) 866-2432

THE AMERICAN COLLEGE
270 Bryn Mawr Avenue
Bryn Mawr, PA 19010 (610) 526-1000
www.theamericancollege.edu

Arizona Department of Insurance
100 N. 15th Avenue #102
Phoenix, AZ 85007 (602) 363-3100
www.insurance.az.gov

Who's Who in photos

Leadership Involvement

Teamwork


Leadership Involvement *continued*

Programs Participation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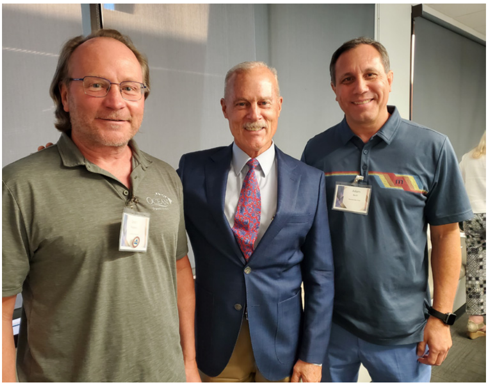


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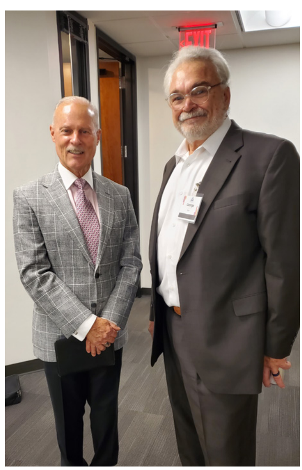
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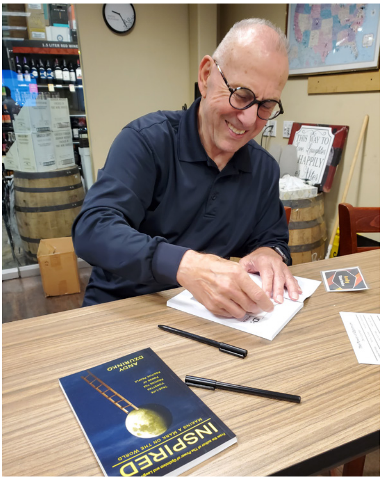


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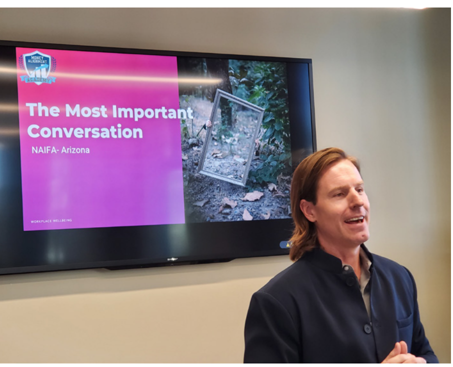
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For more information on the Centers contact:

Carroll Golden, CLU, ChFC, CLTC, CASL, LECP, FLMI, LACP
Executive Director – NAIFA Centers for Excellence cgolden@naifa.org
817-709-6859

NAIFA's Centers of Excellence

NAIFA's five Centers of Excellence take a customized approach to deliver unique and relevant information to today's advisors. Each Center is focused on a specific insurance and finance subject area and provides a platform for your specialized print and media content. As a sponsor of one of NAIFA's Centers, you will be provided with multiple opportunities to expand your business through outreach to NAIFA members.

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Created by NAIFA and the Society of Financial Service Professionals, the Advanced Practice Center (APC) provides the most up-to-date information and access to your expertise for complex cases. Sponsor participation provides thought leadership and advanced case content relevant to agents and advisors working to meet their clients' advanced planning needs.

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Talent Development Center – tdc.naifa.org

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For more information, contact CalSurance at:

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Orange, CA 92868

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info@calsurance.com

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Loyal Member Since 2002
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About

SAM helps Agents/Advisors stay focused, organized, disciplined, and develop the right habits to achieve their GOALS...and Managers are better able to coach, develop talent, lead, and build a positive, high-performance culture.

Sales Activity Management named and pioneered the Activity Management industry to inspire and empower Agents/Advisors to succeed and Managers to lead....and to make a difference in this noble profession. How? By providing custom tools and resources that help you spend time wisely and achieve your goals...by helping you manage your Sales Activities, because you cannot (literally) manage Time. It is the Secret of How.

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TIFIN Wealth is an AI-driven platform empowering personalization at scale across investments, financial planning, personality assessments, risk tolerance, client communication, and turnkey growth marketing.

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You know that you should survey your clients, NEXA Insights Client Intelligence Platform helps you get the most out of the process.

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Kelsey National Dental Insurance

Through NAIFA's partnership with Kelsey National, NAIFA members now have access to quality dental insurance with DentalInsurance.com.

Kelsey National Disability Insurance

In 1997 NAIFA and Kelsey National Corporation teamed up to bring members the Advantage Plus Disability Income Insurance Protection Plan. This insurance plan is now offered to NAIFA members at a discount.

Kelsey National Health Insurance

Through NAIFA's partnership with Kelsey National, NAIFA Members now have a valuable resource for health insurance with GetMedical.com.

LegalShield Affordable Legal Services

Protect your business and assets with accessible and affordable legal representation. We offer full-service coverage and identity theft protection that saves hundreds compared to onsite counsel.

30% Off Select Plans

Lenovo

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Life Happens Pro

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20% Discount

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Accelerate your growth plan, or find a successor for your practice, by leveraging one of the most experienced investment banking teams in the wealth management industry.

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30% Discount

ROL Advisor

ROL Advisor puts your client's life at the center of the conversation. The use of our digital tools and training allows you to shift your focus from return on investment to a focus on Return on Life (ROL).

10% Discount

Streamlined Alternative Investments

Access a wide variety of alternative investments from well-known sponsors. Altigo streamlines the subscription process, helps reduce errors and saves you valuable time—available to you at no cost.

Complimentary - No Cost

Total Administrative Services Corporation

TASC's Universal Benefit Account can also help your business flourish and stand out. Attract, engage, retain, and grow your clients by providing them with a one-of-a-kind benefits solution that grows and adapts right along with their business.

Total HIPAA Compliance

Total HIPAA Compliance prepares health insurance agents, HR professionals, Privacy and Security Officers, healthcare professionals, and subcontractors of Business Associates to meet federally mandated HIPAA compliance regulations.

TravNow

The TravNow Membership Card provides access to one of the most unique memberships available.

Trendrating

Trendrating delivers an unbiased, objective, disciplined "reality check" about the strength and quality of trends necessary to achieve superior performance on a consistent basis.

Free Trial + 15% Discount

Turnkey Public Relations Programs for Advisors

We get financial advisors in the news. Showcase your financial expertise as a trusted media resource. Proven public relations programs that secure the media attention you deserve.

Bonus Media Placements

Turo Car Rental

Why pay more to rent a car? Book a better car at a better value than Enterprise with Turo, the world's largest car sharing marketplace.

Save Up to 35%

UPS Savings Account

Enjoy savings of up to 50% on UPS ground, air, and international express services. Plus, save time and avoid waiting in lines with free UPS Smart Pickup service. Available for new and existing customers.

WebCE

NAIFA and WebCE have partnered to offer NAIFA members a discount on a wide variety of courses--from pre-licensing to continuing education credits.

Weekly Market Commentary Videos

Provide your clients with the only fully white-labeled video commentary designed to cover all aspects of the investment markets for the lowest price possible.

Fast and Simple Business Financing

Rapid Finance offers a wide range of business financing options to meet each business's unique needs. With flexible funding options, easy application process, and speedy approval times, they are sure to find a solution for your business.

Free Tax Savings Analysis

Receive a free tax savings analysis with 1-800Accountant. They'll give you personalized recommendations to lower your tax burden based on your business, industry, and state.

Full-Service Marketing Agency

Impress your clients and prospects with a high impact logo, tagline and corporate materials. By working together, we define your mission, vision and values, getting to the heart of what makes your brand special. Take advantage of exclusive pricing.

White Glove

Get introductions, not just leads. Marketing Done-For-Advisors. We do all the work; you focus on showcasing your authenticity, building trust and credibility to better win new clients or generate referrals.

6:1 Return on Marketing Spend

Winestyr Wine Club

Taste your way through America's best wines with sommelier curated shipments from America's top artisanal wineries automatically delivered to your door.

$40 Off First Shipment

Zoom

NAIFA has teamed up with Zoom, a global leader in the virtual event space, to offer a 15% discount to members.

15% Discount

WHITE GLOVE

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Awesome Clients. Better Marketing. Done for Advisors.

Get introductions, not just leads. Marketing Done-For-Advisors. We do all the work; you focus on showcasing your authenticity, building trust and credibility to better win new clients or generate referrals.

- **Done-For-You.** Free up your time and resources via our end-to-end **Done-For-You marketing platform** from client introductions and appointments to nurturing and referrals
- **Done Better.** Get in front of better clients with reliable, data-driven targeting capabilities combined with premium, best-in-class marketing with an average **6:1 return on marketing spend**.
- **Done with No Risk.** Financial Advisor group and individual educational seminars and webinars, appointments and introductions - Pay only for performance – attendees or appointments. No upfront costs. All backed by our Quadruple Guarantee (4G).

NAIFA-Arizona Working For You:

Government Relations Committee:
Examines proposed legislation and regulations affecting life and health insurance and related financial services introduced in this state and by the federal government. NAIFA-Arizona retains a professional lobbyist to assist in this important effort.

IFAPAC-Arizona Committee (Political Action):
Develops programs and activities that promote contributions to the Association's PAC and NAIFAPAC. The committee seeks to enhance awareness of the purposes and opportunities of NAIFAPAC and IFAPAC-Arizona.

APIC Committee (Political Involvement):
Promotes the involvement in the election of candidates for local, state and national office. The committee attempts to identify and foster the creation of member relationships with elected officials.

Membership Committee:
Develops, coordinates and implements a campaign of membership recruitment and retention.

Professional Development & Education Committee (includes YAT, LILI & CE):
Provides support for professional career development, educational and other benefit programs.

Community Service:
Selects programs/projects in an effort to 'give back' to communities.

Social Media:
Promotes NAIFA-Arizona events and activities on social media outlets.

NAIFA-ARIZONA

Licensing Preparation & Continuing Education

NAIFA-ARIZONA is pleased to offer self study for those interested in becoming licensed agents in Arizona. See www.naifa-az.org for interactive online training or to purchase study manuals.

Established agents can get continuing education through 360 Training. Go to www.naifa-az.org and click on Continuing Education, then click on Virtual University. For any questions call 480-661-6393.

BUILDING FINANCIAL SECURITY IN ARIZONA

FINANCIAL SECURITY FOR EVERY STAGE OF LIFE

Life insurers pay out **$4.6 billion** – **$12.6 million every day** – in life insurance and annuity benefits to Arizona families.

In Arizona, **1.8 million** individual life insurance policies were in force in 2021, averaging **$216,000** in death benefit protection.

Here's how our products protect Arizona residents:

- **Life insurance** safeguards families
- **Retirement savings and personal pensions** provides critical income in retirement
- **Long-term care and disability income insurance** provides income when work is no longer possible
- **Supplemental benefits** fills gaps and covers what health plans don't
- **Paid leave** provides income during time off to care for family

ECONOMIC INVESTMENT INTO ARIZONA

The life insurance industry provides good jobs and long-term investment capital that spurs economic growth. In Arizona, the life insurance industry:

- Generates **64,800** jobs
- Invests **$138 billion** in Arizona's economy, including in commercial, residential and agricultural mortgages, stocks, bonds and more

COMPANIES IN ARIZONA

Arizona's life insurers protect families, businesses and communities:

- **458** licensed to do business in Arizona
- **24** domiciled in Arizona

IMPACT ACROSS AMERICA

Life insurers are a critical safety net in American life, paying **$100 billion** in life insurance benefits in 2021, higher than in any previous year. The life insurance industry:

- Pays out **$2.5 billion** every day
- Protects **90 million** American families
- Generates **2.8 million** jobs
- Invests **$7.9 trillion** in the U.S. economy

AMERICAN COUNCIL OF LIFE INSURERS
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SIMPLICITY
GLENDALE

Why is Simplicity Financial Group one of the fastest growing Financial Services Companies in the US?

Everything we do is about helping Independent Advisors build, scale and capitalize their businesses.

We are not a good fit for every practice, but we would welcome the opportunity to learn about you and your business to determine if we can help you achieve your goals.

Growth-minded advisors who are joining us are seeing significant growth in their businesses.

Give me a call and let's talk.

Mike Ford
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