



# WHO'S WHO

2026



# **GOALS. ACCOMPLISHED.**

## **Solving Your Client Needs Strategically**

- ♣ Life
- ♣ Annuities
- ♣ Long Term Care
- ♣ Critical Illness
- ♣ Disability
- ♣ Asset Protection



### **Life Insurance & Annuities for Foreign Nationals**

- ♣ Foreign Nationals without assets in the United States
- ♣ Foreign Nationals with assets in the United States
- ♣ Indexed, Fixed & Immediate Annuities for Foreign Nationals residing outside the United States
- ♣ Premium Finance programs for high-net-worth Foreign Nationals

### **Large Case, Estate, Business Planning, Advanced Concepts**

- ♣ Challenging financial and medical cases
- ♣ Jumbo cases 100 million plus
- ♣ Pension Max

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### **Brokerage Professionals, Inc.**

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**480-505-2500 \* 480-505-2501 Fax**

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***Celebrating 43 Years in Brokerage!***

# Membership Directory 2026

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](mailto:naifa-az@azis.com)  
Website: [www.naifa-az.org](http://www.naifa-az.org)



Cover Photo: Cliff F. Wilson, CLU, ChFC, LUTCF  
NAIFA-Arizona President 1991/92

## 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.*

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Membership Directory can also be found on NAIFA-Arizona website



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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# Mission Statement



*The Mission of the Chapter is empowering financial professionals and consumers through world-class advocacy and education, and to promote ethical conduct.*

Dear NAIFA Members:

Another year is upon us, and it should be of no surprise that our Industry remains strong and the products and services that we deliver have never been needed more. Yet, consumers remain unsettled, as we maneuver through uncharted economic waters. Unknown personal and business tax rates, health mandates, and government debt remain topics of the day. While it appears, at times, that there may be little that we can do as individuals, collectively, we as an organization have and will continue to have influence over many decisions that impact both the clients and community we serve.

While our voice is still strong, the past decade has taken its toll on membership. NAIFA remains our only lifeline to impact regulatory decisions. Yet, the burden of responsibility is falling on fewer members. The benefits of being a member seem to have gotten lost among the myriads of choices that we can make. No other organization, other than NAIFA, does more to protect and safeguard our career and the benefits that our products and services provide to our clients. I am proud to say that I have been a member for over 40 years. It amazes me when I speak with those in our business today that say that they have never heard of NAIFA.

I still believe that the best way to influence people is through action and conversation. Your action, being a member, speaks volumes. Now, we need to let someone else know. We can no longer afford to have membership be a well-kept secret. Our arms are getting tired of carrying the water bucket of non-members to the fire. Everyone that is a part of this Industry needs to carry his/her fair share, and we need to let them know that. Our strength remains in members, and your Association appreciates your loyalty. Let those that you meet in our Industry, that are not members, know how important it is that they join.

Even though the years ahead will present new challenges, one thing will remain certain: NAIFA will continue to be your voice in how those challenges will be met!

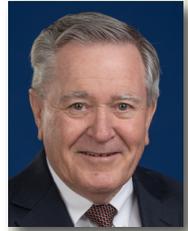
I want to take this opportunity to express my sincere appreciation to all of you for your membership. I especially would like to thank the many volunteers who have given their time freely to serve the needs of this Association. Finally, a special thank you to Patty, and all the State Board Members, for both their friendship and relentless pursuit of excellence. My life has truly been blessed by this Industry and all of you who have been with me along the way.

Wishing you continued success in 2026!

Sincerely,

**David R. Kroll, CLU, ChFC, LUTCF**

*NAIFA-Arizona President 2026*



*President 2026*

## **Association of Insurance & Financial Advisors**

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Website: [www.naifa-az.org](http://www.naifa-az.org), E-mail: [naifa-az@azis.com](mailto:naifa-az@azis.com)

# OFFICERS



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# DIRECTORS



## Government Relations

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Simplicity

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Spence Cassidy Associates

520.760.0077 • jerlynned@scaaz.com



## Membership

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Knights of Columbus

480.549.0833 • jim.lutz@kofc.org



## Membership

**Scott E. Mounger, CLU, ChFC, CASL, RICP, CIF**

OSTB Wealth Strategies

763-248-2661 • scott@ostbwealth.com



*“To accomplish great things,  
we must not only act, but  
also dream; not only plan,  
but also believe.”*

*- Anatole France*

# Leading By Example

---

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

---

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

---

Connie McAdams, LUTCF  
IFAPAC-Arizona Co-Chair



# NAIFA-ARIZONA Past Presidents

*“Knowledge is the treasure, but judgment is the treasurer of the wise.”*

William Penn

1957-1958, 1958-59	Allyn Watkins	1990-91	James G. Shaw, CLU, ChFC
1959-60	Charles A. DeLeeuw	1991-92	Cliff F. Wilson, CLU, ChFC
1960-61	Edwin D. McGwire	1992-93	Jan M. Doughty, CLU, CFP
1961-62	Rulon Rasmussen, CLU	1993-94	Tod D. Lashway, CFP, LUTCF
1962-63	Howard O. Kemper	1994-95	Robert T. Bishopp, CLU
1963-64	Robert E. Pope, Jr., CLU	1995-96	Vinod K. Mohindra, LUTCF, CLU, ChFC
1964-65	Andrew L. Wolf, CLU	1996-97	Robert J. Westbrook, LUTCF, CLU, ChFC
1965-66	Thomas F. Callahan, Jr.	1997-98	Douglas F. Taylor, LUTCF
1966-67	Dilworth C. Brinton, CLU	1998-99	Barry A. McBride, CLU
1967-68	J. Lester Shaffer	1999-00	Myles K. Beck, LUTCF
1968-69	Eugene Taylor	2000-01	Richard J. Thanig, LUTCF
1969-70	Jack E. Bobo, CLU	2001-02	Jim L. Bennett, LUTCF
1970-71	Tony Ziehler, CLU	2002-03	Douglas H. McMurry, LUTCF
1971-72	H. Gordon Farrar, CLU	2003-04	Eugene R. Bentley
1972-73	Earl T. Nagel, CLU	2004-05	Barry A. Cook, CLU, ChFC
1973-74	Robert R. Loftus, CLU	2005-06	Henry C. GrosJean
1974-75	Timothy Ryan	2006-07	Lars D. Hansen, LUTCF
1975-76	Marshall C. Roberts, CLU	2007-08	William B. Cassidy, CLU, ChFC
1976-77	Ray Lincoln, CLU	2008-09	Philip L. Solinsky, LUTCF
1977-78	Peter Zimmer	2009-10	Robert A. Bryant Sr., LUTCF
1978-79	Robert J. Wernecke, CLU	2010-11	David A. Sewell
1979-80	Paul M. Sims, CLU	2011-12	Diana Brettrager, CIC, FSS, LUTCF
1980-81	William J. Adler, CLU	2012-13	David R. Kroll, CLU, ChFC, LUTCF
1981-82	Robert C. Dougherty, CLU	2013-14	Tracy L. Jones
1982-83	Fred E. Chesebrough, CLU	2014-15	Michael A. Sandoval, CLU, ChFC
1983-84	John J. Brooking, CFP	2015-16	D. Michael Ford
1984-85	Dwight Loeffler	2016-17	Seth Krasne, LUTCF, CLTC
1985-86	Verle F. Naber, CLU, ChFC	2017-18	Judy Aguilar-Woertz, ChFC, RICP, LUTCF
1986-87	Michael Eibeck, CLU, ChFC	2018-19	Kenny Ziegler, ChFC
1987-88	Dennis R. Merideth, CLU, ChFC	2019-20	Julie Jakubek, MBA
1988-89	Gary A. Bomar, LUTCF	2021-22-23	Undrea Smith, RICP
1989-90	Marvin D. Loos, CLU	2024-25	Adam Roth

# BUILDING FINANCIAL SECURITY IN ARIZONA



## FINANCIAL SECURITY FOR EVERY STAGE OF LIFE

Life insurers pay out **\$4.6 billion** each year in life insurance and annuity benefits to Arizona families. That's **\$12.6 million every day**.

In Arizona, **1.7 million** individual life insurance policies were in force in 2023, averaging **\$224,000** in death benefit protection.

Here's how our products support employers and their workers and protect residents in Arizona:



- **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

View more ways  
life insurers invest  
in Arizona



## 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 **65,400** jobs
- Invests **\$146 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:



- **456** licensed to do business in Arizona
- **25** domiciled in Arizona

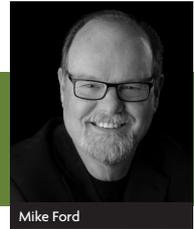
## IMPACT ACROSS AMERICA

Life insurers deliver protection and certainty to middle-income Americans. In fact, the median household income among annuity owners is \$76,000. The life insurance industry:

- Protects **90 million** American families
- Generates **2.8 million** jobs
- Invests **\$8 trillion** in the U.S. economy



# 2025 Government Relations REPORT



The 57th Arizona State Legislature, 1st Regular Session, adjourned at 1:20 P.M. MST on Friday, June 27, 2025, after 166 days. There were 1,724 bills introduced in the session along with 130 memorials and resolutions. 439 of those bills were sent to Governor Katie Hobbs for consideration. She signed 265 into law and vetoed 174.

Governor Hobbs once again broke the single session veto record. She holds the all-time veto record for an Arizona Governor with 390 vetoes in only three legislative sessions.

There were 28 insurance industry related bills that reached the Governor's desk. She signed 24 of the bills into law and vetoed 4 of the bills. Specifics of these bills are available in the 2025 Legislative Session Report from our Lobbyist Daniel Romm. A digital copy of this report is available upon request.

On behalf of Naifa- Arizona a personal letter was sent to all state legislators thanking them for their service and inviting them to contact us with any questions or concerns regarding industry issues. We participated in NAIFA's National State Priorities Survey. Per our lobbyist the top policy priorities in Arizona for 2026 are the following:

1. Managing health plan affordability and rate stability
2. Wildfire/Homeowners Fire Insurance Availability
3. Fraud Prevention – promote targeted fraud prevention that keep premiums lower
4. Prior Authorization/Utilization Review Reform
5. Regulatory Modernization-streamlining product filings

Your Executive team revived the Arizona Builder Fund in 2025. In regulatory and legislative matters, NAIFA-AZ carries weight far more than its size, such leadership must be supported by strong financial backing. The Builder fund is critical to helping us maintain visibility and influence with our legislators. Please consider a contribution to the NAIFA-Arizona Legislative Builder Fund. No amount is too small and will help NAIFA to implement legislation that protects our clients and our businesses.

Thanks once again to our legislative team, Phil Solinsky, Dwight Loeffler and Jim Bennett, as well as our State Board and all the NAIFA volunteers that help to keep your interests top of mind with our legislators.

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 2025 Programs

**JANUARY - 1 hour CE Webinar - Virtual**

**“Safeguarding Against AI Cyber Threats”**

Presenter: Tom Kirkham - Kirkham Iron Tech



**FEBRUARY**

**“Winning With Life and Annuities”**

Presenter: Van Mueller (Virtual Webinar)



**NAIFA - Arizona ‘Capitol Hill Day’**



**“How to Buy & Sell Financial Practices”**

(in Person Workshop)

Presenter: David Wood - Gateway Financial Partners



**MARCH - Virtual Webinar**

**“Unlock Your Tax Strategies and Keep More of Your Money”**

Presenter: Maine Shafer, JD - Bradford Tax Solutions



**APRIL - 2 hours CE - In-Person Program**

**“Innovation & AI (Artificial Intelligence)”**

Presenter: Jeffrey Raskin “Mr. Tech” *(Photo unavailable)*

**“Macro-Economic Estate Planning & The Inheritor’s Dilemma”**

Presenter: Vincent D’Addona, MSFS, CLU, ChFC, CExp, RICP, CEPA, AEP



**JUNE - 1 Hour CE - In-Person Program**

**“Lessons From the Gridiron”**

Presenter: Rich Griffith



**“Deferred Compensation Arrangements”**

Presenter: William B. Cassidy, CLU, ChFC, LUTCF, CLTC



**JULY - 1 Hour CE - In-Person Program**

**“Put Your Dream to the Test”**

Presenter: David R. Kroll, CLU, ChFC, LUTCF



**“Estate Planning & Business Planning”**

Presenter: Daniel Schmaltz, CFP, CKA, BFA, CEPA



OCTOBER - 1 hour CE Credit (in person program)

**"IFAPAC-Arizona Phon-A-Thon"**



NOVEMBER - 1 Hour CE - In-Person Program

**"Tax Law/Planning Updates/OBBA"**

Presenter: Benjamin Lavin



**"Life Insurance Funding Strategies"**

Presenter: Daniel T. Schmaltz, CFP, BFA, CKA, CEPA



DECEMBER - White Elephant Social Event

Sponsored by: MassMutual/Dollarhide





# *In Loving Memory*

*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.*



**William J. Adler, CLU**

NAIFA-Arizona President 1980-81

**Robert A. Bryant, Sr., LUTCF**

NAIFA-Arizona President 2009-2010

**Frank Woertz**

(Husband of Judy Aguilar-Woertz, NAIFA-Arizona President 2017-18)

# 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**

Barker, Michael	Gonzales, Toni	McAdams, Connie
Barteau, Stephen	Goucher, Stephen	McBride, Barry
Brettrager, Diana	Green, Carmen	Naber, Verl
Chesebrough, Patty	Hall, Carrie	Nash, Yara
Coking, William	Hansen, Lars	Patent, Linda
Cook, Barry	Hartman, Robert	Sandoval, Michael
Davis, Jerlynne	Hegna, Thomas	Sewell, David
Deo, Lyle	Jakubek, Julie	Solinsky, Phil
Dzurinko, Andrew	Jones, Tracy	Wilson, Cliff
Eckman, Steven	Kolesar, Charles	Wood, Peter
Fay, Dianne	Kolesar, Stephen	Ziegler, Kenny
Ford, Mike	Lockard, Dorothy	
Frisby, Maria	Loeffler, Dwight	

**Special thanks to those members who answered the Phon-A-Thon Call to contribute, above and beyond, to IFAPAC-Arizona**

Johnson, Noreen  
Lockard, Dorothy  
Loeffler, Dwight  
Sewell, David



# Arizona Legislature - House

Name	District	Party	Email	Room	Phone
Anna Abeytia	24	D	Email: AABEYTIA	Room 121	(602) 926-3501
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 110	(602) 926-3018
Walt Blackman	7	R	Email: WBLACKMAN	Room 224	(602) 926-3244
Seth Blattman	9	D	Email: SBLATTMAN	Room 125	(602) 926-3996
Selina Bliss	1	R	Email: SBLISS	Room 306	(602) 926-4018
Michael Carbone	25	R	Email: MCARBONE	Room 208	(602) 926-4038
-- Majority Leader					
Neal Carter	15	R	Email: NCARTER	Room 204	(602) 926-5761
-- Speaker Pro Tempore					
Pamela Carter	4	R	Email: PCARTER	Room 304	(602) 926-3153
Junelle Caverio	11	D	Email: JCAVERO	Room 325	(602) 926-3285
Joseph Chaplik	3	R	Email: JCHAPLIK	Room 312	(602) 926-3436
Janeen Connolly	8	D	Email: JCONNOLLY	Room 118	(602) 926-3300
Lupe Contreras	22	D	Email: LCONTRERAS	Room 331	(602) 926-5284
Patty Contreras	12	D	Email: PCONTRERAS	Room 126	(602) 926-4057
Quantá Crews	26	D	Email: QCREWS	Room 321	(602) 926-3256
-- Minority Whip					
Oscar De Los Santos	11	D	Email: ODELOSSANTOS	Room 320	(602) 926-4098
-- Minority Leader					
Lupe Diaz	19	R	Email: LDIAZ	Room 302	(602) 926-4852
Lisa Fink	27	R	Email: LFINK	Room 345	(602) 926-3516
Brian Garcia	8	D	Email: BGARCIA	Room 335	(602) 926-3329
John Gillette	30	R	Email: JGILLETTE	Room 130	(602) 926-4100
Matt Gress	4	R	Email: MGRESS	Room 205	(602) 926-4105
Gail Griffin	19	R	Email: GGRIFFIN	Room 225	(602) 926-5895
Nancy Gutierrez	18	D	Email: NGUTIERREZ	Room 330	(602) 926-4134
-- Assistant Minority Leader					
Ralph Heap	10	R	Email: RHEAP	Room 309	(602) 926-3381
Laurin Hendrix	14	R	Email: LHENDRIX	Room 114	(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
Rachel Keshel	17	R	Email: RKESHEL	Room 303	(602) 926-3558
Alexander Kolodin	3	R	Email: AKOLODIN	Room 323	(602) 926-3560
Nick Kupper	25	R	Email: NKUPPER	Room 318	(602) 926-3512
Sarah Liguori	5	D	Email: SLIGUORI	Room 115	(602) 926-3264
David Livingston	28	R	Email: DLIVINGSTON	Room 222	(602) 926-4178
Chris Lopez	16	R	Email: CLOPEZ	Room 310	(602) 926-3445

# Arizona Legislature - House

Name	District	Party	Email	Room	Phone
Elda Luna-Nájera	22	D	Email: ELUNA-NAJERA	Room 332	(602) 926-3881
Aaron Márquez	5	D	Email: AMARQUEZ	Room 123	(602) 926-3179
David Marshall, Sr.	7	R	Email: DMARSHALL	Room 313	(602) 926-3579
Teresa Martinez	16	R	Email: TMARTINEZ	Room 129	(602) 926-3158
Christopher Mathis	18	D	Email: CMATHIS	Room 337	(602) 926-3138
Steve Montenegro	29	R	Email: SMONTENEGRO	Room 223	(602) 926-3635
-- Speaker					
Quang H Nguyen	1	R	Email: QNGUYEN	Room 226	(602) 926-3258
Justin Olson	10	R	Email: JOLSON	Room 113	(602) 926-3376
Michele Peña	23	R	Email: MPENA	Room 341	(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
Khyl Powell	14	R	Email: KPOWELL	Room 342	(602) 926-3415
Tony Rivero	27	R	Email: TRIVERO	Room 112	(602) 926-3528
Mariana Sandoval	23	D	Email: MSANDOVAL	Room 326	(602) 926-3740
Stephanie Simacek	2	D	Email: SSIMACEK	Room 120	(602) 926-3083
Stephanie Stahl Hamilton	21	D	Email: SSTAHLHAMILTON	Room 333	(602) 926-3279
James Taylor	29	R	Email: JTAYLOR	Room 344	(602) 926-3564
Stacey Travers	12	D	Email: STRAVERS	Room 322	(602) 926-3917
-- Minority Whip					
Myron Tsosie	6	D	Email: MTSOSIE	Room 339	(602) 926-3157
Betty J Villegas	20	D	Email: BVILLEGAS	Room 324	(602) 926-3027
Kevin Volk	17	D	Email: KVOLK	Room 119	(602) 926-3498
Michael Way	15	R	Email: MWAY	Room 308	(602) 926-3433



# Arizona Legislature - Senate

Name	District	Party	Email	Room	Phone
Lela Alston -- Minority Caucus Chair	5	D	Email: LALSTON	Room 315	(602) 926-5829
Hildy Angius	30	R	Email: HANGIUS	Room 302	(602) 926-5051
Shawwna Bolick	2	R	Email: SBOLICK	Room 307	(602) 926-3314
Flavio Bravo	26	D	Email: FBRAVO	Room 313	(602) 926-4033
Eva Burch	9	D	Resigned 03/14/2025		
Frank Carroll -- Majority Whip	28	R	Email: FCARROLL	Room 212	(602) 926-3249
Eva Diaz	22	D	Email: EVA.DIAZ	Room 313	(602) 926-3473
Timothy "Tim" Dunn	25	R	Email: TDUNN	Room 310	(602) 926-4139
Denise "Mitzi" Epstein	12	D	Email: MEPSTEIN	Room 315	(602) 926-4870
David C. Farnsworth	10	R	Email: DFARNSWORTH	Room 200	(602) 926-3387
Brian Fernandez	23	D	Email: BFERNANDEZ	Room 312	(602) 926-3098
Mark Finchem	1	R	Email: MFINCHEM	Room 304	(602) 926-3631
Rosanna Gabaldón -- Minority Whip	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
Jake Hoffman	15	R	Email: JAKE.HOFFMAN	Room 306	(602) 926-3292
John Kavanagh -- Majority Leader	3	R	Email: JKAVANAGH	Room 212	(602) 926-5170
Lauren Kuby	8	D	Email: LKUBY	Room 311	(602) 926-4124
Venden "Vince" Leach	17	R	Email: VLEACH	Room 303	(602) 926-3694
J.D. Mesnard	13	R	Email: JMESNARD	Room 309	(602) 926-4481
Catherine Miranda -- Assistant Minority Leader	11	D	Email: CMIRANDA	Room 213	(602) 926-3413
Analise Ortiz	24	D	Email: ANALISE.ORTIZ	Room 308	(602) 926-3633
Kevin Payne	27	R	Email: KPAYNE	Room 302	(602) 926-4854
Warren Petersen -- President	14	R	Email: WPETERSEN	Room 205	(602) 926-4136
Wendy Rogers	7	R	Email: WROGERS	Room 304	(602) 926-3042
Kiana Sears	9	D	Email: KSEARS	Room 314	(602) 926-3374
Janae Shamp	29	R	Email: JSHAMP	Room 303	(602) 926-3499
Thomas "T.J." Shope -- President Pro Tempore	16	R	Email: TSHOPE	Room 212	(602) 926-3012
Priya Sundareshan -- Minority Leader	18	D	Email: PSUNDARESHAN	Room 213	(602) 926-3437
Carine Werner	4	R	Email: CWERNER	Room 301	(602) 926-3673

# Member Recognition



# Advisor of the Year

— HALL OF FAME MEMBERS —

*\*Deceased*

1979	*Don A. Seeds, CLU	2006	*Douglas F. Taylor, LUTCF
1980	*Tony Ziehler, CLU	2007	Barry A. Cook, CLU, ChFC
1981	*Dilworth C. Brinton, CLU	2008	Jim L. Bennett, LUTCF
1982	*Andy Wolf, CLU	2009	Barry A. McBride, CLU, AEP
1983	Marshall C. Roberts, CLU	2010	Harry E. Markham, LUTCF, CSA
1984	*John Van Houten, CLU	2011	Philip L. Solinsky, LUTCF
1985	*Howard O. Kemper	2012	Lars D. Hansen, LUTCF
1986	*Allyn Watkins	2013	unavailable
1987	Robert J. Wernecke, CLU	2014	Thomas D. Hegna, CLU, ChFC, CASL
1988	John J. Brooking, CFP	2015	Andrew G. Dzurinko, CLU, ChFC
1989	*Paul M. Sims, CLU	2016	Diana Brettrager, CIC, FSS, LUTCF
1990	Verle F. Naber, CLU, ChFC	2017	Tracy L. Jones
1991	*Joe Ledgerwood	2018	unavailable
1992	Michael E. Eibeck, CLU, ChFC	2019	David R. Kroll, CLU, ChFC, LUTCF
1993	Robert C. Dougherty, CLU	2020	unavailable
1994	*Dennis R. Merideth, CLU, ChFC	2021	D. Michael Ford
1995	*Marvin D. Loos, CLU	2022	Michael A. Sandoval, CLU, ChFC
1996	*Jack E. Bobo, CLU, FLMI	2023	Kenny Ziegler, ChFC, LUTCF
1997	Seymour Petrovsky, CLU	2024	Julie Jakubek, MBA
1998	Tod D. Lashway, CFP, LUTCF	2025	Seth J. Krasne, LUTCF, CLTC
1999	*Robert T. Bishopp, CLU		
2000	Cliff F. Wilson, CLU, ChFC		
2001	Dwight Loeffler		
2002	*Jack W. Watson, LUTCF		
2003	James G. Shaw, CLU, ChFC		
2004	Myles Beck, LUTCF		
2005	*Douglas H. McMurry, LUTCF		

# Advisor of the Year 2025



**Seth J. Krasne**

I'm truly honored to receive the NAIFA-Arizona Advisor of the Year Award this year. I've been in the insurance and financial services business for nearly 25 years, and joining NAIFA early in my career was one of the best decisions I ever made. It not only encouraged me to get involved, but also to give back — I've had the privilege of serving as both local and state president in the past. I have also served as the political involvement leader for the New York Life's Tucson General Office. This coincided with my time in NAIFA, and sent me to both the Capital in Washington, DC, and the State Capitol in Phoenix, AZ several times on behalf of my clients, and our industry. I have truly enjoyed my career with New York Life where I have achieved Council Membership for many years, and Senior NYLIC status, to name a couple. Council is an annual company recognition program based on agent production and Senior NYLIC is awarded to agents who have represented New York Life for twenty years.

Together, New York Life and NAIFA have shaped me as a Financial Professional and, more importantly, connected me with incredible colleagues and lifelong friends. Over the years, I've learned that success in this business comes from integrity and showing up — not just for your clients, but for your community, your peers, and, of course, your family.

Seth enjoys spending time with his family, who include: his lovely wife Leslie, daughters Lacie and Jalissa, and son Calvin. Seth and Leslie travel each year golfing at their favorite bucket-list courses.

NAIFA-Arizona pays tribute to Seth J. Krasne, as a Member of its 'Hall of Fame' in recognition of his contribution to the insurance industry, the community and this Association.

# 2025 Recipient of the Richard J. Martinez, CLU Community Service Award

## William Cassidy

Bill Cassidy grew up in Aurora, Illinois, and attended the University of Illinois before moving to Arizona in 1979, where he graduated from Arizona State University. After college, he began his career in Southern California but returned to Arizona in 1988 to enter the financial services profession with New England Life. In 1995, he became a General Agent and later founded **Spence, Cassidy & Associates, LLC**, a Scottsdale-based insurance and investment advisory firm dedicated to helping families and business owners make informed financial decisions.

Bill joined NAIFA in 1989 and has served in multiple leadership roles, including **President of NAIFA–Phoenix (1999–2000) and President of NAIFA–Arizona (2007–2008)**. He holds the CLU, ChFC, LUTCF, CLTC, and CEPA professional designations and is widely regarded for his mentorship and dedication to the profession.

He has always been deeply charitable and community minded. He served on the **John C. Lincoln Foundation Board**, and has long supported **Phoenix Children’s Hospital, St. Mary’s Food Bank**, and numerous other local causes. His passion for



helping children took root when he became involved with the **Thomas J. Pappas School for Homeless Children**. After learning that many students were missing school simply because they lacked transportation, Bill made a bold promise: any child who achieved an 80% attendance rate would receive a bicycle.

Although nearly 200 students were eligible, Bill moved forward in faith—determined to keep his word. Through a partnership with **Landis Cyclery** and the generosity of bike manufacturers, every qualified child received a new bicycle. He fondly remembers when the bikes came, they were in boxes and needed to be assembled. He and friends spent most of a week getting them ready!

## William Cassidy

He also supported **Canyon State Academy**, run by the **Rite of Passage Organization**, through his friend and fellow NAIFA member **Barry McBride**. When Bill was relocating his office, he found himself with a large amount of quality office furniture that was being replaced. After learning from Barry that the Academy had just completed a new administrative building but lacked furnishings, Bill donated over **6,000 square feet of office furniture**, including desks, chairs, conference tables, and an entire phone system—outfitting the entire facility at no cost to the school.

Today, he serves on the **Board of Directors for Junior Achievement of Arizona**, where he continues to champion financial literacy and workforce readiness for children ages

6 to 18. As Bill often says, “There are 1.2 million kids in Arizona—and last year, we reached 177,000 through JA programs. We are only scratching the surface, and there’s still so much more work to do.”

Bill has a sign in his office that reads:

*“A hundred years from now... it will not matter what my bank account was, the sort of house I lived in, or the kind of car I drove... but the world may be different because I was important in the life of a child.”*

Bill lives a purposeful life based on that ideal.

Bill’s dedication to community service, mentorship, and the betterment of children’s lives exemplifies the spirit of the **Richard A. Martinez Community Service Award**.



Spotlighting the People of Arizona

## Board Member Julie Jakubek

Sharing the stories of students, educators, and community leaders who inspire and empower Arizona's future.

### Honoring Julie Jakubek: A Legacy of Leadership and Service in Financial Education



We are incredibly grateful for Julie Jakubek's unwavering dedication and service to the Arizona Council on Economic Education. Since 2010, Julie has been a driving force in promoting financial literacy among Arizona students. As she wraps up her tenure as Board Chair, we reflect on her many contributions – educating students on the financial impact of insurance, serving as a judge, recruiting volunteers, securing funding, and leading program initiatives.

Julie's passion for community service extends beyond ACEE, and it is no surprise that she was recently honored as Business Woman of the Year by Women of Scottsdale and Advisor of the Year for the National Association of Insurance and Financial Advisors of Arizona. Yet, her greatest reward is being a role model for her high school children, showing them the power of leadership, service, and dedication.

Julie, thank you for your commitment to financial education and for making a lasting impact on students, volunteers, and the community. Your leadership and passion will continue to inspire us all!



MEMBER SPOTLIGHT:

# Ashley K. Butler

*on Passion, Purpose,  
and Growth*

New NAIFA Member 2024



Ashley K. Butler, a proud resident of Gilbert, Arizona, and a dedicated member of Alpha Omega Wealth, is a new NAIFA member as of 2024. Though relatively new to the organization, Ashley's passion for the financial services industry runs deep, with roots stretching back to 2014 when a college friend introduced her to the field. From the beginning, it was clear to her that this career path held something truly meaningful—the ability to make a tangible difference in people's lives.

For Ashley, the mission behind her work is what drives her each day. Inspired by her agency president's philosophy that wealth enables individuals to do more good in the world, she sees her role as pivotal in helping both individuals and businesses unlock that potential. Her commitment is especially clear in her chosen area of specialization: the Infinite Banking Concept. Looking ahead, she hopes to serve churches and nonprofit organizations that support children in need, along with the caretakers who provide for them.

Ashley's journey with NAIFA began thanks to her president's strong encouragement—what she jokingly refers to as a “mandate.” But beyond the recommendation, Ashley quickly saw the value NAIFA brings to the table. From the community it fosters to its strong political advocacy, NAIFA has already become a cornerstone of her professional growth. According to Ashley, NAIFA's advocacy work is essential—not just for the protection and success of advisors like her, but for the clients they serve. She's especially mindful of how proposed changes at the federal level, such as those targeting the tax advantages of permanent life insurance, could directly impact her ability to help clients build wealth using cash value policies.

Though she's still early in her advocacy journey, Ashley has earned her Financial Security Advocacy Badge and is eager to dive deeper into NAIFA-Arizona's efforts. She sees political involvement not only as a duty but also as a vital way to preserve the integrity of the profession and ensure that consumers continue to have access to life-changing financial strategies.

For Ashley, NAIFA is more than an association—it's a source of encouragement, empowerment, and education. It's helped her feel less alone in a complex industry and has provided opportunities for personal and professional development that have already made a big difference. She proudly wears her NAIFA pin as a symbol of belonging and commitment to her clients and community.

When asked why she would recommend this career to others, Ashley doesn't hesitate. While she acknowledges the challenges, she emphasizes how deeply rewarding the work is. The ability to affect someone's life, legacy, and future with thoughtful financial planning is an unmatched privilege. Her own experiences, both personal and professional, have cemented her belief that this career is a calling—one that requires heart, integrity, and the desire to serve. And for those looking to grow, connect, and lead in this evolving industry, she firmly believes there's no better partner than NAIFA.

# sentinel program

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

## NAIFA-AZ Says “Thank You” to its Sentinel 2025 Members

### Platinum Sentinel Member

Stephen Groucher  
Bekki Harper  
Julie Jakubek  
Barry McBride

---

### Premiere Sentinel Member

Seth Krasne  
David Kroll  
Kenny Ziegler

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### Elite Sentinel Member

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Connie McAdams

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# NAIFA Quality Awards

## 2025 Industry Award Winners



### *Advisors Committed to Client Care*

The NAIFA Quality Award provides advisors at any career stage the opportunity to demonstrate a commitment to excellence. Advisors specializing in Life & Annuities, Financial Advising & Investments, Health & Employee Benefits, Multiline Sales, or any combination of these specialties have the opportunity to demonstrate the quality that is the mark of a true professional.

In 2025, NAIFA introduced an Emeritus category. You must be 60 years of age or older and have previously qualified for NQA for a minimum of 15 years to qualify for this category.

### **MULTILINE**

Scott Bennett, CLF, LUTCF

Christopher P. Gurton, LUTCF, ChFC

Heather Guzman, ChFC, LUTCF

Scott Nasca, LUTCF

Mark M. Pinter

Teresa Robinson



### **FINANCIAL ADVISING & INVESTMENTS**

Scott F. Bennett, CLF, LUTCF

Scott Nasca, LUTCF

Teresa Robinson

### **LIFE INSURANCE & ANNUITIES/EMERITUS**

Lyle A. Deo, CLU, ChFC, CLTC



*NAIFA-Arizona wishes to thank, and congratulate, those members who responded to an appeal identifying as a member of the Million Dollar Round Table:*

**Supriya Bakshi** – Life and Qualifying

**Dilworth C. Brinton, Jr., CLU, ChFC** – Life Member

**Wendy Feldman, CLU, ChFC, CASL, CLTC** –  
Life and Qualifying, Court of the Table

**Stephen Goucher** – MDRT Member

**Barry A. McBride, CLU, AEP** – Life and Qualifying, Top of the Table

**Shawna Moore, RICP, FSCP, LUTCF** – Top of the Table

**Scott A. Nasca, LUTCF** – MDRT Member

**John Rippinger** – Life Member

**Amber Stitt, ChFC, CLTC** – MDRT Member

**Gerry A. Wiebers, LACP** – Life Member, Top of the Table



# 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):**

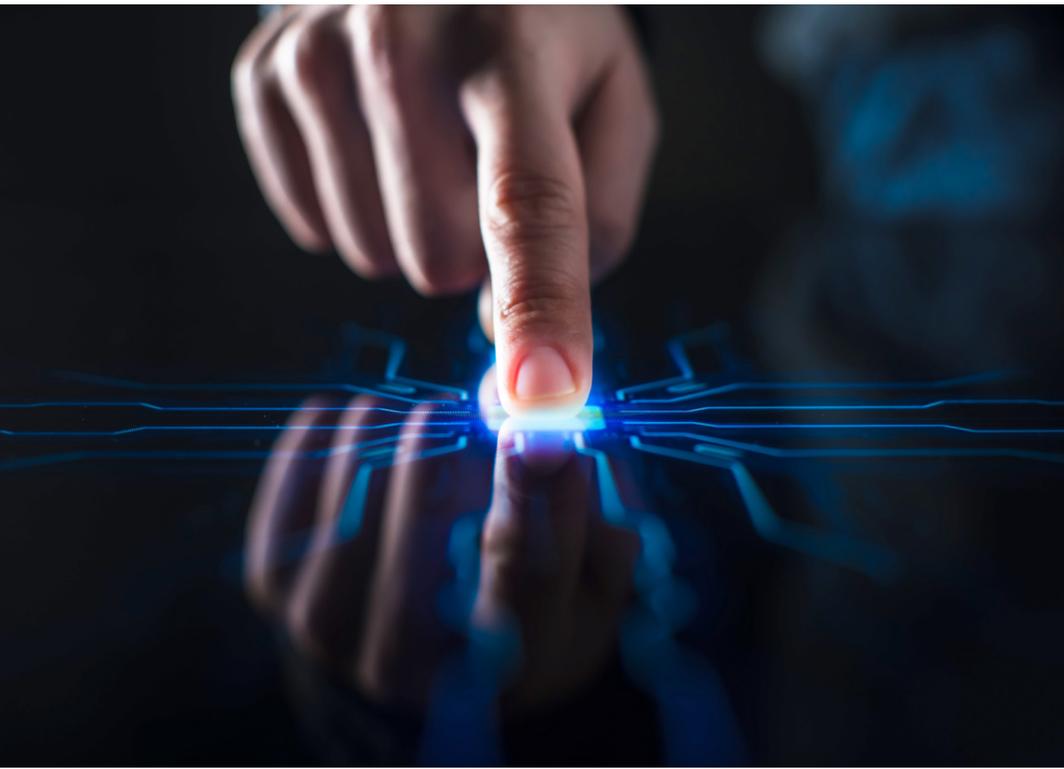
Provides support for professional career development, educational and other benefit programs.

## **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.

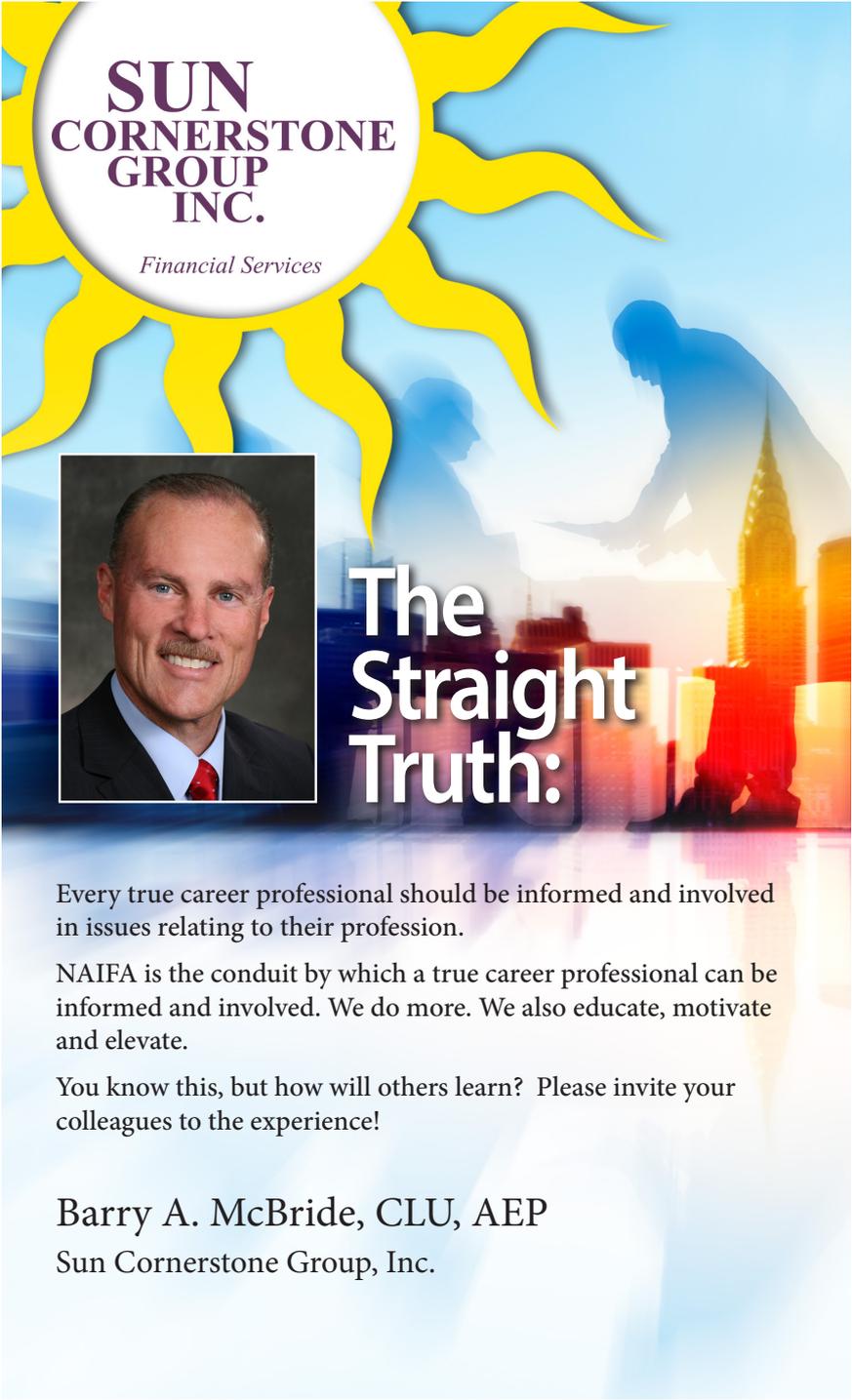


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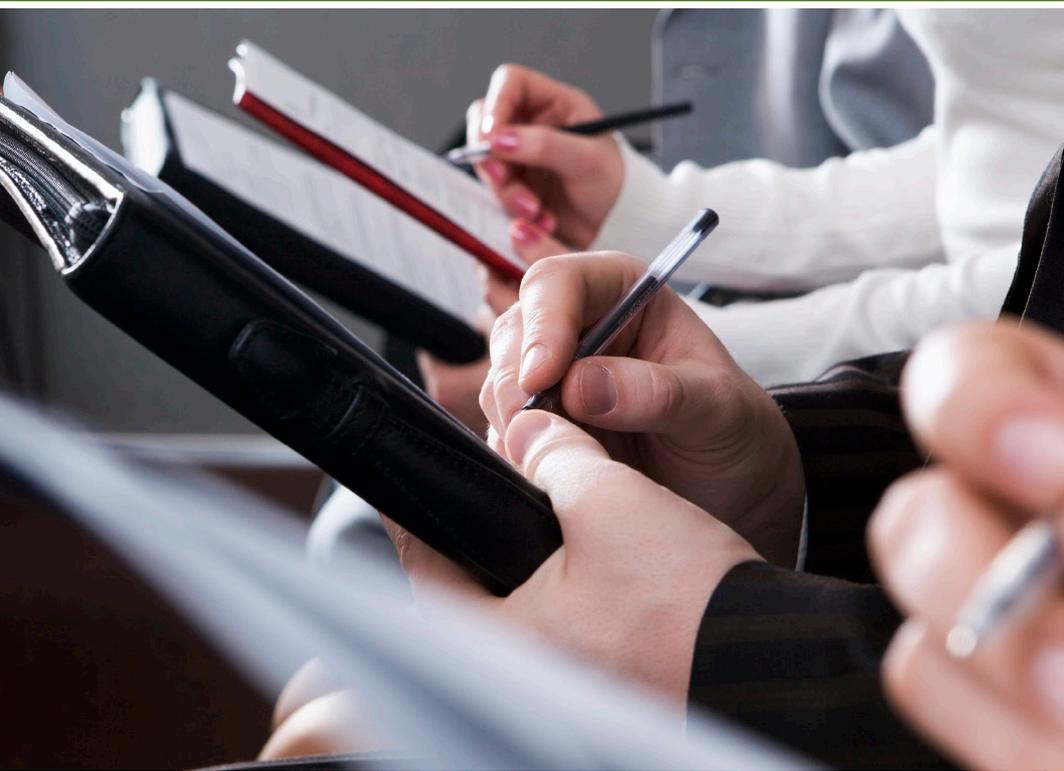


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Kawar, Tina

# Company Member Roster

## **LFA/Sagemark**

Shaw, Richard G.

## **LTCR Pacific Agency**

Veta, Michail L.

## **M.A.S. Group**

Rosalez, Donald

## **MassMutual**

Danzy, Jabari  
Despres, Shana  
Dollarhide, Jeffrey C.  
Goldman, Johnathan D.  
Goldman, Victor  
Janower, Todd  
Kroll, David R.  
Kuraja, Sue  
Rowland, Tom  
Scheid, Joe W.  
Thomas, Michael J.

## **Modern Woodmen**

Ceschin, Daniel A.

## **Montoya Group**

Green, Carmen T.

## **Mutual of Omaha Companies**

McAdams, Connie  
Sandoval, Michael

## **National Life Insurance Company**

Stilb, Timothy J.

## **New York Life**

Argabright, Jennifer  
Bakshi, Supriya  
Bearden, David V.  
Ben-Dov, Ronen  
Braden, Marc S.  
Brinton Jr., Dilworth  
Carreon, Marcus  
Chan, Peter  
Cook, Barry A.  
De La RamBelje, Peter  
Famous Douglas  
Feldman, Wendy L.

Fort, Richard  
Frank, Bruce J.  
Hall, Carrie  
Hartman, Robert A.  
Iniguez, Vincent  
Kidder, Stephanie R.  
Krasne, Seth J.  
Lai-Chan, Yuk-Yi Susan  
Loeffler, Dwight E.  
Mindak, Steven T.  
Nash, Yara T.  
Nemger, Michael A.  
Pfeiffer, Geoff  
Porro, Drew Lucien  
Ramazanoglu, Kuddusi D.  
Smith, Gordon M.  
Tucker, Charles A.  
Velez, Maria  
Vest III, Robert L.  
Wise, Pamela

## **Nexus Wealth Management**

Isaacs, Craig A.

## **Northwestern Mutual**

Kosnick, Jordan T.  
Modjeski, Clarence  
Morris, Joseph A.

## **Ohio National**

Gonzales, Toni L.

## **OSTB Wealth Strategies**

Mounger, Scott

## **Phocus FSG**

Janson, Clayton M.

## **Physicians Mutual Insurance**

Johnson, Timothy  
Smith, Michael P.

## **Power Women Investing**

Ronstadt, Tiana

## **Principal Financial Group**

Vetrano, Thomas R.

## **Prominent Peak Wealth Management**

Lopez, Liz

**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.

**Spence, Cassidy & Associates, LLC**

Cassidy, William B.  
Clements, Daniel F.  
Davis, Jerlynn  
Kolesar, Charles R.  
Kolesar, Stephen M.

**State Farm**

Aquilar-Woertz, Judy  
Buchmann, Richard  
Cunningham, Kevin  
DeBerry, Tom  
Ford, Vandy  
Gaboury, Brett S.  
Hagberg, Donald  
Hess, Mark  
Johnson, Steven M.  
Lang, John W.  
Lane, Lance  
Lucero, Cami  
McDermid, Aaron  
Nelson, Deana M.  
Nuetzi, Cathy  
Shkapich, Dan  
Swanson, Dondrell  
Tatro, Tom

**Summit Financial Solutions**

James, Steve A.

**Sun Cornerstone Group**

McBride, Barry A.  
Moore, Lydia

**Thrivent Financial for Lutherans**

Brooks, Brian W.  
Kolzow, Jeffrey C.



NAIFA-Arizona wishes to  
*Welcome* its 2025 New and  
Returning Members.

Kristi Bell – Ash Brokerage

Arom Burgueno – Knight of Columbus

Isaiah Castellaw – Horace Mann

Drake Collins – Independent

Shana Despres – MassMutual

Ian Garcia – Independent

Daniel Gombrich – Independent

Catina Hoffman – Independent

Steve James – Summit Financial Solutions

Jennifer Jersey – Independent

Laura Klebosky – Independent

Wade Lashley – Independent

Liz Lopez – Prominent Peak

Miguel Lopez – Horace Mann

Robert Mars – Horace Mann

Trent Mortenson – Horace Mann

Robert Ryan - RP Ryan Insurance

Don Shelley – Horace Mann

Kevin Soria – Colonial Life

Michael Veta – LTCR Pacific Agency

Kevin Weber – American Senior Benefits

The Spirit of the Association

# Who's Who in photos





## DESERT LILY ACADEMY

# CERTIFIED NURSING PROGRAM

### AT A GLANCE

Canyon State Academy is launching a Certified Nursing Assistant (CNA) Program designed for our female students, 80% of whom are survivors of human trafficking and chronic trauma. This trauma-informed, industry-recognized training pathway will provide classroom learning, hands-on clinical practice, and externships with local healthcare providers—equipping young women with the skills, confidence, and certification needed to enter Arizona’s high-demand healthcare workforce.



### IMPACT

- **Immediate Employment:** Students positioned for work in hospitals, long-term care facilities, and healthcare settings across Arizona.
- **Breaking Cycles:** Equips vulnerable youth with tools, confidence, and hope for a meaningful future.
- **Long-Term Vision:** Establish a continuum of healthcare career training to build lasting stability.
- **Community Benefit:** Addresses Arizona’s high demand for healthcare workers while uplifting resilient young women.
- **Generational Change:** Graduates who achieve stability are more likely to support healthy families and contribute positively to their communities.

### DEMOGRAPHIC CHALLENGES

- Many of our students lack family support systems, professional role models, and job readiness skills.
- Survivors of trauma often face barriers to education, employment, and stability.
- Without access to vocational training, young women risk falling back into cycles of exploitation and poverty.
- Limited exposure to career pathways prevents long term independence.

### SCHOOL CHALLENGES

To launch the CNA Program, we are seeking support to complete and equip our training space.

#### Key needs include:

- 2 HVAC wall units, interior/exterior rehab: *\$35,000*
- Medical training equipment & furnishings: *\$15,000* (hospital beds, vital sign monitors and lab furniture).
- Classroom technology to support instruction and certification preparation: *\$14,000*
- Supplies & consumables: scrubs, gloves, and additional medical accessories: *\$5,000 annually*

These targeted investments will transform our modular home into a fully functional mock clinical training site, making certification and hands-on learning possible for our students.

### SOLUTIONS

- Provide a CNA Program that includes:
- Classroom instruction
- Hands-on skills labs in the mock clinical space
- Clinical externships with local healthcare providers
- Curriculum covers patient care, infection control, medical ethics, communication, professionalism, empathy, and leadership.
- Students will graduate eligible to sit for Arizona State Board of Nursing CNA licensure.



# GLOBAL ACTION

## EQUIP A PASTOR, TRANSFORM A COMMUNITY.

### THE PROBLEM:

**90%**

**of the world's pastors have never had access to any kind of biblical training.**

### OUR MISSION:

**We are dedicated to equipping pastors and ministry leaders in hard places to transform their communities with the gospel.**

We accomplish this by training local leaders around the world to understand, teach, and live out the gospel within their own cultural contexts. Using our proven curriculum and experienced local faculty members, we work directly in the challenging places of the world.

### THE RESULT:

**Pastors and ministry leaders are unleashed to teach the true gospel, reach the unreached, make disciples, plant and lead healthy churches, serve the poor, and transform their communities.**



### CONTACT US:

Rich Griffith  
(719) 491-1537 (cell)  
rgriffith@globalaction.com  
Phoenix, AZ

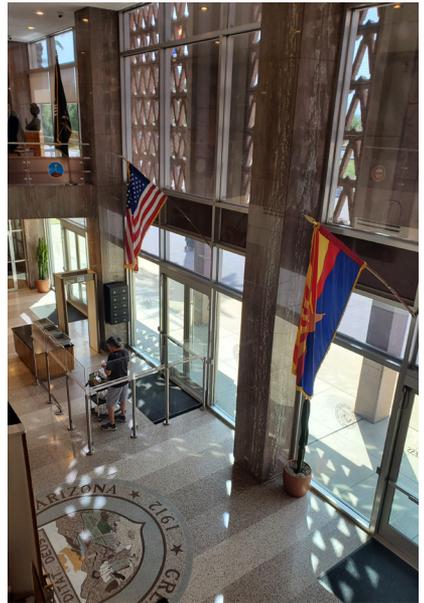
For more information, visit  
[www.globalaction.com](http://www.globalaction.com).

Sponsored by Barry McBride, CLU, AEP

Community Outreach *continued*



# Capitol Hill





# Political Engagement



# Leadership Involvement





# Leadership Involvement *continued*





# Membership Involvement





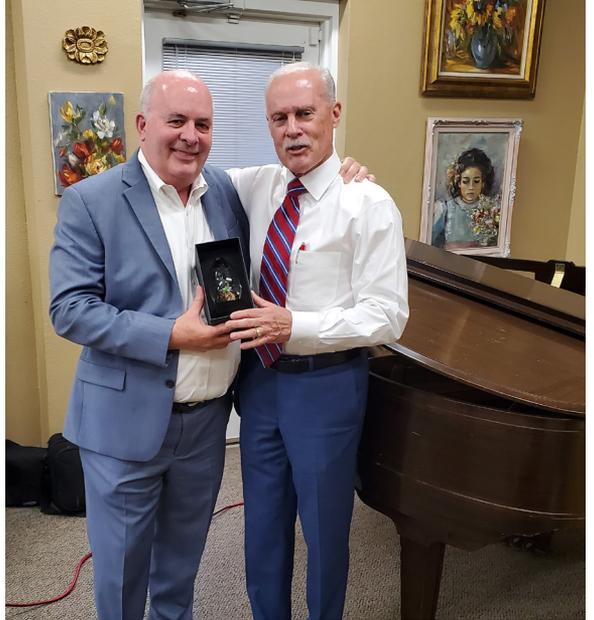
# Membership Involvement *continued*





# Programs Participation





# Programs Participation *continued*





# Programs Participation *continued*





# Programs Participation *continued*



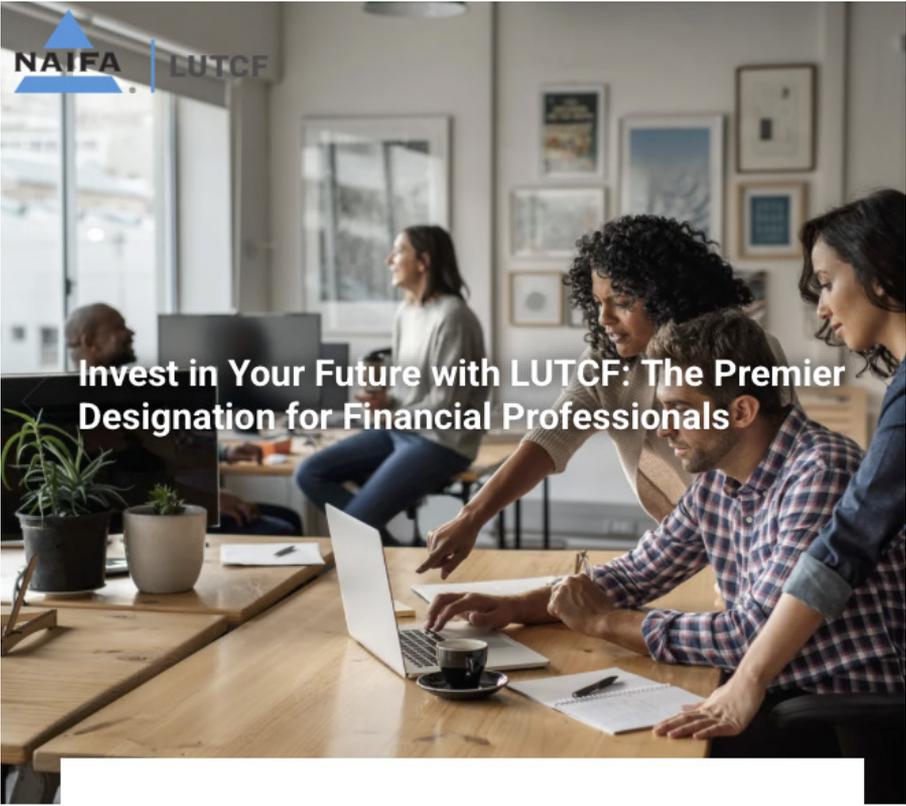


# Programs Participation *continued*





# Member Benefits



Invest in Your Future with LUTCF: The Premier Designation for Financial Professionals

## Life Underwriter Training Council Fellow

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- Best For:** Financial advisors seeking to hone critical skills in prospecting, selling, business planning, and product knowledge
- Commitment:** 12 months
- Format:** Virtual Learning
- Tuition:** For NAIFA members, starting at \$350 per course with 3-course package available for \$900. Non-member tuition is \$450 per course and \$1,000 for the 3-course package. The additional \$100 is applied as first-year NAIFA membership dues

# Explore the NAIFA Marketplace.

We've done the heavy lifting for you.  
Gain exclusive access to best-of-need products and services.

## AFFINITY PROGRAMS

### Affinity Partners Bring You Savings

Through NAIFA's Affinity Partner Program, NAIFA members are eligible for a variety of member discounts. NAIFA selectively partners with companies to provide financial advisors and insurance agents access to discounts on products and services to enhance their business and promote top line growth.



#### AFFINITY PARTNERS

**NAIFA's Group Insurance Plans:** These group plans provide members the ability to access a suite of insurance plans to fit your needs including Short-Term and Long-Term Disability, E&O, Business Overhead Expense, Cybersecurity, Health Care, Term Life and AD&D, Dental, Vision, and Auto & Home. [Click Here to learn more](#)



**InsurTech Express:** InsurTech Express is the principal resource that brings the Life Insurance and Annuity community together in one easy-to-access, secure online location for information on Insurance Technology. Check out InsurTech's white papers, industry trends, media, education, solution platforms, and more. [Click here](#)



**RSSA®:** RSSA® is a structured, turn-key Social Security education, technology, marketing, and support program to help your organization build a deeper, holistic analysis of every facet of a client's financial plan. Earn your certificate as a Registered Social Security Analyst®, you will become an expert in identifying retirement needs early on for clients. [Learn more](#)



**SAMUSA:** SAMUSA helps Advisors/ Agents 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. NAIFA members receive a 10% discount on all planners and a copy of "The Common Denominator of Success." Check out SAMUSA's suite of planning tools today. [Learn more](#)



**TASC:** We are blazing new trails with a one-of-a-kind, industry first, instantly configurable benefits cloud platform known as TASC Universal Benefit Account® which is designed around how people think, rather than overcomplicated rules and regulations. Learn more about key benefits of the Universal Benefit Account for your clients. [Click here](#)



MENTOR  
LOOP

## Together We Grow!

According to National Mentoring Day, which is celebrated on October 27th each year, 97% of those who have a mentor find the relationship to be immensely valuable, and entrepreneurs are twice as likely to succeed if they have a mentor.

That is why we launched the NAIFA Mentor Loop in 2023, our exclusive member benefit that matches mentors and mentees while providing a structured and supportive framework.

In the initial roll-out phase, 25 pairs of mentors and mentees were matched, utilizing a carefully curated set of criteria to ensure their success. After a successful launch, we have now expanded the program and are seeking new pairs!

While anyone in NAIFA is eligible, mentors should have at least 10-15 years of experience in the industry, while preference will be given to mentees who are the newest to the business. Best of all, there is no additional cost to this NAIFA member benefit.

Once you have completed the sign-up form through our Mentorloop system, our team will work to match mentors and mentees and keep you apprised of our progress. As we have a limited number of seats available and need to have sufficient mentors and mentees available, it is possible that not everyone desiring to be matched will be. By signing up to be a mentor or mentee, you are agreeing to abide by the terms of our NAIFA Mentor Loop User Agreement. However, we pledge to do our very best to find mentors/mentees for all of those interested as the program continues to expand.

NAMED AS A TOP 10 PUBLICATION FOR FINANCIAL ADVISORS BY **smartasset**



## Get NAIFA's Advisor Today in Your Inbox

80,000 People Currently Subscribe to Advisor Today to Find Out Who's Doing What and What Keeps Advisors Motivated.

The Advisor Today platform is a rich source of entertaining stories and practical information featuring NAIFA members. Learn how the best insurance and financial advisors have achieved success, what inspires and motivates them, and what they've done to take their careers and practices to a higher level.

Read articles written by NAIFA members who provide insights into their areas of expertise within the insurance and financial services business, from sales tips and techniques to practice management strategies, and from client service ideas to explorations into ethical service.

Advisor Today is the platform where you can learn from and about the best insurance and financial professionals in the business. Our most popular articles include:

- Member Spotlights
- Firm and Agency Profiles
- Member-to-Member Tips and Best Practices
- Highlights of NAIFA Member Achievements

The Advisor Today brand also includes a podcast and webinar series. As a blog subscriber, you'll stay informed of all of the content AT provides its subscribers. We're dropping a new podcast nearly every week. Plus you can listen on your favorite podcast platform.

Sign up today to receive a weekly email featuring the top Advisor Today stories. And if you are a NAIFA member who would like to contribute to Advisor Today, we would love to hear from you.



# LEADERSHIP IN LIFE INSTITUTE

## Developing Top Leaders for More than 20 years

The Leadership in Life Institute (LILI) is a six-month leadership development program devoted to advancing your personal growth and professional success.

Online LILI Classes Now Forming!

Experience LILI Your Way! NAIFA has launched Online LILI. You'll receive the same curriculum but with the flexibility to participate virtually. Classes will form each month, allowing you to choose when the timing is right.

### Mission

The NAIFA Leadership in Life Institute (LILI) develops leaders by fostering personal growth, enhancing business practices and developing skills necessary for effective leadership.

The course offers:

- The best in leadership and personal-development thinking
- Tools to improve your practice and create a business plan
- Increased understanding of self and improved interpersonal relationships
- Expanded professional network and opportunities for growth through LILI alumni programs
- Leadership opportunities in NAIFA
- The One Page Business Plan® by Jim Horan
- The Kolb Learning Style Inventory
- Emotional Intelligence (EQ) - the #1 predictor of success in business and leadership. Learn what your EQ is and how to increase it.
- Credibility by James Kouzes and Barry Posner - all new and revised edition with sharpened focus on how leaders earn and sustain credibility
- Study of Jim Collins' entire body of work on Good to Great companies, what drove some to fail, and others to thrive in uncertain times

Taking the course is an investment in oneself and the returns on the investment can be infinite. Graduates consistently report that LILI gives them the tools to succeed and 70% report a measurable increase in the growth of their business since graduating.

*The LILI program is only available for NAIFA members.*



## The Certified Long Term Care Designation

Offered through our partnership with special pricing for NAIFA members.

CLTC is one of the founding sponsors of our **Limited & Extended Care Planning Center** (LECP). Our partnership allows NAIFA members to study for and sit for the CLTC designation at a preferred price. Additionally, the CLTC pairs wonderfully with the LACP to create an advisor who is the most well-versed on how to best fund long term care needs balanced with retirement and personal goals.

If you're a member, visit the member event calendar to get your discount codes. If you are not a member, **consider joining NAIFA.**



# LIMRA and Hoopis Performance Network (HPN) Recognized for Fifth Consecutive Year on Selling Power’s 2025 Excellence in Sales Training List



**WINDSOR, Conn. and CHICAGO, May 19, 2025**—LIMRA and Hoopis Performance Network (HPN) proudly announce their fifth consecutive recognition from Selling Power as a top sales training provider for their collaboration, Trustworthy Selling. This honor highlights their commitment to delivering innovative training programs that drive sales success in the financial services industry.

Selling Power is a leading digital magazine for sales leaders, providing strategies and insights to maximize sales performance. The 2025 award program rates companies on the depth and breadth of their sales training programs offered, innovative offerings, client satisfaction and overall contributions to the sales training market.

“Trustworthy Selling has a proven record of success. Upon completing the program, financial professionals, on average, report a 46% increase in first-year commissions, a 25% increase in new clients, and premium growth of 32%,” said Kim Terranella, vice president, Industry Solutions, LIMRA and LOMA. “As we continue to support our members’ distribution development goals through this program, we are pleased that Selling Power continues to recognize the unique value this program provides to financial professionals.”

“We’re honored to receive this recognition from Selling Power for the 5th year in a row – especially since we’re the only sales effectiveness program among the honorees designed exclusively for the financial services industry,” said Joey Davenport, HPN president. “Equipping financial professionals to provide financial security worldwide has always been the mission of the Trustworthy Selling team.”

Trustworthy Selling offers a wide range of training solutions, from leadership development to sales strategy, all tailored to address the unique challenges of financial professionals.

To learn more about this award-winning sales effectiveness program, visit [Trustworthy Selling](#).

## About LIMRA

Serving the industry since 1916, LIMRA offers industry knowledge, insights, connections, and solutions to help more than 700 financial services member organizations navigate change with confidence. Visit LIMRA at [www.limra.com](http://www.limra.com).

## About Hoopis Performance Network (HPN)

Hoopis Performance Network (HPN) provides customized sales training, coaching, and performance development for financial professionals, helping them increase productivity and achieve their goals.



Join your peers and enjoy the many benefits of the NAIFA PLP

## NAIFA Professional Liability Insurance Program – Designed to meet the needs to today’s insurance professional

NAIFA members have a wide variety of professional liability needs given the diverse nature of their businesses in today’s financial landscape.

Whether an individual agent or an entity with multiple licensed professionals, the NAIFA E&O program is now more suited to deliver options to meet these varied needs and exposures to risk.

Go to [info@calsurance.com](mailto:info@calsurance.com) or call 800-745-7189

### E&O Renewal Reminder

Does your E&O insurance expire in the future? Click [HERE](#) for a reminder to check out the program.

### NAIFA SmartBrief

- House advances ACA enhanced subsidy extension
  - In-plan annuity sales nearly double from 2020
  - Expanded ABLE accounts prompt special needs planning review
- cached



## 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.

# acronyms

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



## **NAIFA-ARIZONA**

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# 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](http://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](http://www.naifa-az.org) and click on Continuing Education, then click on Virtual University. For any questions call 480-661-6393.

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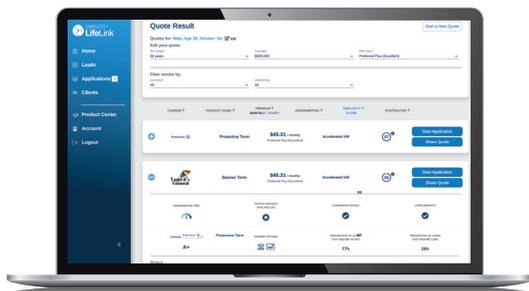
# Introducing



## Simplicity LifeLink™ Transforms The Way Life Insurance Is Sold, From Quoting to Application to Issue

### Simplicity LifeLink™ Supports

- ✓ Independent Agents and Advisors
- ✓ Financial Institutions
- ✓ Health Insurance Agencies
- ✓ Auto & Home Insurance Agencies
- ✓ Community Banks and Credit Unions
- ✓ BGAs & IMOS
- ✓ Insurance Call Centers



**Contact Simplicity Glendale to Get Started**

602.944.2220

mike.ford@simplicitygroup.com

www.simplicityglendale.com

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Phoenix, AZ 85012

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