



## 2009 LOMA Annual Conference and Conferment

September 13-15, 2009  
Hyatt Regency Grand Cypress  
Orlando, Florida

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The LOMA Annual Conference & Conferment addresses timely issues affecting the insurance and financial services industry, while honoring those who have recently earned a LOMA designation. The program features outstanding speakers who are sure to challenge and inspire, while offering top-level analysis about the state of our industry. Concurrent sessions inform about specific topics—leadership skills, time management, and more.

### Program Details

#### Sunday, September 13, 2009

**2:00pm – 7:00pm**

##### Registration

Pick up your official conference packet which includes your name badge, Disney Park ticket for Tuesday, program of events and much more!

**5:00pm – 7:00pm**

##### Welcome Reception – Hosted by LOMA Societies

Relax, mingle with colleagues, and network with industry leaders over drinks and hors d'oeuvres amid a lively party with an Orlando theme. All attendees are invited to discover how LOMA Societies benefit their communities and the financial services industry worldwide.

#### Monday, September 14, 2009

**8:00am – 10:15am**

##### Breakfast with a family-friendly program

Registered attendees, registered guests and registered kids over the age of 11 invited.

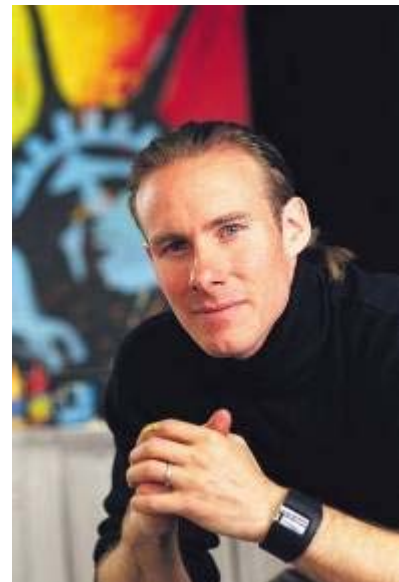
##### Welcome Address

##### The Art of Vision

##### Erik Wahl, performance artist

Break the boundaries, free the thought process, and rediscover your untapped potential. As the landscape for business continues to change a clear vision is the key to successfully navigating tomorrow's uncharted waters. The Art of Vision is a program specifically designed to help you utilize unconventional wisdom and build a vision for your future. By breaking apart traditional thinking, Erik Wahl challenges and inspires his audience to redefine commonly held assumptions and misconceptions about creativity, goals, and success.

Discover how you can sharpen your creative skills and identify a personal style for inspiring yourself and others to rethink vision and purpose. The principles in this uplifting and highly practical program will redefine the role of a leader as an artist as well as an architect.





### **The Power of Life Insurance**

**Melissa Wandall, Director, Mark Wandall Foundation**

Our industry has an important role to play in the lives of our clients, providing the financial advice and protection they need to achieve their goals and handle unforeseen circumstances. Wandall is proof of this. In October 2003, her husband was killed when a driver ran a red light. Hear how their financial planning not only allowed Melissa to remain in their home, but also helped her found the Mark Wandall Foundation which supports local charities, funds college scholarships, and hosts events to enrich the lives of children who have experienced loss.

**10:30am – 12:00pm**

### **Breakout Sessions (choose one)**

#### **Session A-1**

**Customer Service Best Practices: People First, Last, Always**

**Stacey White, Life Contact Center Department Manager, American National Insurance Co.**

Service professionals often need to be reminded to make people their first priority in order to achieve and maintain first-class service delivery. Come hear Stacey White go beyond the common practices and discuss other ways to reinforce important service skills. Learn how to leverage e-mail training, bulletins, motivational reminders, celebrations, service themes, and acknowledgements.



#### **Session A-2**

**Organizing Your Office and Your Life: Survive Information Overload and Clear the Clutter**

**Laura Stack, MBA, CSP, President, The Productivity Pro®, Inc.**

Do you get 100 emails every day? Do you feel like you're slowly drowning in a sea of paper? Does the sight of your messy office and overflowing email in-box frustrate you? Then this course is for you! You may work hard. But if you're disorganized, every step is a struggle. In this age of downsizing and a do-more-with-less mentality, efficiency is more important than ever before. This course will help staff members, professionals, and managers stay on top of it all. You will gain scores of new tips and techniques for bringing order into your life, both personally and professionally!

**12:00pm – 2:00pm**

**Lunch on your own**

**2:00pm – 3:30pm**

### **Breakout Sessions (choose one)**

#### **Session B-1**

**Maximizing Your Productivity with Technology. How to Use the Latest Tools, Templates, and Tricks**

**Laura Stack, MBA, CSP, President, The Productivity Pro®, Inc.**

We've become dependent upon computers, email, voicemail, the Internet, Blackberries, PDAs, cell phones, and pagers. These devices connect us to the world of work. Today, you must be technologically savvy. Technology can undoubtedly improve your productivity, but it can make you LESS productive if you're not careful. This seminar discusses how to use the latest technologies to your advantage, without letting technology take advantage of you.

#### **Session B-2**

**Product Trends in the Life Insurance Industry**

**Karen Terry, Manager, Product Research, LIMRA**

In today's rapidly changing environment, many industry professionals want more knowledge about new

products and product features, and which products are selling well. In this session, you will learn about new trends in life insurance, disability, and annuity product sales and product design. This session includes information taken from LOMA's Insurance Immersion program.

### **Session B-3**

#### **Educational Representative Overview, Part 1**

**Shannon R. Wortman, FLMI, PCS, AIAA, LOMA Registrar and Contact Center Manager**

In our special session for LOMA Ed Reps, find out what's new at LOMA: changes to the FLMI program, next steps after the Need 2 Know courses, professional networking for students and Ed Reps, plus updates on other administrative issues. Also, we will make sure you are aware of resources and tools available to help you in your role as Ed Rep.

**3:30 - 3:45 pm**

**Refreshment Break**

**3:45pm – 5:15pm**

**Breakout Sessions (choose one)**

### **Session C-1**

#### **Organizing Your Office and Your Life: Survive Information Overload and Clear the Clutter**

(Repeat from morning session)

**Laura Stack, MBA, CSP, President, The Productivity Pro®, Inc.**

Do you get 100 emails every day? Do you feel like you're slowly drowning in a sea of paper? Does the sight of your messy office and overflowing email in-box frustrate you? Then this course is for you! You may work hard. But if you're disorganized, every step is a struggle. In this age of downsizing and a do-more-with-less mentality, efficiency is more important than ever before. This course will help staff members, professionals, and managers stay on top of it all. You will gain scores of new tips and techniques for bringing order into your life, both personally and professionally!

### **Session C2**

#### **How to Live to 100 and Not Regret It**

**Adam Golden, MD, Co-author of The Real Truth About Aging**

As life expectancy continues to increase, so does the need to understand the consequences for ourselves and the implications for the insurance industry. What are your chances of living to 120? Is 40 the new 30?

Geriatric medicine expert Adam Golden will provide insights on the real truth about healthy aging and give an evidence-based analysis. Does a lifestyle of moderation really lead to longevity? Should we place more importance on adjusting our work/life balance? Gain insight into what is "old," trends in aging, and how to evaluate the risks of an aging population.

### **Session C-3 – Educational Representative Overview, Part 2**

**Shannon R. Wortman, FLMI, PCS, AIAA, LOMA Registrar and Contact Center Manager**

Ed Reps return for part II of the overview, and in this session we have set aside time to discuss issues and share best practices. Some topics may include: increasing pass rates, improving participation, motivating students, and gaining support from management.

## **Tuesday, September 15, 2009**

**8:00am – 10:00am**

**Breakfast Meeting and family-friendly presentations**

Registered attendees, registered guests and registered kids invited.



#### **Developing a Comic Vision**

**Tim Gard, CSP, CPAE**

Having a Comic Vision means to laugh when you can, be serious about the things you must, and actively use humor to balance stress. It's choosing to see the amusing side of situations that would normally be irritating, create stress, and ultimately reduce productivity. You'll learn new and better ways of taking your work seriously, and yourself lightly...

The key to responding to life's stresses positively lies in mastering your perception. How you think you should act or react to a situation determines your response. While you cannot always control the things that happen around (or to) you, you can certainly control your perception of those things with a strong and healthy Comic Vision.

Navigating life with a Comic Vision allows you to see the humorous side of potentially irritating things and laugh at them—or even avoid them altogether! As physical and emotional benefits of laughter continue to be understood, you're better able to apply natural and uplifting stress relieving techniques. At the end of this presentation you will know how to build an enjoyable and productive work environment for your co-workers, your clients and everyone else you encounter throughout the day.

#### **Presentation of LOMA Insurance Education Award**

Kathy Milligan, FLMI, ACS, ALHC  
Vice President, Education & Training Divisions  
LOMA

#### **10:15am**

#### **Excursions – Discover Disney!**

All registered attendees and their registered guests and registered children will receive a ticket to the Disney Park of their choice. The options include:

- **Magic Kingdom**
- **Epcot**
- **Hollywood Studios**
- **Animal Kingdom**

Please let us know when you register which park you prefer to attend. We need this information to make sure we have enough transportation to each park. You will be able to change your park choice up to the day of the event.

#### **7:00pm**

#### **Conferment Banquet**

New designees for all LOMA programs are the focus of the evening and are honored collectively during the Conferment Ceremony at the opening of the event. Special awards are given for outstanding achievements. Following will be great food, lively dancing, and a memorable after dinner show created for your entertainment with a special message for everyone who has worked hard to achieve their designation. Dress is coat and tie for men; cocktail attire for women.

#### **Children's Party**

#### **Coincides with Conferment Banquet at 7:00pm**

The children's party includes dinner and takes place on site at the Hyatt Grand Cypress Hotel.. Professional leaders are certified in CPR and first-aid and offer secure check-in/check-out procedures. Games and activities offered are age-appropriate for children between 5-14 years of age.



**Frank Miles: Juggling Life's Challenges, Laughing at Fear**

### **Registration Fee**

#### **If you register by August 17, 2009:**

|                             |          |
|-----------------------------|----------|
| LOMA Members                | US \$695 |
| LIMRA (not LOMA) Members    | US \$815 |
| Non-Members                 | US \$935 |
| Educational Representatives | US \$400 |
| LOMA Society Officers       | US \$490 |

|       |                                  |
|-------|----------------------------------|
| Guest | US \$250                         |
| Child | US \$80 (per child, ages 5 - 14) |

**If you register after August 17, 2009**

|                             |                                  |
|-----------------------------|----------------------------------|
| LOMA Members                | US \$745                         |
| LIMRA (not LOMA) Members    | US \$865                         |
| Non-Members                 | US \$985                         |
| Educational Representatives | US \$400                         |
| LOMA Society Officers       | US \$490                         |
| Guest                       | US \$250                         |
| Child                       | US \$80 (per child, ages 5 - 14) |

**Registration Fees include:**

- Admission to all general sessions, concurrent sessions, welcome reception, two continental breakfasts, excursion on Tuesday, and the conferment banquet.
- Guest registration fees includes admission to all conference events listed above. LOMA policy allows the purchase of one guest registration per full paid registration. Guest cannot be a new designee.
- Children’s fee (ages 5 – 14) includes welcome reception, excursion ticket on Tuesday with parent and children’s party with dinner on Tuesday evening during the conferment banquet.
- Due to liability restrictions, we cannot accept children under the age of five to participate in any of the events.

**Refund Policy**

LOMA requires all cancellations or refund requests be received in writing. These requests carry a \$75.00 U.S. administrative charge. Full refunds minus the administrative fee will be granted on written requests received no later than 3 business days before the meeting start date. No refunds will be granted if the request is received within 3 business days of the meeting. If for any reason a meeting is cancelled, LOMA will refund the total registration fee. However, LOMA will not be responsible for any travel, hotel accommodations or other costs incurred.

**Hotel Information**

**Hyatt Regency Grand Cypress**

One Grand Cypress Boulevard  
Orlando, FL 32836

For reservations, call 407-239-1234 or 1-800-233-1234.  
Be sure to mention LOMA.



The rate for the LOMA Annual Conference and Conferment is \$159.00 per night, single or double, plus tax. Please make your hotel reservations by August 17. Reservations after August 17 will be based on availability.

The LOMA special rate is applicable 3 days before and 3 days after the conference. Take advantage of our low LOMA hotel rate and stay an extra day or two! Enjoy the complimentary use of the private lake, boating/sailing, nature trails, tennis courts, health club, rock climbing wall, Pitch 'n Putt, bicycle rental, and much more! With all of the amenities, you can make it the vacation you have been wanting to take this year!

**Conferment Eligibility**

To be eligible for conferment, students must complete a LOMA designation by August 27 of that year.

However, individual organizations may have different eligibility deadlines for conferment qualification. Please refer to your organization's conferment coordinators for company-specific requirements.

**Attire**

The dress code for the seminar is business casual. Attire for the banquet is coat and tie for men; cocktail attire for women.

**Future Annual Conferences**  
**LOMA's Annual Conference & Conferment**

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| Las Vegas, Nevada — September 12-14, 2010 — The Mirage         |
| Montreal, Canada — September 11-13, 2011 – The Queen Elizabeth |

**For More Information**

LOMA Meetings

Tel: 1-800-275-5662, ext. 5. / 770-984-3714

Fax: 770-984-6419

E-mail: [meetings@loma.org](mailto:meetings@loma.org)

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