

# AFMP

Alliance of Financial Marketing Professionals



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2007  
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## AFMP President's Letter "Kicking Off The New Year"

BY STEVE KOZA, CSA, LUTCF

I'm taking time between Christmas and New Years to write a first letter as Chairman of the AFMP. My initial thoughts are it's a privilege to serve you in 2007 in this capacity. With that said, I bounce back and forth between what happened during 2006 and what portends for 2007. I have a big smile on my face!

I have a very big smile on my face when I reflect over the events at our September meeting at the Hapuna Beach Prince Resort on the big island of Hawaii ----- if I had to create a word for this AFMP membership meeting it would be "fantabulous." In my 20+ years as a member of this group I cannot recall a better overall blend of location, property, speakers, and bonding among the attendees. For those of you who could not attend PLEASE ask about this experience from a member who was in Hawaii ..... It really was both memorable and phenomenal!

Speaking of meetings, MARK YOUR CALENDARS now, for our Spring meeting at the brand new, highly heralded, and wildly popular Red Rock Resort, NEAR downtown Las Vegas (yes, NO traffic to contend with). This meeting will take place April 29<sup>th</sup> thru May 1<sup>st</sup> with an array of speakers that will absolutely enhance your personal stature in the insurance and financial arena. In the Fall we travel to the Ojai Valley Inn & Spa in the Santa Barbara area of Southern California from September 16<sup>th</sup> thru the 18<sup>th</sup>. This is another "to-die-for" destination resort, replete with a \$90 million dollar total renovation and according to Conde Naste, a top-5 property for the entire United States!

And now on to something else ..... A vision of the AFMP for 2007 and beyond. YOUR Board of Directors, and let me name them, as they put in countless hours of effort and energy into making this 44 year old group (yes, we were founded in 1963) work, and work well. Thank you Carroll Fadal, Jim Nelson, Bruce Seymour, Peter Konrad, John Uttz, and Sal Petrazzella. Also, a very special "thank-you" to one special lady, the "mother-in-spirit" of the AFMP who acts as the special glue that binds us together ----- Lynette Owens ---- and, thank you for keeping us on the righteous path for 25 years!

To the left of this letter is the AFMP Mission Statement ..... Please take a moment to read it. We are now a diverse group, from life insurance Regional Directors and Marketing Officers to Presidents of Independent Marketing Organizations. We are the ONLY group of its kind within the entire United States. We are the ONLY forum where we all can discuss issues and topics that are germane to our particular jobs. You should wholly endorse and cherish this type of an interactive organization. All of this leads me (finally) to a question and challenge for all of you and it surrounds two words ..... membership and recruiting ..... Something that we all do for a living but take for granted in regards to the AFMP. We need new members, new blood, and new thoughts and ideas to secure the future for the AFMP. To this end, I have called upon our Immediate Past Chairman, Carroll Fadal, to assist me in spring-boarding our recruiting plans. It will work like this..... PLEASE TELEPHONE either myself at 800-695-0543 or Carroll at 254-745-6312 with a name, company, and telephone number of an associate whom you wish to place in nomination to the AFMP. Our promise to you is that we will take the time to follow-up, therefore securing new members as well as securing the future of our organization.

Finally, one last item ..... the AFMP has instituted a Legacy giving program that we hope will help perpetuate the AFMP for generations to come. Please consider making a Platinum (\$100), Gold (\$75), Silver (\$50), or Bronze (\$25) contribution towards our group. You'll find the appropriate form on the website.

Good Selling In 2007!  
Steve Koza

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The purpose of the Association shall be to provide a means through which Marketing Officers as well as principals of marketing associations, licensed and doing business in the United States, may exchange ideas and provide a forum for discussion concerning all areas of their responsibilities as Financial Marketing Professionals.

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**SAVE THE DATES...  
AFMP Upcoming Meetings**

**Red Rock Casino, Resort & Spa  
Las Vegas, NV  
April 29 - May 1, 2007**

**Ojai Valley Inn & Spa  
Ojai, CA  
September 16-18, 2007**

Look for more information about these properties in the days to come, but don't forget to mark your calendars today.

We will also be updating our website ([www.theafmp.com](http://www.theafmp.com)) to keep you fully informed.

**red rock**  
CASINO • RESORT • SPA  
Las Vegas



**AFMP Membership**

Effective January 1, 2006, the definition for membership in our organization will include those individuals responsible for recruiting, training and development within their respective financial services organization. This includes positions within Financial Services Companies, IMOs, and Financial Intermediaries, such as Regionals, Wholesalers, and Executives with responsibility for Life and Annuity sales. An Associate member will be a person affiliated with any financial services organization. There are several compelling reasons why a person would want to become an AFMP member:

- Opportunity to give back to our profession
- Reaffirm commitment to the industry
- Professional and dynamic speakers on industry related topics
- Be on top of industry changes as they occur
- Become a more valued professional within your company
- Provides introductions to speakers and sites for your own or your Company's future meetings
- One of kind bi-annual meetings for industry professionals.
- Five star properties, great sports action and spouse programs

**Board Members**

Chairman: Steve Koza  
1<sup>st</sup> Vice Chair: Jim Nelson  
2<sup>nd</sup> Vice Chair: Peter Konrad  
Treasurer: Jim Nelson  
Secretary: Bruce Seymour  
Membership: John Uttz  
Program Chair: Mickey Batsell  
Asst. Program Chair: Sal Petruzzella  
Communication Chair: Peter Konrad  
Asst. Membership Chair: Bruce Seymour  
Immediate Past Chair: Carroll Fadal

**LYNETTE OWENS & ASSOCIATES**

Hotel/Site Selection Firm

The timing of AFMP meetings allows members to conduct their company's business in conjunction with the Association meetings. This format makes attendance at meetings both productive and cost effective! As AFMP's designated site coordinator, Lynette Owens & Associates, a hotel marketing firm specializing in the insurance market, is able to provide special rates for our meetings at premier locations.

PO Box 5005 #55  
Rancho Santa Fe, CA 92067  
Phone: 858-759-0510  
Fax: 858-759-9194  
Email: [LynetteOwens@lynetteowens.com](mailto:LynetteOwens@lynetteowens.com)

**Become a Member...**

Our annual dues of \$100 offer our membership as well as an opportunity to share ideas and experiences with a group of people dedicated to growth in sales and marketing of financial products.

Look for an updated membership enrollment application on our website:

[www.theafmp.com](http://www.theafmp.com)

If you are interested and would like more information, please send this portion of the newsletter with your contact information to our Membership Chair, John Uttz at: Mutual Trust Financial Group: 2030 East 4th St., #201 Santa Ana, CA 92705

NAME \_\_\_\_\_

TITLE \_\_\_\_\_

COMPANY \_\_\_\_\_

PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_