

Edition 2/September 2011



Playbook

NAIFA Leadership in Life Institute

www.naifa.org/lili

www.Facebook.com/NAIFALILI

www.facebook.com/groups/lilialumni

LILI Alumni Networks...

an array of benefits and networking opportunities reserved for LILI grads



- ▶ **LILI Alumni Networks** at NAIFA Conference: complimentary workshop reserved for alumni
- ▶ **LILI Alumni Networks on Facebook**: online social networking site exclusively for alumni
- ▶ **LILI Leaders & Alumni News**: bi-monthly e-newsletter for alumni and NAIFA leaders
- ▶ **LILI Alumni Playbook**: published annually to promote and support alumni groups
- ▶ **LILI Leaders Networks**: listservs for online networking among LILI moderators and chairs
- ▶ **NAIFA Online Leaders Training Center – LILI Tools for Leaders** to build state LILI teams

ALUMNI RELATIONS MISSION STATEMENT

The Alumni Relations Team promotes LILI's legacy by bridging its past with the present and the future. The Team works to unite students and alumni seeking to engage in a lifelong connection developing trust, sharing knowledge, and strengthening their bond with the LILI family.

HISTORY & ALUMNI

- 1998:** The Leadership Development Task Force is appointed by NAIFA 1998-99 President Larry Lambert to address the lack of qualified leaders to envision and execute the objectives of the federation. The Task Force, chaired by 2009-10 President Tom Currey, begins work on a leadership development curriculum to be administered by state associations.
- 2000:** The Institute is held in two pilot states – California and Texas.
- 2004:** LILI 7 Leadership Workshop is introduced at the NAIFA Conference in Las Vegas.
- 2006:** The Institute is held in a majority of states (35) and enrollment increases by more than 60%. Nearly 300 students graduate.
- 2008:** Alumni e-newsletter is introduced.
- 2009:** 10th Anniversary is marked with launch of LILI Alumni Online – a networking site exclusively for grads.
- 2010:** NAIFA Conference is expanded to include a new workshop for alumni (LILI Alumni Networks) and the *LILI Alumni Playbook* is unveiled. The popular LILI 7 Leadership Workshop is opened to all.
- 2011:** LILI Alumni Networks on Facebook, an online social networking group exclusively for grads, is launched along with a second Facebook page for the general public.

Now in its 12th year, LILI has been held in nearly every state with most states hosting the Institute every year. By the end of 2011, alumni will top 2000.

www.naifa.org/lili

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Greetings LILI Alumni!

Since we met with you last Fall when the first edition of the LILI Alumni Playbook was unveiled at the NAIFA 2010 Career Conference, another class has graduated and our alumni groups have grown. The feedback to the first edition of the Playbook was very positive with several leaders reporting successful implementation of ideas and activities, and others feeling newly inspired to build their own Alumni Group.

The Playbook was developed in response to the overwhelming demand for ideas and activities that Alumni Groups might host. This second edition is enriched with more “State Alumni Happenings” and a roster of graduates by state so that leaders can identify their graduates and begin building their Alumni Group.

We know that our graduates are our credibility and we hope to have strong alumni representation in our states and regions. It is our sincere wish that you find this Playbook a helpful foundation to launch or grow your LILI Alumni Group. Once organized, a continued effort is essential to long-term success and ensuring a meaningful experience for those who take part.

Our heartfelt thanks go to our LILI family and alumni who have contributed ideas, agendas, and thoughts to this Playbook. We are especially grateful to the New Mexico and Texas leaders who hosted one- and two-day events this past year. They have shared the details with us and their events are featured in this edition.

A handwritten signature in black ink that reads 'Susan'.

Susan P. Martin, MSM, CLU, ChFC, RHU, REBC, LUTCF
National LILI Alumni Relations Chair

LILI MISSION STATEMENT

THE NAIFA LEADERSHIP IN LIFE INSTITUTE (LILI) DEVELOPS LEADERS BY FOSTERING PERSONAL GROWTH, ENHANCING BUSINESS PRACTICES, AND DEVELOPING SKILLS NECESSARY FOR EFFECTIVE LEADERSHIP.

LILI ALUMNI RELATIONS MISSION STATEMENT

THE ALUMNI RELATIONS TEAM PROMOTES LILI'S LEGACY BY BRIDGING ITS PAST WITH THE PRESENT AND THE FUTURE. THE TEAM WORKS TO UNITE STUDENTS AND ALUMNI SEEKING TO ENGAGE IN A LIFELONG CONNECTION DEVELOPING TRUST, SHARING KNOWLEDGE, AND STRENGTHENING THEIR BOND WITH THE LILI FAMILY.

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HOW TO START YOUR OWN ALUMNI GROUP

“OUR GRADUATES ARE OUR CREDIBILITY”

As the LILI alumni family grows and participating states acquire a greater pool of alumni, the opportunity emerges to develop state- or regional-based alumni associations that can provide ongoing support, networking, and growth opportunities for our graduates. If your state does not have an Alumni group and you would like to help build an alumni association in your state, please contact your state leadership. You may also contact any member of the LILI subcommittee for assistance.

Starting an Alumni Group will require the leadership, enthusiasm, and willingness of several individuals who are prepared to take on the organizational initiative and sustain it. It will be a challenging yet rewarding opportunity to enhance the LILI experience for yourself and our LILI family.

Getting Started

1. Talk with your State LILI Chair, State Leadership, and State Exec to obtain commitment, solicit feedback and ideas, and keep them apprised of the direction of the group.
2. Form an Alumni Committee. Identify Alumni in your state and region and recruit them to be on the Alumni Committee (if your state/region does not have a list of Alumni contacts already, this is the perfect opportunity to start one).
3. Any organization needs structure; establish your purpose early and spend some time drafting a vision and a mission for your Alumni Group. In areas where alumni concentrations are relatively small, an informal association led by one or two individuals who might gather socially from time to time is fine. It's OK to keep it simple!
4. Decide how you will communicate with your Alumni to announce events – newsletter, telephone, email, list serve, and other social media? Remember that you may find some alumni who are not as computer savvy as others, so make sure that everyone will get the messages and information about your events. If you will use several forms of communication, make sure that the information is the same.
5. Plan your event. Programs can include leadership activities, social functions, and community service events (see the fabulous ideas later on in this Playbook). Consider meeting topics that align with your vision and mission. Determine your logistics: location, cost, time, meals, materials needed. It is critically important that you establish *Who on the Committee Does What by When* along with a timeline for completion of tasks.
6. Communicate and promote your events. Enthusiastically spread the word about your event as early as possible, and keep spreading it!
7. Host your event. Remember to welcome your attendees and thank them for attending!
8. Conduct a session debrief through personal contact with each participant.

“LILI REUNION”

- New Mexico hosted its first LILI Reunion and brought graduates together for an all-day event that included a movie, book discussion and dinner (*See detailed New Mexico LILI Reunion on following pages*).

“THE LILI SUMMIT”

- Participants discuss books, movies, have speakers, and bring business plans to compare/contrast to original documents with their Alumni Group. This can be done annually, quarterly, or expanded to regularly scheduled lunches in an office conference room. (*See detailed Texas Alumni Summit on following pages*)

BOOK/MOVIE/BUSINESS DISCUSSIONS

- Announce a book or a movie and have a brown bag lunch to discuss.
- Host a brown bag lunch the day prior to the NAIFA State Convention or NAIFA Career Conference and Annual Meeting. Review a book or your business plan, vision, mission, etc.
- Schedule regular time with Alumni to help each other solve problems within your businesses.

COORDINATE WITH YOUR STATE CONVENTION OR NATIONAL CONFERENCE

- Schedule a specific time period for your LILI Grads to meet at your State Convention or at the annual NAIFA Career Conference and Annual Meeting.
- Present a LILI scholarship sponsored by your Alumni Group at your state’s annual meeting.

RECRUITMENT PREPARATION EVENTS

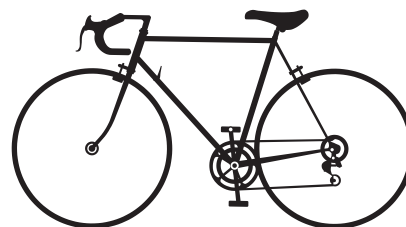
- Make it the LILI Alums’ “job” to recruit new students. Have a recruitment meeting where LILI applications, brochures, and information are handed out. Have your Alums practice their “Elevator Speech” for candidate recruitments on each other. Visit NAIFA Marketplace to order LILI promotional materials.
- Provide your members with a “taste of LILI” by showing the LILI Program in a Box at a local or state association meeting (“*Leveraging LILI Tools to Improve Your Practice*”). This PIB is available at no charge through the NAIFA Online Leaders Training Center and Marketplace.

CONTINUING EDUCATION

- Partner with your State or Local Programs and Professional Development Chairs to host a continuing education event for all members.
- Utilize NAIFA Webinars and Programs in a Box – archived, available anytime, and perfect for a monthly meeting or special seminar.

COMMUNITY SERVICE

- Host a charity event such as a golf tournament.
- As a group, donate your time to a group such as the Special Olympics; wrap gifts at the mall during the holiday season; or ring the bell for the Salvation Army.
- Sponsor a family and gather food for a Thanksgiving food basket.
- Approach local retailers such as WalMart and Kmart to donate bicycles to less fortunate families for holiday gifts (one group made a party out of assembling the bicycles themselves — hopefully the group was assembled with a good mix of reds, yellows, blues, and greens!)



New Mexico held its first LILI reunion on Friday, October 8, 2010 at the Hard Rock Hotel in Albuquerque. The event included a group reception and dinner as well as an exercise to put the LILI brain trust (grads) to work on an issue that impacts the future direction of their state association. The group input was passed on to the state and their suggestions are now being implemented. The event was organized by Sherry Flynn, Lynda Turner and Randy Wimsatt. The agenda and highlights are presented here and can be utilized by other alumni groups.



“Would You Like To Fly...”

1:00 – 1:05 pm	Video (Earl Nightingale): <i>The Strangest Secret – How to Live the Life You Desire</i>
1:05 – 1:15 pm	Introductions – Ice Breaker <i>Where were you born?</i> <i>How many siblings do you have?</i> <i>Describe yourself with one (1) word and one (1) word only</i>
1:15 – 1:30 pm	Significant LILI Life Changes – Personal and/or Business
1:30 – 2:45 pm	Dreams and Secrets <i>Put Your Dream to the Test – John Maxwell</i> <i>Secrets of the World Class – Steve Siebold</i>
2:45 – 3:15 pm	BREAK
3:15 – 3:30 pm	Movie Review: <i>The Blind Side</i>
3:30 – 4:15 pm	Problem Solvers: <i>What IF? ~“A State of Flux”</i>
4:15 – 4:20 pm	Video: <i>212 Degrees</i>
4:20 – 4:30 pm	LILI Alumni Update
4:30 – 4:40 pm	Closing Remarks
4:40 – 4:45 pm	Evaluations
5:00 – 6:00 pm	Reception: <i>Lucha Restaurant – 3rd Floor</i>
6:00 pm	Banquet: <i>Lucha Restaurant – 3rd Floor</i>

Okay, you may be saying to yourself, I've got a dream. I think it's worth pursuing. Now what? How can I know that my odds are good for achieving it? To assist you in putting your dream to the test, respond to each of the three statements under the dream questions below by answering True or False. These questions comprise the ten chapters of John Maxwell's book *Put Your Dream To The Test*.



10 QUESTIONS - DREAM AUTOPSY

- The Ownership Question:** Is my dream really my dream?
I would be the person in the world most pleased if I accomplished my dream. T F
I have publicly shared my dream with other people, including those I love. T F
My dream has been challenged by others, and I still embrace it. T F
- The Clarity Question:** Do I clearly see my dream?
I can explain the main gist of my dream in a single sentence. T F
I could answer nearly any question about the what (if not the how) of my dream. T F
I have written a clear description of my dream that includes its main features or objectives. T F
- The Reality Question:** Am I depending on factors within my control to achieve my dream?
I know what my greatest talents are, and my dream relies heavily on them. T F
My current habits and daily practices strongly contribute to the potential success of my dream. T F
My dream is likely to come true even if I am unlucky, if important people ignore or oppose me, or if I encounter serious obstacles. T F
- The Passion Question:** Does my dream compel me to follow it?
I can think of nothing I would rather do more than see my dream fulfilled. T F
I think about my dream every day and often wake up or fall asleep thinking about it. T F
This dream has been consistently important to me for at least a year. T F
- The Pathway Question:** Do I have a strategy to reach my dream?
I have a written plan for how I intend to accomplish my dream. T F
I have shared my plan with three people I respect to get their feedback. T F
I have made significant changes to my priorities and work habits to put my plan into action. T F
- The People Question:** Have I included the people I need to realize my dream?
I have surrounded myself with people who inspired me and who are honest with me about my strengths and weaknesses. T F
I have recruited people with complementary skills to help me accomplish my dream. T F
I have transferred the vision for my dream to others, and they share ownership for it. T F
- The Cost Question:** Am I willing to pay the price for my dream?
I can recount specific costs I have already paid toward achieving my dream. T F
I have already considered what I am willing to trade to achieve my dream. T F
I will not be compromising my values, ruining my health, or damaging my family to pursue my dream.
 T F

8. **The Tenacity Question:** Am I moving closer to my dream?

I can identify obstacles I have already overcome in the pursuit of my dream. T F

I do something every day—even if it's very small—to move closer to my dream. T F

I am willing to do extraordinarily difficult things to grow and change so that I can accomplish my dream.

T F

9. **The Fulfillment Question:** Does working toward my dream bring satisfaction?

I am willing to give up my idealism in order to make my dream become reality. T F

I am willing to work for years or even decades to achieve my dream because it is that important to me.

T F

I enjoy the pursuit of my dream so much that even if I fail, I will consider my life to have been well spent.

T F

10. **The Significance Question:** Does my dream benefit others?

I can name specific people other than myself who will benefit if my dream is realized T F

I am working to build a team of like-minded people to accomplish my dream. T F

What I'm doing to achieve my dream will matter in five, twenty, or one hundred years. T F

Alumni were given opportunity to discuss the “autopsy” and identify the dream they want to “bring to life”. The topics **Roadblocks** (refer to *10 Questions* to identify your roadblocks) and **Passion** (which fuels the dream) were also explored.



Tricks and Tips:

- Registration took place one-half hour prior to start time
- “Musical Chairs”—The purpose was to create diversity based upon their year of graduation, temperament and style. Color coded notebooks were provided to alumni as they registered. Each individual selected seat of choice upon entering the meeting room. They were then directed to look at the back of their notebook for color and take a seat with like colors that corresponded with room seats.
- “On Time Drawing” with small prizes was an effective incentive to get all attendees into the room to start on time and following break.
- Attendees received a drink ticket when they turned in their evaluation.

From NAIFA-Texas Newsletter - February 2011

Leadership in Life Institute (LILI) Alumni Summit Held in Austin

Thirty alumni braved the freezing temperatures and early morning power outages to attend the 3rd annual Texas LILI Alumni Summit (reunion) held February 1-2, 2011 following NAIFA-Texas' Legislative Day events. This year's Summit was chaired by 2009 LILI graduate and NAIFA-Austin President-Elect Douglas B. Richards, JD, CLU, ChFC.

The session was kicked off by co-founder of the Texas LILI program Glen Baecker, CLU, emphasizing the importance of servant-leadership in the local associations. The discussions continued through the evening hours where breakout groups focused on several topics which included: the manner in which members are invited to serve on the local board; how local leaders are prepared for leadership; the purpose of annual planning meetings and how they should be conducted; and the role of IFAPAC and how it should be introduced and promoted.

The next day's agenda was co-moderated by 2004 LILI graduate and incoming National LILI Chair Chris Hatton and 2008 LILI graduate Geordie Hrdlicka, JD, LLM, CFP. The moderators incorporated the works of Stephen Covey's *Habit 5: Seek First to Understand, Then to be Understood* as the focus of the morning's workshop. Next, NAIFA-Texas 2011 Chair and co-moderator Karen Easterling discussed perceptions and leadership styles from the required viewing material "homework assignment" *12 Angry Men*. Following this discussion, 2003 LILI graduate and NAIFA-TX Trustee Lane Boozer, LUTCF, passionately extolled the virtues of the second movie *The Great Escape*.

Chris and Geordie ended the Summit with a class on time management. For many, it was a perfect finish to a full two days' activities.



**WESLEY MCNIGHT AND
JASON TALLEY**



KAREN EASTERLING



**DOUG RICHARDS AND RANDY
ROBERTSON**

[Click to view more photos from the LILI Summit](#)

Notes:

- Texas has an alumni pool of 130
- Fee for the 2-day event was \$100 per person
- See Detailed Agenda on the following page



LILI Summit 2011

February 1-2, 2011

State Farm Agency Field Offices Conference Room - Austin, TX

Tuesday, February 1

- | | |
|-----------------|---|
| 3:00 pm | Introduction – Doug Richards, Chair |
| 3:15 pm | Ice Breaker... <i>Story of My Life</i> – Karen Easterling |
| 3:30 pm | Workshop Session – Glen Baecker
<i>What you Don't Know That you Don't Know</i> |
| 5:30 pm | BREAK for Dinner/Return to Hotel
Springhill Suites |
| 6:00 to 6:30 pm | Gather for Dinner at Restaurant
Buca di Beppo |
| 6:30 to 8:00 pm | Working Dinner
(5 tables of 6 – assigned seating) |

Wednesday, February 2

- | | |
|-------------------|--|
| 8:00 to 10:00 am | Workshop Session – Chris Hatton/Geordie Hrdlicka
<i>Seek First to Understand, Then to be Understood</i> |
| 10:00 to 10:15 am | BREAK |
| 10:15 to 11:30 am | <i>Differences in Perception</i> – Chris Hatton/Geordie Hrdlicka |
| 11:30 am to Noon | Discussion of Movie – Karen Easterling
<i>12 Angry Men</i> |
| Noon to 1:00 pm | Lunch w/ Discussion of Movie – Lane Boozer
<i>The Great Escape</i> |
| 1:00 to 2:00 pm | <i>Time Management</i> – Chris Hatton/Geordie Hrdlicka |
| 2:00 to 2:30 pm | Completion of Evaluation Forms – Doug Richards |
| 2:30 to 2:45 pm | Wrap Up – Doug Richards |

[Click to view photos from the LILI Summit](#)

LILI Summit 2011

A. Summit Expectations

1. What expectations did you have of LILI Summit 2011?
2. Were your expectations met?

B. Evaluation of the Presenters

1. Moderators. A moderator is one who guides a group's discussion to a foregone conclusion. The moderated workshops include *What you Don't Know That you Don't Know* followed by Seek First to Understand, Then to be Understood and Differences in Perception. How well did our moderators guide their discussions?
2. Discussion leaders. A discussion leader is someone who leads a discussion about a pre-assigned topic (no foregone conclusions). How well did our discussion leaders present the movies 12 Angry Men and The Great Escape?
3. Classroom-style Teachers. Classroom-style teaching is based more on a lecture-style format. How effective was our tag-team in teaching the class on Time Management?

C. Evaluation of the Subject Matter

1. Were the subjects timely with respect to what you may be experiencing in your home/family, business/community, church or other faith-based work?
2. Was the amount of time devoted to each subject appropriate?
3. Was there adequate time to socialize?

D. Evaluation of the LILI Summit Committee

1. Were the communications you received appropriate and timely?
2. Did the organization of the subject matter, structure of the classes, working dinner format, etc. hold your interest? Was there sufficient variety in presentation?
3. Do you feel you received adequate value for the time, effort and money spent?

E. LILI Summit 2011 Objectives

1. Did you feel like the objectives of the Summit were accomplished:
2. Were old friendships, acquaintances, and associations renewed and strengthened?
3. Were the principles you learned in LILI enhanced and strengthened?
4. Are you taking home concrete ideas that will help you build and/or strengthen your local association? Do you feel more dedicated to doing so?

Note: The actual Evaluation Form allowed space to answer each question and participants were asked to provide as much explanation as possible.

Arkansas Activity

PRESENTED BY CAMMIE SCOTT, LILI MODERATOR 2008, 2011. 2011 NATIONAL LILI SUBCOMMITTEE CHAIR



For the past three years, Arkansas grads have held an event at their state convention. In 2010, we used Patrick Lencioni's book *Getting Naked*. Each person read the book and retook the Harvard Temperament Test. We then had a moderator lead a discussion of the model presented in the book followed by a discussion on how we could apply this to our individual practices. After the event, we had lunch together at a nearby restaurant and continued the discussion.

In 2009, we explored John Maxwell's book *Leadership 101*. We split the topics and used two moderators to facilitate discussions. Participants read the book which is an easy read, and the moderators presented a brief introduction of each chapter followed by discussion questions. We ended with a time of reflection of how to apply the principles we had learned to our lives. The event took place in the morning before the golf tournament at our state convention. We charged \$10 per person to cover the cost of snacks and materials. The event ended by noon and alumni ate lunch together at the golf tournament.

In 2008, we used the book *Juggling Elephants* and met on the first day of our state convention. Each person paid \$15 to participate and this fee covered the cost of the room, supplies and refreshments. *Juggling Elephants* is an easy-to-read book that compares life to a 3-ring circus. The state LILI chair and moderators each took a "ring" for the discussion. We divided the room into 3 tables and 3 groups of people. Each presenter gave a short introduction and facilitated discussion questions. This event lasted three hours and was followed by a group lunch.



NOTES: _____

Colorado Model Ensures Continuity

PRESENTED BY DEBBIE PEARSON, LILI MODERATOR 2010, 2011

To ensure consistency in our LILI program, NAIFA Colorado follows a specific succession process designed by alumni and revolving around a core leadership team of the State LILI Chair, Moderator and Co-Moderator. Alumni on this team serve for three years as follows:

- Year One Co-Moderator
- Year Two Lead Moderator
- Year Three State LILI Chair

The Co-Moderator and Lead Moderator help recruit candidates for each institute and split classroom duties and monthly communications with the class. The Lead Moderator also handles the initial class communications, setting up speakers, thank you cards, logistics, class materials, collecting homework/ feedback forms and commencement preparation. The State LILI Chair handles the marketing for each institute including follow up with prospective candidates and moderators, collecting applications, verifying all forms are complete, setting up the selection committee, following up with candidates, collecting money, assisting the moderators with class logistics and keeping track of volunteer commitments. We have a male and female moderator each year and in addition to the three years of service, they commit to replace themselves.

The State LILI Team also includes:

- State Executive – assists with marketing & logistics
- State Executive Committee – Liaison to Locals
- Alumni – Marketing, follow up and alumni events



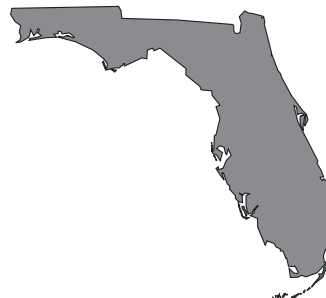
Florida Fulfilling the Promise

PRESENTED BY STEVE SALADINO, 2011 STATE LILI CHAIR

NAIFA-Florida LILI Alumni members had a social at the State Convention in Clearwater, Florida last year to catch up with each other, promote LILI and attract prospective students, but the majority of our time has been spent fulfilling our LILI 2-year obligations/responsibility to give back.

Many of us have promoted LILI across the state and are responsible for appointing new co-chairs (succession planning) and recruiting prospective students; others have moderated a class or have continued to lead by example by serving on the state board.

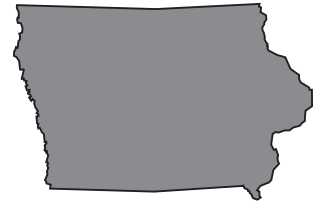
We can demonstrate our LILI leadership by way of listing the percentage or number of LILI Grads that hold leadership positions on our state board: 79% of the NAIFA-Florida board are LILI grads or current LILI participants/aspirants (11 out of 14).



Iowa Alumni Reunion

CONTRIBUTED BY STEVE DEWEY, CLASS OF 2010 AND MICHELE GRASSLEY CLAKE, IOWA STATE EXECUTIVE, CLASS OF 2010

Iowa's first alumni reunion was held on May 4, 2011 at the State Convention in Dubuque with 24 grads participating. The event focused on an inspirational movie with strong leadership themes.



Movie Review

Invictus is a sports drama film based on the book by John Carlin, *Playing the Enemy: Nelson Mandela and the Game That Changed a Nation*, about the events in South Africa before and during the 1995 Rugby World Cup which was hosted in that country following the dismantling of apartheid. After 27 years in jail, Mandela works immediately to bring about the end of apartheid and is elected President of South Africa in 1994. His immediate challenge is balancing black aspirations with white fears. The movie demonstrates strong leadership skills that are exemplified by Mandela and his new ally – Francois Pienaar, the captain of the Springboks rugby team. This is an amazing storyline about a country united through the sport of rugby. Many of Stephen Covey's *7 Habits* or John Maxwell's *21 Irrefutable Laws of Leadership* are easily identifiable in the film.

Advance Assignment

In preparation for the Alumni Reunion, please watch the movie *Invictus* and read the following:

From *The 7 Habits of Highly Effective People* – Stephen R. Covey

- Read about “Circle of Influence and Circle of Concern” (p. 82-85)
- Read about the “Emotional Bank Account” (p. 82-85)
- Read about the “WIN/WIN Paradigm” (p. 207)
- Read the 5th Habit – “Seek First to Understand, then to be Understood” (p. 239-243)

From *The 21 Irrefutable Laws of Leadership* – John C. Maxwell

- Read “The Law of Influence” (Law #2)
- Read “The Law of Navigation” (Law #4)
- Read “The Law of Victory” (Law #15)

Discussion Questions

1. How did Nelson Mandela deal with his circumstances? Did he follow Habit 1 – Be Proactive?
2. Where were the paradigm shifts (or breaks with tradition) in this movie?
3. Covey talks about making deposits into an “Emotional Bank Account” (the amount of trust that’s been built up in a relationship). How did Mandela make these deposits?
4. How did Mandela utilize the WIN/WIN Paradigm of human interaction where all parties feel good about the decision and feel committed to the plan?
5. How did Mandela use the 5th Habit – “Seek First to Understand, then to be Understood”?
6. How did Francois Pienaar and his rugby team use the 5th Habit?
7. How did Mandela accomplish “The Law of Influence”?
8. How did Mandela accomplish “The Law of Navigation”?
9. How did Mandela accomplish “The Law of Victory”?
10. The book *Credibility* talks about “Fostering Trust”. How was trust or lack of trust demonstrated in the movie?
11. What were the defining values or credo for Nelson Mandela? Discuss *Invictus* poem by Henley.
12. How did Mandela “sustain hope” as a leader?

Kentucky Connections

CONTRIBUTED BY DON BRATCHER, 2011 STATE LILI CHAIR AND MODERATOR 2007, 2008, 2010



Kentucky has hosted two successful alumni events. The first was a LILI roundtable breakout session held at the 2009 State Convention. The most recent alumni event was held before the Local Success Planning session in 2010. This was a time to “catch up” with former classmates and share how LILI has continued to help them in their personal lives and their practice. We had about 40% of previous graduates attend and everyone felt it was time well spent.

Maryland Mixer

PRESENTED BY CINDI SCAFIDE, 2011 STATE LILI CHAIR AND MODERATOR 2009, 2011



You are invited to a LILI Social sponsored by NAIFA-Maryland
At the home of NAIFA Trustee & LILI Alumni Paul Dougherty
February 16, 2011 - 6:00pm - 8:00pm
10704 Croom Road
Upper Marlboro, MD 20772
Beverages and heavy hors d'oeuvres will be served.
Come together with your fellow LILI alumni and join us in welcoming
our new LILI students for 2011.
RSVP by February 19th to:
NAIFA Maryland Executive Director Nancy Belardo at
877-394-9504 or angclamb@naifa.com
or Paul Dougherty at ad@longhervagency.com

The Maryland LILI alumni had a wonderful chance to reconnect at our first annual LILI reunion. We met on February 9, 2011 at the home of NAIFA trustee and 2005 LILI graduate, Paul Dougherty. Alumni enjoyed delicious food and drinks at Paul's historic home in Croom, Maryland. Members of the classes of 2005, 2006, 2007, and 2009 were on hand to welcome the newest LILI participants for the class of 2011. The Maryland LILI alumni group will increase by 8 members come August. All enjoyed lively conversations, shared memories, suggestions for good reading and revisited our favorite movies from LILI. We plan to make this event an annual one, offering us a chance to reconnect and strengthen our LILI bond AND welcome the next class of participants.

Michigan Alum Make LILI Work

PRESENTED BY ANGELA SHANNON, 2011 STATE LILI CHAIR AND MODERATOR 2007, 2008



Michigan holds an Alumni Reception every year at their State Convention. The reception is a special networking event for alumni and it creates a lot of interest among the general membership, which helps with student recruitment.

Michigan also reports that they rely heavily on alumni for student recruitment and they have been able to start their class every year in January without any problem. Michigan requires current students to name 3 potential students between classes 5 and 6. These names are passed on to the State LILI Chair prospect list. This has worked well for them.

Note: This referral process has been added to the LILI curriculum in Session 6 – “LILI Candidate Recruitment”.

Minnesota Insights

CONTRIBUTED BY BOB O'FALLON,
2011 STATE LILI CHAIR AND MODERATOR 2002-2011

Many years ago, as a high school teacher, I learned that EACH class has an individual personality which is made up of the individual people that make up that particular class. Because of this, I also realized there is no predetermined method which works for each class, but there are predetermined goals to reach. The principle problem is being able to react to each class in a manner that is flexible enough to reach the predetermined goal. Much like a parent has to react and treat each child differently even though the goal might be the same.



Our group of LILI Alumni is certainly a formidable collection of people! However, a “CLASS” is always going to be a “CLASS” with shared emotions and personal experiences. In Minnesota, we have attempted to work off of this class concept and help students to work together to determine what the next step is.

In Session Six, we have always set time aside to ask the questions: “What’s next?” “What are your plans as a class going to be?” There is not a right or wrong plan here.

It is our job to guide the process to the goal, not to determine how each class gets there.

We have to keep guiding with questions such as:

- What do you want to do?
- What do you want to accomplish?
- How will you go about this?
- How will you measure your accomplishments?
- Do you plan to continue to meet?
- How often do you want to meet?
- Where will you meet?
- Who will be the central contact person?

These questions can go on for as long as direction is needed, but in most cases, we have found the first question is all that is required. After that, the class takes off on its own planning process. After all – that is exactly what we just spent six months helping them to do.

- We have classes that do not meet very regularly.
- We have classes that meet annually.
- We have classes that meet as a party and overnight type meeting.
- We have classes that meet via e-mail.
- We have classes that review leadership books.
- We have classes that spend time reviewing and updating their business plans.

Each class has to set its own goal. Each class member has to be responsible to the other members of that class.

Missouri Making Memories

PRESENTED BY DEBBIE COULTER, LILI MODERATOR 2010, 2011

The Missouri Class of 2011 celebrated with family in Branson, MO. If you've never been to Branson, it's an experience. We stayed at the Clarion right on the 76 strip – a very nice hotel with lots of amenities.

We had our last class on Saturday in a meeting room at the Clarion and then enjoyed a late lunch and Graduation time with family right at the hotel. A few former graduates came to share in the celebration and spoke to the class. Our state LILI Chair, Amy Kern, and I handed out the framed certificates and a notebook to each student (our state secured its own source for certificate frames similar to those previously provided by NAIFA national).



Each student read their summary and shared their experience. The photo shown above is of Mark Acre and me. Mark is going to be Missouri's moderator for 2012. I'm so excited for him and for the next class. Michelle Drum made me a quilt with the LILI colors to remind me of the class.



Almost everyone stayed at the hotel and we were done early enough for many to drive back home on Saturday evening. A few couples stayed Saturday evening and we went to Branson Landing to socialize and shop (check it out at www.bransonlanding.com). It was a great continuance of bonding not only as a class but with family members as well. There is an amazing amount of shopping, fountains, entertainment, and nightlife right on the Landing and of course throughout Branson. We are seriously talking about holding future alumni reunions in Branson.

Nebraska Hosts Grad Reunion

CONTRIBUTED BY DOUGLAS PIKOP,
2011 STATE LILI CHAIR AND MODERATOR



The NAIFA-Nebraska LILI Class of 2011 (pictured below) celebrated commencement exercises on May 11, 2011 in conjunction with the first annual NAIFA-Nebraska LILI grad reunion. Last year, NAIFA-Nebraska leaders decided to start the 2011 LILI class in November so students could complete course requirements and have commencement the first evening of the NAIFA-Nebraska Joint Conference traditionally held in mid-May in Omaha. State Leaders also decided it would be fun to invite all previous LILI grads from across Nebraska to recognize the achievements of the newest LILI class and celebrate together.

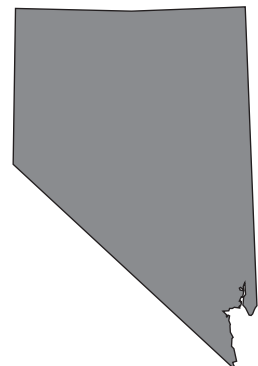


In all, over 40 people attended commencement including grads from every LILI class since 2006 when Nebraska held its first class. Those assembled were privileged to hear Terry Headley, NAIFA President, address the group, sharing his thoughts on leadership. Special guests included Dr. Susan Waters, NAIFA CEO, and NAIFA Trustee, Keith Gillies. Everyone who attended the dinner banquet agreed it was a wonderful success. A good time was had by all and plans are in the making to hold the second annual NAIFA-Nebraska LILI grad reunion in May 2012, with a goal of creating greater awareness of developing leaders through the LILI experience!

Nevada News

CONTRIBUTED BY MARILYN LEWIS, CLASS OF 2005

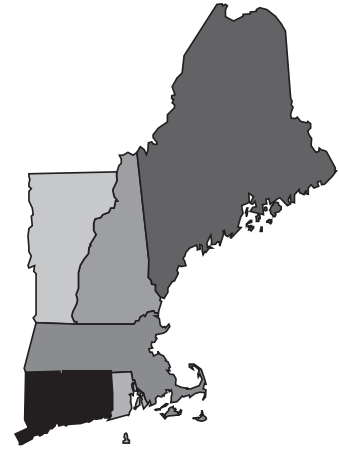
In Northern Nevada, we meet quarterly and pick a book to read and discuss at the meeting. We also spend some time helping each other solve problems within our businesses. The person in charge of the meeting sets the agenda. A different person is in charge of each meeting.



New England Forum Endeavors

CONTRIBUTED BY SUSAN MARTIN, LILI MODERATOR 2006, 2007, 2009
NATIONAL CHAIR OF LILI ALUMNI RELATIONS

If it's our one week of summer, it must be time for a lobster bake! For the past few years, one of our classes has selected a short book (*The Five Dysfunctions of a Team*, *The Fred Factor*, *How the Mighty Fall*) and a movie (*Akeelah and the Bee*, *12 Angry Men*) and we get together on the water for a lobster/steak bake. Our event tends to be informal with discussions on the book, movie, and lots of catch up. We also brief each other on any progress or substantial changes to our business plans.



CONTRIBUTED BY PATRICK KANE CLASS OF 2005 – NEW ENGLAND FORUM

Patrick's class graduated in 2005 and has kept in touch regularly since that time. The class has a conference call the first Friday of each month. During that call, the agenda includes: 1) catching up a little; 2) review what is happening with their goals; and 3) sharing ideas. This could be a sales idea or general discussions based on what's going on in everyone's lives.

The group also meets face-to-face twice a year: First, in the summer months for a few hours in a more relaxed setting – dinner or a barbeque and pool party are a couple that have been done – the topic of discussion is business plans. Then, around the holidays the group meets again for a day to help each other build or refine their business plans for the following year.

Patrick reports that it's not always easy to keep the group together, but it is a dynamic group that has become very close. They have seen each other through the good and bad, pushed each other, and been in each other's faces when needed, but they also get enormous enjoyment from each others' successes.

Vermont on the Ropes

CONTRIBUTED BY CARRIE GRIFFIN, CLASS OF 2010, LILI MODERATOR 2011



In search of a graduation event that would be worthy of our excellent LILI experience, LILI-Vermont Class of 2010 decided to veer from the norm. Our last class, special lunch and graduation ceremony were held at an exceptional location, a renowned resort and spa, which was geographically close to where our classes were previously held. Then, to top off the day, we all changed clothes and went to an outdoor challenge and leadership (how appropriate!) facility. This place works with several types of groups, from first graders to corporate teams, to enhance their team-building skills in a fun and supportive way. The “adventure” can be customized to the type of group participating; obviously the first graders would have an entirely different challenge than adult corporate executives, for example.

The first LILI-VT graduates opted for an adventure experience called “High on Life,” as, indeed, we were. This was a “High Adventure Challenge Course.” After getting geared up in our helmets and harnesses and clipping in our carabineers, we climbed a huge net 40 feet up to the first platform tower. It was much like boot-camp, we thought. Then, we clipped onto some thick cable wires to traverse the first beams – a challenge even for a gymnast when 40 feet up! Following the beams, there were hanging cross-beams that were connected by wire horizontally. If you can imagine, they were really wobbly! Our team figured out that if four people stepped at the same time, the simultaneous weight balanced out the beam and we were all able to get across to the next platform. The next challenge was a tight-rope crossing. And the last was the 400 foot long zip line to the finish. Our graduation group had a young man, aged in his early 20’s, up to a mature woman in her mid 60’s. The best



ON THE NET



ON THE RAILS

part was hearing the encouraging words and cheering for other people as well as comments made, like, “I can’t believe I just did that,” and “My husband will never believe what I did today.” This would be an excellent and unique experience for all; it really captures the essence of the LILI culture.

TIP: There are many “ropes courses” throughout the United States. If you Google ropes course, you will get over 1,000 hits.

New Mexico

SEE PAGES 5–7

North Carolina Networks

CONTRIBUTED BY KEN MORGAN, NORTH CAROLINA STATE EXECUTIVE, CLASS OF 2004



North Carolina holds an Alumni “Sharpen the Saw” event each year in conjunction with the class Graduation. A past graduate facilitates discussion on a pre-assigned book. Alumni preregister and are mailed a book to be read. The Alumni session is held in the morning and then they all join the Graduation Lunch with the new class. This is the sixth year we have held the alumni event. The books that have been used are as follows:

2011: *Even Eagles Need a Push* by David McNally and Mac Anderson

2010: *Kingdomality* by Sheldon Bowles

2009: *Ethics 101* by John Maxwell

2008: *The Fred Factor* by Mark Sanborn

2007: *Attitude 101* by John Maxwell

2006: *Who Moved My Cheese?* by Spencer Johnson

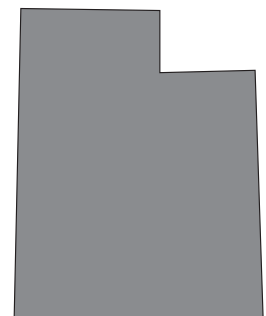
Texas: SEE PAGES 8-10



Utah Unites Grads

CONTRIBUTED BY KEN EVANS, LILI MODERATOR 2005-2009

Utah has made a “LILI 7” experience part of our State Convention for the past few years. The convention format is main platform speakers in the morning and breakouts in the afternoon. There are 3 different one-hour breakout sessions, starting at 2:00, 3:00, and 4:00 pm, and several different sessions are offered each hour. At 4:00 pm one of the breakouts is exclusively for LILI graduates. We pick a book and announce it months in advance to all of the LILI graduates and ask them to read it and to be prepared to discuss it.



For the previous year’s convention, we chose *Leadership and Self-Deception* from The Arbinger Institute. You can prepare supplemental materials and make a PowerPoint presentation to guide the discussion, or you can just moderate a discussion.

On another occasion, we handed out a WHY-BE-DO worksheet based on Lance Secretan’s 2009 LILI 7 presentation and had our graduates take a few minutes to write their responses and then discuss it. (1. Why am I here on earth? 2. How will I be while I am here? 3. What will I do and how will I use my talents and gifts to serve?). The main idea is to make it part of the State Convention and make it the last hour of the breakouts so it can go longer than an hour. Get the information out early. Make it exclusive to LILI graduates.

Vermont: SEE NEW ENGLAND STATES – PAGE 19

Wisconsin Working It!

CONTRIBUTED BY TAMMY CLARK, LILI MODERATOR 2011



The 2011 LILI class held their graduation ceremony at the end of their Session Six class. They kept it to just their intimate group with no outside guests invited. The group grew very close and has decided to stay together as a study group and meet at least two times a year to share sales ideas and track how they are performing according to the measures in their business plans. Two of the graduates are already talking about co-moderating next year and they have some interested candidates. Each person grew and they found their biggest value was writing their business plans (some for the very first time).



CONTRIBUTED BY NORA STRANSKY, LILI MODERATOR 2006, 2007. 2010 NATIONAL LILI SUBCOMMITTEE CHAIR

The 2010 LILI class held their graduation ceremony at the end of the state's annual meeting in conjunction with the Sales Congress. Having the graduation ceremony in conjunction with the annual meeting provides a showcase for LILI and allows more members to witness the ceremony. And hearing what LILI has meant to those graduating creates a buzz for the next year. The Wisconsin class needs to begin in December in order for graduation to coincide with the state Sales Congress. A lot of pre-planning has to happen in order for that to work.

On another occasion, one year when I moderated, LILI alumni and the graduating class had a very meaningful gathering. All past graduates were invited to get together at the country club where we were holding the graduation that evening. Two past grads picked a book to have invited alumni read in advance, and the alumni had their own mini LILI activity the day of the graduation where they discussed the book and followed up on where everyone was with their business plan.

The graduating class joined the alumni for cocktails and dinner, where they celebrated together. Significant others were asked to join the celebration along with state leadership. It was a very meaningful event and those in attendance were the ones who worked hard to recruit a class for the following year. Some of the significant others in attendance were even willing to share how the class had changed family life.

The new grads were immediately recognized as individuals who accepted the challenge and worked hard individually and collectively to achieve another milestone in their lives. Having the past grads there to support and acknowledge them made it very meaningful and, along with spouses, strengthened the bond of all grads within the state.





Read the book — This may seem obvious, but it is the most important step, so it is worth stating. It is a good idea to plan on finishing the book a little earlier than you might otherwise so that you have time to think about it and prepare before your Alumni Group meets to discuss it.

Tab important page numbers — If there are parts of the book that made an impact on you or that you think may come up in discussion, write down the page numbers so that you can access the passages easily while preparing and leading your discussion.

Come up with eight to ten questions about the book — When writing your own discussion questions, avoid questions that are too general, like “What did you think of the book?” Also avoid questions that have yes or no answers. You want to ask questions that are open-ended and help people talk about themes and how the book relates to deeper issues.

Let others answer first — When you are asking questions, facilitate the discussion; do not act as a teacher. By letting others answer first, you will promote conversation and help everyone feel like their opinions matter.

Remember, sometimes people may need to think before they answer. Part of being a good leader is being comfortable with silence. Don't feel like you have to jump in if no one answers immediately. If needed, clarify, expand or rephrase the question.

Do not make dismissive statements toward other people's comments. Even if you disagree, take the conversation back to the book rather than saying “That's ridiculous”, etc. Making people feel embarrassed or defensive is a sure way to shut down the conversation.

Make connections between comments — If someone gives an answer to question 2 that connects well with question 5, don't feel obligated to ask questions 3 and 4 before moving to 5. Even if you go in order, try to bridge an answer and the next question. By connecting people's comments to the questions, you'll help build momentum in the conversation.

Occasionally direct questions toward quiet people — You don't want to put anyone on the spot, but you do want everyone to know their opinions are valued. If you have a few talkative people who always jump right in, directing a question to a specific person may help draw out the quieter people.

Rein in tangents and side conversations — A little off topic conversation is fine, but you also want to respect the fact that people have read the book and expect to talk about it. As the facilitator, it is your job to recognize tangents, corral side conversations, and bring the discussion back to the book.

Don't feel obligated to get through all the questions — The best questions sometimes lead to intense conversations. That's a good thing! Questions should be there as a guide.

Wrap up the discussion — One good way to wrap up a conversation and help people summarize their opinions of the book is to ask each person to rate the book on a scale of one to five.

Parts of this outline created by Erin Collazo Miller



NAIFA Leadership in Life Institute (LILI)

Your LILI Colleagues Recommend...

It's Your Ship by D. Michael Abrashoff

How the Mighty Fall by Jim Collins

Inspire! What Great Leaders Do by Lance Secretan

The 8th Habit by Stephen R. Covey

The Speed of Trust by Stephen M.R. Covey

Made to Stick by Dan Heath & Chip Heath

Leadership on the Line by Ronald A. Heifetz & Marty Linsky

True North: Discover Your Authentic Leadership

by Bill W. George & Peter Sins

The Fred Factor by Mark Sanborn

The Five Dysfunctions of a Team by Patrick Lencioni

Hedgehogs and Foxes: Character, Leadership, and Command in Organizations by Abraham Zaleznik

Beyond Authority by Julia Middleton

People and Performance: The Best of Peter Drucker on Management by Peter Drucker

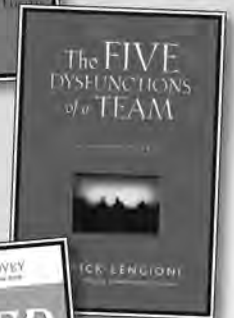
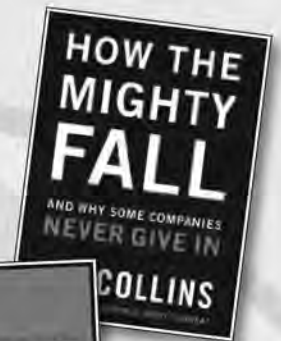
Execution: The Discipline of Getting Things Done

by Ram Charan, Larry Bossidy & Charles Burck

Bad Leadership by Barbara Kellerman

Good to Great for the Social Sector by Jim Collins

The Radical Leap by Steve Farber



Visit us at www.naifa.org/lili for updates.

NAIFA Leadership in Life Institute (LILI) Movie Recommendations...



The Blind Side (PG-13)

Ultimate Gift (PG)

Facing the Giants (PG)

IKE (PG)

The Court Martial of Billy Mitchell (not rated)

Life is Beautiful (PG-13)

Norma Rae (PG)

We are Marshall (PG)

Pay it Forward (PG-13)

Bucket List (PG-13)

Fried Green Tomatoes (PG-13)

The Greatest Game Ever Played (PG)

Dead Poets Society (PG)

Grid Iron Gang (PG-13)

Forever Strong (PG-13)

Glory Road (PG)

The Bridge Over the River Kwai (PG)

Roosevelt at Warm Springs (difficult to find)





Many states coordinate their alumni events with their State Convention. You could also plan your alumni event in conjunction with the opportunities available at the national NAIFA Career Conference and Annual Meeting or you can utilize ongoing resources that are offered by national.

LILI Events at the NAIFA Career Conference and Annual Meeting

- **LILI 7 Leadership Workshop:** The LILI journey and your personal quest for growth do not end when you complete the six-month course. The “journey” is an ongoing process and LILI 7 is designed to give alumni continued opportunities to develop. One of the fastest growing and most popular events at the NAIFA Conference, this unique workshop features first-class speakers who present cutting-edge leadership concepts. It is the perfect opportunity for you to revisit LILI principles and “sharpen the saw”.
- **LILI Alumni Networks:** Reserved exclusively for alumni, this informal networking session at the NAIFA Conference unites graduates from across the federation in a common spirit. Tap into the combined knowledge of your colleagues, renew old friendships and build new ones at this event designed to stimulate, inspire and strengthen the bonds connecting the LILI family.
- **First Timers Orientation:** This special event is hosted by LILI and designed to help first time attendees maximize their conference experience. An outstanding NAIFA leader is keynote speaker and alumni serve as table moderators.
- **LILI Expo Booth:** Meet, greet and grow at the LILI Expo Booth! Alumni serve as hosts to educate visitors about the many benefits of LILI. The booth offers a unique opportunity for graduates to network with each other and to share their LILI story with other NAIFA members.



NAIFA CAREER CONFERENCE & ANNUAL MEETING SEPTEMBER 10-14
PROFESSIONAL DEVELOPMENT ★ NETWORKING ★ GOVERNMENT RELATIONS & POLITICAL ACTION

- **LILI Web Page:** Visit www.naifa.org/lili and click on the History & Alumni page. Links to The LILI Alumni Playbook and other resources are posted there.
- **LILI on Facebook:**
 - **LILI Alumni Networks on Facebook:** Get connected! This exclusive online networking opportunity gives grads an easy way to connect with each other and continue their journey. Grads can ask questions, share photos and videos, and keep up to date on LILI events. This is a private group and members must be LILI graduates to join. Graduates must request to join and be approved by the NAIFA administrator. If you are not yet on Facebook, please go to www.facebook.com and sign up. Once you have created an account, go to www.facebook.com/groups/lilialumni and request to join LILI Alumni Networks.
 - **LILI Fan Page on Facebook:** A second LILI page can be accessed and “Liked” by the general public. Designed primarily to promote the six-month course, this page has drawn many graduates who visit to become “Fans”, to view graduating class photos, or to write on the “wall” about what LILI has meant to them. Visit www.Facebook.com/NAIFALILI and join the conversation!
- **LILI Leaders & Alumni News:** Bi-monthly e-newsletter designed to connect LILI Alumni and NAIFA leadership, keeping graduates informed about new programming, curriculum development and LILI events. Special features include recommended readings and movies, leadership stories, and alumni networking and service opportunities.
- **NAIFA Online Leaders Training Center (OLTC):** Did you know that the OLTC provides an online library of tools and resources for state LILI leaders? The purpose of the center is to equip state LILI teams with the tools to succeed at every stage of planning and hosting the Institute – from promoting the course to celebrating at commencement. The LILI online library includes an Alumni Relations section with tools that can be leveraged for your alumni events such as:
 -  The LILI Alumni logo
 -  Recommended reading and movies flyer
 - Publicity flyers on events hosted by national
- **NAIFA Marketplace:** Successful LILI states have an alumni team in place whose responsibility year round is to promote the core course and help with student recruitment. Graduates are the best equipped to tell the LILI story and promote the course at state and local meetings. Visit the NAIFA Marketplace to order promotional materials www.naifamarketplace.com and grow your alumni group!





As a LILI graduate, there are many exciting and rewarding leadership opportunities available to you!

LILI Moderator

One of the most gratifying experiences is to serve as a LILI moderator for your state's class. Visit www.naifa.org/lili to learn more. Please direct inquiries to lili@naifa.org.

"TO SEE INDIVIDUALS MATURE AND GROW INTO LEADERS RIGHT BEFORE YOUR EYES CAN BE A VERY MOVING EXPERIENCE. FOR ME, ONE OF THE GREAT PARTS OF LILI IS TO LOOK AT MY CLASSMATES AND BE ABLE TO CALL THEM TRUE FRIENDS, NOW AND IN THE FUTURE."

— *Robert G. O'Fallon, CLU, ChFC, CFP, CFS*
NAIFA-Minnesota LILI Moderator 2002-2011

State LILI Chair

You can impact the lives of others and help bring strong leadership to your local and state associations by serving as your State LILI Chair. As the key contact for the program in your state, the State LILI Chair works in harmony with the State Executive and moderator to provide oversight of activities related to the administration, promotion and continuation of the LILI program. This person should be passionate about the program and agree to hold the position for two years.

State LILI Committee

A strong state LILI committee is the key to LILI's overall success. This team should be made up of state leaders and LILI alumni. Critical tasks such as the selection of the moderator and students are the responsibility of this team. This committee should also assist in marketing and recruitment initiatives. States should have a team of LILI graduates whose responsibility year round is recruiting potential students. **Together Everyone Achieves More.**

State Alumni Committee

Does your state have an Alumni Group? If not, would you be interested in building one? If you would like to serve on a task force to help build an Alumni Group in your state, let your state leaders know. You may also contact a member of the LILI subcommittee for assistance. Visit www.naifa.org/lili for LILI subcommittee contact information.

National LILI Subcommittee

If you are passionate about LILI and would like to serve on the national LILI subcommittee, please notify your state national committee person and state executive. Candidates for all national committees must be reported by the state and are appointed by the NAIFA Executive Committee.

Note: This roster includes all graduates as of December 31, 2010 grouped by the state in which they reside. All graduates regardless of NAIFA member status are included and deceased graduates are presented at the end. The Class of 2011 was still in process when the Playbook was printed. 2011 graduates and students will be recognized at the 2011 NAIFA Career Conference and graduates will be added to the online LILI Graduate Roster posted at www.naifa.org/lili.

ALABAMA – 13

Timothy J. Barron
Mark W. Brittain, LUTCF
Martha A. Burchell
Barbara Cochran Cantrell,
LUTCF
Booker Joseph, CLU, ChFC,
FLMI
William Orié Knowlton, III, CSA
Edward Rose, LUTCF
Tia Smallwood
Linda V. Stoudemire, LUTCF
William S. Townsend
Gregory D. Turner, LUTCF
Roy H. Williams, Jr., LUTCF
Kerry L. Wilson, LUTCF

ALASKA – 32

Gary C. Annis, CLU, ChFC,
LUTCF
Kristie D. Babcock
Allen O. Bowler, Jr., LUTCF
Linda S. Brandon
Lorne D. Bretz, CFP, ChFC
Jesse Dewar
Curtis G. Green, Jr., CLU
Malia L. Hayward
Andrew J. Hepola
Ellen D. Hermann, LUTCF, CLU,
ChFC
Katherine E. Hood
Todd D. Jackson, CLU, CASL,
ChFC
Eric J. Johnson, RHU
Kent S. Kallander
Robin M. Lonas
Beverly S. Lukehart, CLU, ChFC
Justin McDermott
W. Robert McVitty, Jr., LUTCF
Stanley R. Miller, LUTCF
Richard K. Mohammadi
Johanna Margaret-Mary Raisch,
AIAA, ACS
Jennifer D. Rice
Mark A. Rich
Stacey A. Roy, AIC
Lisa E. Sanders
Timothy P. Shilanski
Therese R. Solli
David L. Stratton, CLU, ChFC,
CASL
Marilyn K. Tirador
Thomas A. Turner, CLU
Nancy Valdez
Windy Ann Wolf

ARIZONA – 50

Michael Abbate
Judy P. Aguilar-Woertz, LUTCF,
ChFC, CFP
Jim Bennett, LUTCF
Maryglenn K. Boals, CLTC
Diana Brettrager, CIC, FSS
James F. Brown, Jr.
Robert A. Bryant, Sr., LUTCF
Bradley B. Burr, CFP
Jeffrey Donald Carter, RFC, CSA,
LUTCF
Robert T. Castellani, LUTCF
Barry A. Cook, CLU, ChFC
Hank J. Dallago, LUTCF
Haydee Dawson
Allen G. Ekman, CLU, LUTCF
Nina Falls
Dianne T. Fay, ChFC, CFP,
LUTCF
Carmen T. Green
Lars David Hansen, LUTCF
Robert T. Hickman
Stacey Himes-D'Antonio, LUTCF
Clinton E. Jensen, LUTCF
Tracy L. Jones
Ken R. Keslar
Michael P. Klein, CFP, MBA
David Richard Kroll, CLU, ChFC,
LUTCF
Michael E. Markham
Douglas H. McMurry, LUTCF
Daniel R. Miller
Daniel A. Montoya, LUTCF
Amy L. Navarro
Joe P. Nix, LUTCF
Julianna L. Quain, CLTC
Mindy S. Reyes, LUTCF
Susan Barbour Riedel, FIC
Dennis C. Sand, CLU, ChFC,
LUTCF
Michael A. Sandoval, CLU, ChFC
Alan Sapakie
Chad P. Schneider
David Maurice Schuman, CLU,
LUTCF
Cullum L. Smith
Jonathan A. Smith, CSA
Philip L. Solinsky, LUTCF
Matthew J. Steger, LUTCF, FSS
Diana S. Strahl
Ray E. Strahl
D. Winston Vineyard, LUTCF
Becky Belle Wagner
Joseph A. Weber, CFS, CSA

Cliff F. Wilson, CLU, ChFC,
LUTCF
Kenny Ziegler, LUTCF

ARKANSAS – 34

Kenny Ray Allen
Mark G. Baber, LUTCF, CLU
Stuart G. Baber
Robert Balentine, CLU, ChFC,
LUTCF
George W. Booker, II, LUTCF
Gina M. Cromwell, ARPC
H. Keith de Noble, LUTCF, CLU
Brenda D. Doty, LUTCF, RHU,
CLU
Raymond Blake Duncan, LUTCF
Dianna S. Freeman
Joey Fulgham, LUTCF, FSS
Paul L. Graham
Jeffery L. Handly, LUTCF
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 Kimball R. Doxey, LUTCF
 David A. Dunn, LUTCF
 Wayne Miles Eckman, LUTCF
 Michael L. Elder
 Kenneth R. Evans, CLU, ChFC, CFP
 R. Terry Fullmer, CLU, ChFC, LUTCF
 Brian S. Hanby, CSA, CLTC
 John W. Homer, CLU, ChFC
 Robert Dan Jenkins, LUTCF
 Darren J. Johansen, LUTCF
 Scott Johnson, LUTCF, CFP, CLU
 Aaron D. Kidd, LUTCF, CLU, ChFC
 Charlene Ann Long, CLU, LUTCF, CASL
 Roger M. McQueen, CLU
 Holly H. Milne
 Dallas H. Neal, LUTCF
 Gregory G. Nelson, ChFC
 Rick E. Nelson, CLU, LUTCF, ChFC
 Ronald D. Nielsen, CLU, ChFC
 Wes Patterson
 Dori A. Phillips
 Marvin R Reynolds, ChFC, LUTCF
 Wes H. Snell, CLU, ChFC, LUTCF
 Charles E. Sorensen II
 Rick B. Stanzione
 James M. Stasinus
 J. Michael Stevens, CLU, ChFC
 Douglas W. Stewart
 T. Brent Thomason, LUTCF
 Victoria Tuua
 Brian S. Walker, CLU, ChFC, CFP
 J. Bryan Washburn
 S. Mark Weeks, LUTCF, CLU, CSA
 Vince Wilkes
 Nicola A. Young, LUTCF

LILI GRADATE ROSTER 200-2010

BY STATE OF RESIDENCE

VERMONT – 9

Carrie M. Griffin, LUTCF, MA
Helen S. Hossley
Wendy L. Jestings, CLTC
Nathan A. Muehl, LUTCF
Patricia A. Nowak, CLU, ChFC,
LUTCF
Dana Polakowski
Max J. Rooney
Edmond G. Rouse, LUTCF
Susan W. Sweetser, CLU, ChFC,
JD, CFP

VIRGINIA – 40

Jean Barr
James R. Bertine, FIC, LUTCF,
CLTC
Jonas L. Borntrager, LUTCF
William H. Brown, III
Michael Patrick Burns, ChFC,
CLU, CFP
Marcus Emory Christian
John H. Corderman
Charles H. Craddock, Jr.,
LUTCF, AAI
Jonathan T Dean, CLU
Carroll I. Fuller, LUTCF
Gerald A. Funkhouser, LUTCF
Michael S. Geter
Harry C. Gill, LUTCF
Stephen Lloyd Good, LUTCF
Angie D. Hart, LUTCF, CLTC,
AFIS
Daniel L. Howard, CLU
William V. Johnson
Brock T. Jolly, CFP, CLTC, CLU
Cecil Wayne Lucy, LUTCF
John A. Martin, LUTCF, FSS
Derek C. Mason, LUTCF
Marie T. Mercer, LUTCF
Robert E. Mitchell, LUTCF
Fateen I. Moussa
Elizabeth A. O'Reilly
Steven H. Overly, LUTCF

Barton C. Pasco, CLU, ChFC,
LUTCF
Louis M. Petersen, LUTCF
Darrell K. Ritchie, LUTCF
Pamela Y. Roberts
Willis A. Roberts, Jr.
Harry S. Rosnick, LUTCF
Paul A. Scott, LUTCF
Dale Shaffer
Lawrence W. Stimpson, Jr.,
LUTCF
David R. Taylor, Sr., CIC, CISR
G. Jane Thornhill, LUTCF, CLU
Charles A. Webb
Robert E. West, LUTCF
William T. Whitmore, Jr.,
LUTCF, FSS

WASHINGTON - 39

Bradley K. Allen, CFP
Sil L. Arata, Jr., LUTCF
David M. Bailey, FICF, CSA, AAI
Maurice E. Baxter
Randy W. Best
Brian T. Campbell
Marikay Coyer
Scott R. Fowler
Thomas E. Fowler, CLU, LUTCF
Ryan M. Gamaunt, LUTCF, FSS
Jeffery J. Johnston, CLU
Robert M. Kelly
Laurie J. Kirkland, RHU
Neal A. Kloke
David L. Knode
Terri L. Kutrowski
Jeffrey M. Kyle, LUTCF, CSA,
LTCP
Wayne Lunday, LUTCF, CLU,
ChFC
M. Kay Mielke-Crookshanks,
CSA
Richard L. Miller
James E. Mitchell, CTP, LUTCF
John B. Nichols, CSA

Peter E. Pearce
Joseph A. Peterson
Ronald G. Rodgers, LUTCF
Mark Rogers, CLTC
Nora Saldana, LUTCF, CIC,
CPIW
Wesley Michael Shockley
Ron Sidwell
Bob Smith, LUTCF
Sharon L. Sparling, CIC
Michael C. Staeb
James W. Thompson
Bhaj Townsend, CLU, ChFC,
CFP
Paul D. Twedt, CLU, ChFC
Dean E. Van Donge, LUTCF,
BCE, CTS
Ralph E. Van Winkle, LUTCF
Randy J. Wesselius
Boyd Lee Williams, CLU, ChFC,
LUTCF

WEST VIRGINIA – 1

Terry S. Mathias

WISCONSIN - 50

Susan Jane Allen, LUTCF
Matt J. Anderson
Gregory A. Bailey, FSS
Cynthia L. Bong, CLTC, LUTCF
Tammy L. Clark, LUTCF
Margo Colvin
Jeffrey P. Diehl, CFP
Richard J. Eisenmann, CLU,
LUTCF, RFC
Daniel J. Flores, LUTCF
Linda Francetic Lepe, CFP
Justin Gauvin
Larry D. Goebel
Rebecca J. Gonzalez, CLU, FICF
Wayne E. Hagen
Jay D. Hinkens, CFP
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Michael A. Howell, LUTCF, FSS

Michael Stephen Immel, LUTCF
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Randall J. Meyer
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Martin F. O'Brien, LUTCF
Mary Kay Orr, LUTCF
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ChFC
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Elizabeth Ann Pollock, MBA,
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Kenneth E. Schwab, LUTCF
Michael T. Smith, LUTCF
Nora K. Stransky, CIC, CPIW
Elwood B. Syverson, LUTCF
Jennifer C. Szczytko, FICF
Roberta E. Tessoroff
Dale R. Thompson
Bernard G. Van Eperen
Bryan B. Waldo

WYOMING – 3

Richard D Childers
Larry G. Hutchison, CLU,
LUTCF
Mark L. Wagner

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Ronald D. Alexander
Eugene N. Becker, LUTCF
Twayne O. Buhler
Sean L. Deal, LUTCF
Kelly A. Denis-Pierce

Michael E. Fife, CLU, ChFC
Paul D. Hillestad, LUTCF
A. Clint Jaworsky, RHU, REBC
Charles E. Jenkins, LUTCF
Randolph C. Osvath, CLU, LUTCF

David F. Reilly, CFP, LUTCF, FIC
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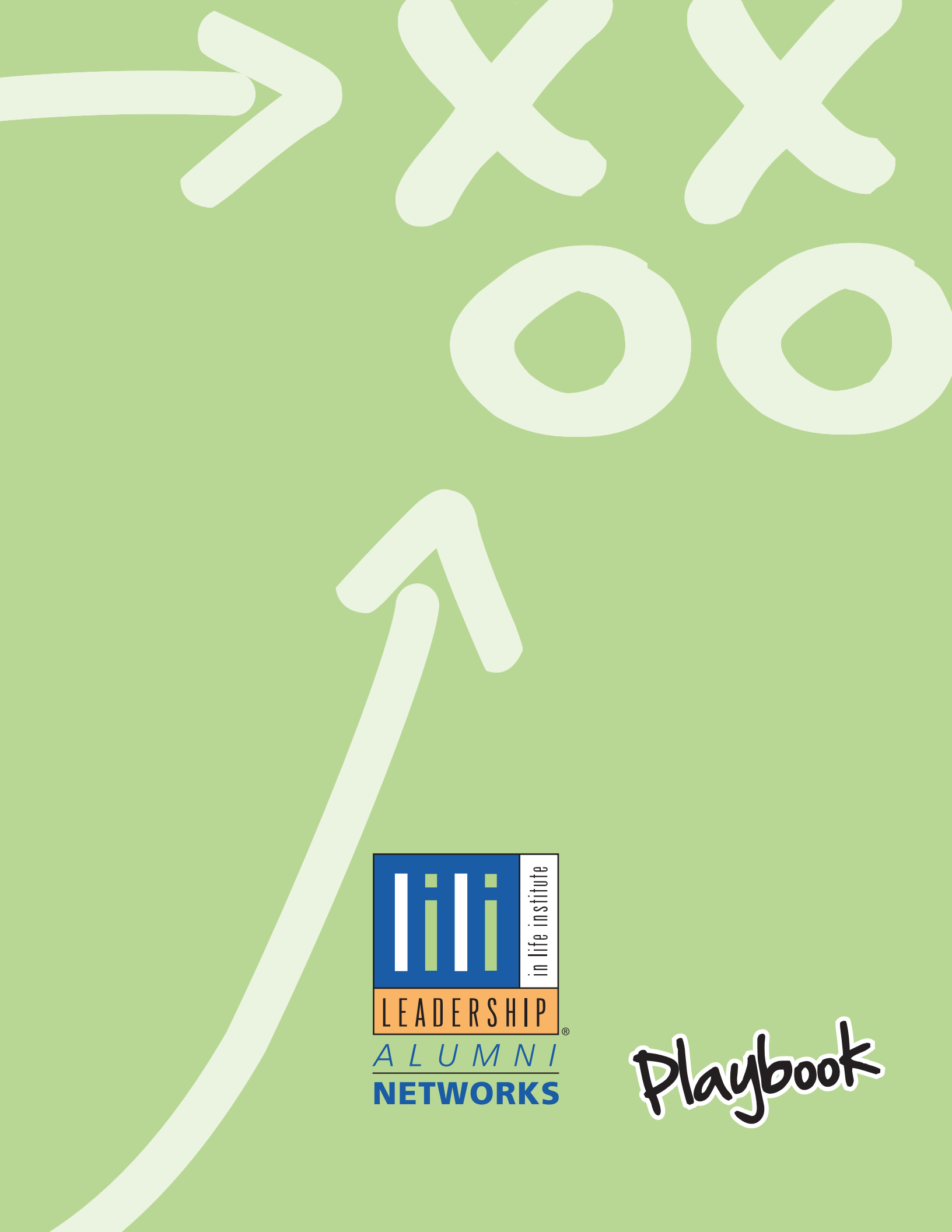
— Cammie K. Scott, LUTCF, REBC, RHU
NAIFA-Northwest Arkansas
2010-2011 National LILI Subcommittee Chair

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Playbook