

APRIL 2011



# THE IBA SFV CONNECTION



*INSURANCE BROKERS AND AGENTS OF THE SAN FERNANDO*

## Calendar of Events **2011**

### APRIL

13/15—National Legislative  
Conference

### MAY

02 - Executive Board Meeting  
04 - Board of Directors Meeting  
05- Golf Day @ Moorpark CC  
08 - Mother's Day

### JUNE

01 - Charitable Application Due  
06 - Executive Board Meeting  
08 - Board of Directors Meeting  
09/11 YBAC / Napa Valley  
19 - Father's Day

### JULY

04 - Fourth of July Holiday  
11 - Executive Board Meeting  
13 - Board of Directors Meeting  
14 - Casino Night / Joint with our  
sister association IBA-BGP

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[WWW.IBASFV.ORG](http://WWW.IBASFV.ORG)

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## PRESIDENT'S MESSAGE - ERIC ROTHMAN

It has been a very quick 2011 and the months are moving at a quick pace. We recently had our annual I-Day and we were so excited to see the fabulous turnout from everyone. The day has allowed everyone to start, and continue, relationships that enforce how strong our industry is. To those sponsors reading this we would once again like to say **THANK YOU**. Without your help and support none of our events would be as successful as they now are. The IBA SFV is looking forward to our annual Golf Day on May 5 (Cinco de Mayo)! We also have the annual casino night coming up, and many other fun functions.

We are sitting here on the eve of the first government shutdown in the 21<sup>st</sup> century. We are trying to understand why Republican's and Democrat's cannot just get along and agree on the issues that it takes to run this great country. How will this affect the country when we are currently in such a fragile state? Will this affect the insurance industry? How will this affect our private lives?

The IBA-SFV will attend the IIABA National Legislative Conference this week in Washington D.C. The question that everyone has on their minds

is will there be a government to visit this week? Perhaps the senators and congressmen know that the insurance industry is going to take Capitol Hill by storm and just want to get out before we show up. We have been guaranteed that the convention is still on even if there is a government shut-down. We are hoping to get our message across to our lawmakers about a number of topics including: Flood Insurance extension & reform, Insurance Regulatory Reform, Agent Licensing Reform, Health Care Reform, Federal Crop Insurance and Taxes. As your association's representatives, we strive to convey your views to your elected officials. Once again, that is if they are there. This will be my third year going to Washington D.C. and it is set to be an exciting one with a

number of different congressmen and women and a variety of topics to discuss.

Finally, on a personal note, I would like to thank all current and past IBA SFV board members that have continued their hard work and dedication to our association.

We are by far one of the most active, enthusiastic, and dedicated boards in the IBA West. This shows at a local level with our events and also on a state level. Without your help the association and the industry relationships we have built could not flourish.

Oh...and of course

**GO LAKERS!**



## PRESIDENT ELECT—GINA WILLARD

This year has already started out with amazing changes for me professionally since I accepted the position of President Elect for 2011. Your IBA - SFV Board has been off and running for 2011! In February we hosted our first Young Agent Event, which I co-chaired with Darren Hasson, held at Yankee Doodles, in West Hills. Along with great attendance and participation we hosted a trivia contest. For those who did not attend you can only imagine the magnitude of invaluable, useless, worthless information by individuals of above average intelligence competing for free prizes. Is there any question as to why alcohol is served at these venues? Lol....

March was the month for I-Day. With record attendance and sold out exhibitor booths there were well over 350 attendees walking the floor. Lots and lots of "insurance goodies" were provided by the vendors. Entertainment was provided by Captain Jack Sparrow at one of our vendor booths and the cocktail reception upon closing of the event. Thank you to all who attended and participated at one of the best I-Day's ever!!

The legislative conference will be held in Washington, D.C. for April, our IBASFV Golf Tournament will be held in the month of May. Young Agent Conference will be held in Napa in June, Casino Night will be jointly hosted by SFV and BGP in July. We will host a SuperMixer in August, Community Gala will be held in the fall, and yet another fine Young Agent Event in October. We will wrap the year with Company Appreciation in November and Officer Elections in December in 2012. I'm thinking you might find a drink at some of these events..."I'm just sayin", hope you to see you there!!

### BOARD OF DIRECTOR: MICHELLE JACKSON

On March 15<sup>th</sup>, I attended the IBA West Annual Political Summit in Sacramento representing Brokers and Agents of the San Fernando Valley. I was fortunate enough to have the opportunity to speak with several State Legislators and represent our industry in an extremely positive light. Of course the topic of the day is getting our state budget in order, however they were all appreciative of the time we were taking to inform them on several issues related to our industry, and to offer our expertise should they ever have questions about insurance related legislation.

Having brokers and agents from all areas represent our industry in Sacramento is critical and will help ensure that unfavorable legislation does not pass in our state capital. Next is the Big "I" Annual Legislative Conference in Washington D.C. For several days, myself and others from the IBA-SFV Board will volunteer our time to travel to Washington and discuss our industry issues with our elected officials in Congress. The power and influence our national government has over legislation that effects our industry is well known, which is why it is paramount that we have representatives there supporting our interests. This will be my first trip to D.C with IBA—SFV, and as the Political Chair for the San Fernando Valley, I am anticipating a valuable and extraordinary experience that I look forward to sharing with you in the next newsletter!

If you have any further questions about Sacramento, D.C., or anything related to your local IBA-SFV involvement in lobbying or government relations, please feel free to contact me.

mjackson@boltonco.com

## **JONATHAN SCHRETER—IMMEDIATE PAST PRESIDENT**

### **2011 Community Gala**

This fall, the IBA San Fernando Valley will host a charity event for a deserving non-profit organization that provides service to our local community. Our goal is to raise a minimum of \$5,000 for the organization, while also giving it added exposure to member agencies, utilizing our association's manpower and resources.

Which non-profit, you may ask? Well, that will be up to you.

In the pages of this bulletin, you will find an application that will allow your favorite local charity the opportunity to be considered for this event. Please take a moment to complete the brief set of questions and return them as instructed.

All submissions must be received by June 1, 2011 for consideration.

Previous years, we have hosted a dinner and a bowling event. The structure and timing of this year's event will be determined through a cooperative effort between the charity, our association and you and your agency.

Thank you in advance for your consideration and participation.

### **BOARD OF DIRECTOR: BRETT BOSSUK**

The InVest program is one that will be very important for the future of the insurance industry. Now is the time to show young professionals what the insurance industry has to offer from a job standpoint. Insurance is always overlooked for various reasons, but a closer look shows unlimited opportunity.

Not to bring up competitors, but Farmers is currently running an ad campaign for University of Farmers showing how their agents are educated on insurance. With large marketing budgets, it would be hard to compete on an advertising level, but Independent Agents can show local colleges what insurance has to offer. Next month InVest will be speaking to a group of finance students from CSUN about the great opportunity insurance jobs can offer versus some of the more glorified jobs such as wealth managers or financial advisors.

InVest has a solid foot print on the east coast and I believe it can have the same results on the west coast. It is up to us, the agents, to promote our industry and show everyone the amazing and limitless opportunities the insurance industry has to offer.



IBA SAN FERNANDO VALLEY  
INDEPENDENT INSURANCE  
BROKERS AND AGENTS ASSOCIATION  
P.O. Box 7365, Mission Hills CA 91346  
Phone 818-994-7455/Fax 818-994-4919  
[ibasfv@roadrunner.com](mailto:ibasfv@roadrunner.com)

The IBA San Fernando Valley will be hosting a charity event in the Fall, 2011. 100% of the proceeds from this event will be going to one pre-selected charity. Our goal is to raise a minimum of \$5,000 during this event. To be considered for this grant, please complete this application and return it by the **June 1, 2011** deadline

**CRITERIA AND APPLICATION**  
**CHARITABLE ORGANIZATION DONATION**

Name of Sponsoring Agency: \_\_\_\_\_

Name of Broker / Agent: \_\_\_\_\_

Telephone: \_\_\_\_\_ email: \_\_\_\_\_

Name of Requesting Organization:  
\_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_ website: \_\_\_\_\_

Hours of Operation: \_\_\_\_\_ Tax ID #: \_\_\_\_\_

**To qualify, applicants must satisfy the following criteria:**

Must be an established Charitable Organization (please provide 501C # above).

Must communicate how the San Fernando Valley community benefits from your organization.

Must be prepared to offer IBA **significant** support in promoting the event including, but not limited to written correspondence and the use of mailing lists, publications and newsletters of your organization

## QUESTIONS:

1. What is the mission of your organization? Please emphasize how your organization benefits the San Fernando Valley.
2. When was your organization established?
3. What is your annual operating budget?
4. What are your sources of funding?
5. How would proceeds from the IBA San Fernando Valley's Charity Event be used within your organization?
6. How many constituents does your organization serve?
7. This event will require the joint participation between your organization and IBA San Fernando Valley. Please detail how you will partner with IBA San Fernando Valley to promote and ensure a successful event?

Please be reminded this application and questionnaire **MUST** be received by the IBA San Fernando Valley Association on or before **June 1<sup>st</sup> 2011** to be considered for the 2011 Grant.

Applications can be e-mailed to [ibasfv@roadrunner.com](mailto:ibasfv@roadrunner.com) or sent via regular mail.

### DISCLAIMER:

Additional Information, such as a current financial statement could be requested as part of the review process.



## *GOLF DAY SPONSORSHIP OPPORUNITIES*

PLATINUM SPONSOR	\$3,500
GOLD SPONSOR	\$3,000
SILVER SPONSOR	\$2,500
BRONZE SPONSOR	\$2,000
CLUB HOUSE BBQ LUNCH	\$1,000
LONG DRIVE CHAMPION HOLE	\$750
19TH HOLE	\$750
FRONT 9 / BEVERAGE CART (2)	\$650
BACK 9 / BEVERAGE CART (2)	\$650
CONTINENTAL BREAKFAST	\$500
DRIVING RANGE	\$500
PUTTING CONTEST	\$500
CHIPPING CONTEST	\$500
LONGEST DRIVE CONTEST / MEN	\$500
LONGEST DRIVE CONTEST / WOMAN	\$500
CLOSEST TO THE PIN CONTEST / FRONT 9	\$500
CLOSEST TO THE PIN CONTEST / BACK 9	\$500
CLOSEST TO THE PIN PAR 4 / SECOND SHOT	\$500
MARGARITA SPONSOR	\$500
TEE BOX	\$250



## GOLF DAY 2011 ENTRY FORM

NOTE DATE CHANGE:  
THURSDAY MAY 5, 2011

MOORPARK COUNTRY CLUB  
11800 CHAMPIONSHIP DRIVE  
MOORPARK, CA 93021  
(805) 532-2834  
WWW.MOORPARKCOUNTRYCLUB.COM

TOURNAMENT ENTRANCE FEES  
SINGLE PLAYER ENTRANCE FEE: \$ 195.00  
FOURSOME ENTRANCE FEE: \$ 680 ( A \$100 SAVINGS)

ENTRIES DUE BY APRIL 27TH

1. \_\_\_\_\_ Co \_\_\_\_\_
2. \_\_\_\_\_ Co \_\_\_\_\_
3. \_\_\_\_\_ Co \_\_\_\_\_
4. \_\_\_\_\_ Co \_\_\_\_\_

### PAIRINGS INFORMATION

ALL PLAYERS LISTED ON THE SAME ENTRY FORM WILL BE PAIRED TOGETHER AND CONSIDERED A TEAM. ENTRIES RECEIVED WITH LESS THAN 4 PLAYERS WILL HAVE THEIR TEAM COMPLETED BY RANDOM SELECTION, UNLESS OTHERWISE NOTIFIED. FIELD IS LIMITED TO THE FIRST 144 PLAYERS.

PLEASE MAIL PAYMENT TO:

IBA-SFV  
P.O. Box 7365  
Mission Hills, Ca 91346  
(818) 994-7455

Questions? Contact Terry Miller @ (818) 534-3560

## BOARD OF DIRECTOR: FRED WESTON

On Sunday April 10th myself along with my wife and 2 boys, Board Member Janice Wendt and Executive Director Marian Jocz, we participated in the annual Ronald McDonald House "Walk for Kids" 5K walk. It was a crisp sunny cool morning at Exposition Park and with over a thousand plus all ready to walk for the cause. The atmosphere was festive with walkers in costume, loud music and of course Ronald McDonald present. The event will benefit the following houses: Los Angeles Ronald McDonald, Orange County Ronald McDonald, Loma Linda Ronald McDonald, Pasadena Ronald McDonald, Bakersfield Ronald McDonald, Long Beach Ronald McDonald and Camp Ronald McDonald.



This event raised over 1 million dollars, in today's economy that really says something good.

Maybe next year you can join us, it feels great.



P.O. Box 7365  
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[www.ibasfv.org](http://www.ibasfv.org)

