

Cultivate *Your Career*
Grow Your Legacy



75th anniversary
WIFS
WOMEN IN INSURANCE & FINANCIAL SERVICES
— 1936 to 2011 —

2011 National Conference
& 75th Anniversary Celebration

October 20-22, 2011

Hilton Portland & Executive Tower
Portland, Oregon

www.wifsnational.org



Our History

The first recorded women's organization within the insurance industry was the Women Leaders Round Table, founded in 1936 with its membership based solely on production.

Cultivate Your Career, Grow Your Legacy.

In this industry, relationships matter. One of the best parts of the WIFS National Conference is the vibrant community of women ready and eager to talk about their careers – the challenges they face, the successes they've had, the resources they use, and the support they've found. Don't miss this unique opportunity to share ideas, experiences, and best practices with financial and insurance professionals from across the nation.

The conference program includes many occasions to connect with colleagues, presenters, sponsors, and exhibitors: the 75th Anniversary Reception and Gala, the LRS cocktail hour, meals, breaks, and some free time to connect around the City of Portland!

Whether you're new to the financial services industry or an experienced professional, it is crucial to cultivate your career. At the WIFS National Conference, you'll find the tools, education, colleagues, and community you need to nourish and grow personally and professionally.

Register online! Visit wifsnational.org/conference

Featured Speakers

Ann Schatz



Ann Schatz is widely known and regarded as an accomplished sports broadcaster, speaker and entrepreneur. With a sports broadcasting career spanning over two decades, Ann's imprint on national and international broadcasting is impressive. Ann has provided live coverage for top competitions and venues across the globe including the NBA Championships, the Summer and Winter Olympic Games, the Boston Marathon, NCAA Men's

and Women's Basketball Tournaments and the US Women's Open Golf Championship.

Throughout her broadcasting career Ann has had access to the world's top athletes, coaches and sport companies, including Lance Armstrong, Tiger Woods, Michael Jordan, Mia Hamm, Nike and Adidas. Weaving her personal experiences with this elite group of individuals along with real life techniques and tools, Ann inspires her audiences to challenge the status quo and develop a plan to achieve breakthrough personal and professional results.

Ann attended Creighton University where she received her BA in Journalism and Mass Communication. She graduated cum laude in 1979.

Kelly Corrigan



It was a total shock to the system when Kelly Corrigan, a happily married mother of two young daughters discovered a cancerous lump in her breast at age 36. While undergoing treatment, she learned her beloved father George had late-stage cancer. As her life turned upside down, all at once she became the cared for and the caregiver.

A natural born storyteller, Corrigan recounts her experience in *The New York Times* best-selling book *The Middle Place*. She speaks about her journey of healing when it became her turn to take care of the

man who had always cared for her. She reveals how she became a woman who finally took the leap and grew up – facing down mortality while enduring family dynamics and her own complicated health issues.

With wrenching honesty, poignancy, and a dose of humor, she explores “the middle place – that sliver of time when parenthood and childhood overlap before a parent's illness hurls you into full-fledged adulthood and the realization of your parents' mortality as well as your own.”

Corrigan's most recent book is *Lift*, a stirring, affirming story of a young family in crisis. Written in the form of a letter to her children, *Lift* weaves together three true stories of adults willing to chance terrible loss in search of the joys of raising children.

Now healthy, Kelly is a journalist, speaker and contributing writer to *Glamour*, *Good Housekeeping* and Oprah's *O Magazine*. Corrigan has become an advocate for cancer awareness and supporting those dealing with cancer. She founded the website Circus of Cancer where she truthfully captures the breast cancer experience and offers inspiration for others.



Our History

In 2000, Women's Life Underwriters Conference (NALU) is re-named to Women in Insurance & Financial Services

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Featured Speakers (continued)

Dr. Quincy Krosby



Dr. Quincy Krosby is the Chief Market Strategist for Prudential Annuities. In this capacity, she is a member of the investment management group for the annuities division, where she provides perspective on the global macro-economic environment and financial markets. Previously, Dr. Krosby was the chief investment strategist for The Hartford, and global investment strategist for Deutsche Bank Asset Management. She also worked in the global markets groups at Credit Suisse and ING Barings.



Earlier in her career, Quincy Krosby was a US diplomat, serving in Washington and United States embassies abroad, including a posting as Energy Attache at the US Embassy in London. In addition to numerous assignments at the U.S. Department of State, she served as Assistant Secretary of Commerce, and represented the United States to the International Monetary Fund, positions which required confirmation by the United States Senate.

Dr. Krosby studied at the London School of Economics, where she earned her master's and doctoral degrees. She is frequently quoted in the financial press and on business television.

“Outstanding energy, fabulous speakers, a terrific experience!”

Gail Hand



Gail Hand has logged 20 successful years in corporate sales and management with corporations such as American Express, Southwestern Bell, and Macy's, where she garnered multiple awards including 10 leadership and president's club awards.

Now a corporate speaker, author and sales guru, Gail started her stand-up career in 1989 in San Francisco and has since toured over 1,000 companies, universities and associations in the US and Canada. With her Power of Laughter programs, including: leadership, sales, stress management, and diversity trainings, Gail has been a positive movement with companies, universities, and associations in North America.

Gail is the owner of two prestigious companies, a member of the National Speakers Association, National Association for Campus Activities, the International Federation of Speakers, and is even highlighted in Who's Who in Professional Speaking. Gail is past President of the Oregon National Speakers Association near her home in Portland, Oregon.

Gail is the author of *The Power of Laughter* and her forthcoming books: *The Power of Laughter at Work* and a book/play about dating (the title is secret).

Along with her own YouTube channel, Gail is an avid skier, golfer, photographer and blogger. She lives in Portland with her two Chihuahuas, who edit her blogs and twitter about their exciting life.



Our History

The ANGEL award is given to a member who has demonstrated attributes that have been instrumental to the success of her peers.

ANGEL stands for:
Assistance Nurture Guidance
Ethics Leadership

Ronald Williams



Ron Williams is an internationally recognized speaker and trainer with more than 30 years' experience in the public and private sectors. Ron is President of the Brand Enhancing Strategy Team (B.E.S.T.), a training and development company that specializes in leadership/management development, team building, and executive coaching. Before founding B.E.S.T. in 2001, Ron was the General Manager of the Western Region for Nike, Inc., where he was responsible for a \$600 million footwear and apparel business. While there, he created the corporate diversity program, where he was its first Director, as well as being the Director of Training and Development. Ron has also held key managerial roles at Champion Products, Pelle Pelle, and Wilson Sporting Goods.

As a trainer, educator, and keynoter, Ron has developed a unique way of presenting information he calls "edutainment." This high energy and highly interactive style combines thought-provoking content with an entertaining delivery that makes audiences think, laugh, learn, and have a positive fun-filled experience. Ron's insights on 21st Century leadership, employee engagement, developing customer loyalty, brand building and peak performance make him one of the nation's leading resources in understanding organizational and individual success and achievement.

"I met a lot of great women... everyone was interested in more information!"

Visit the Conference Website often for up-to-date conference information and announcements!

Register online! Visit wifsnational.org/conference

Chapter Leader Workshops

Chapter Treasurers

This session, led by the National Treasurer, will be devoted to chapter financial processes, recordkeeping and reporting requirements, and tax and chapter IRS group exemption filing. Learn from other treasurers during open discussion and sharing of best practices. All chapter treasurers are strongly encouraged to attend.

Chapter Leaders

This session, led by National Board members and chapter leaders from around the country, will cover the hot issues all chapters face: board succession planning, chapter finances, sponsorships, and the tools you need to keep your chapter energized. Share your successes, learn from others who have been there, and get your burning questions answered. All chapter leaders are strongly encouraged to attend this valuable session!

Don't Miss the Exhibit Show

Be sure to visit the exhibit hall to network and learn about products & services offered by leading companies to support your career.

Exhibit Hours:

Thursday
12:00 pm - 4:30 pm

Friday
9:30 am - 4:30 pm

“Truly appreciate the cross-section of attendees - age, geography, demography. The energy was high!”

Who Should Attend?

Agents
Managers
Independent Representatives
Registered Representatives
Advisors
CPAs
Attorneys

Educational Sessions will include:

- **Panel discussions** featuring both top managers AND top producers
- **Workshops** for chapter leaders and treasurers
- **Leaving your legacy**
- How to **grow your profile** with social media
- **Harvesting your success**
- **Cultivating the brand in you**
- **Developing the leader within**



Schedule of Events

Thursday, October 20

9:00am – 12:00pm	Exhibitor Setup
9:00 am – 1:00 pm	WIFS National Board of Directors' Meeting
11:00 am – 6:00 pm	Registration Desk Open
12:00pm – 4:30pm	Exhibits Open
1:00 pm – 2:00 pm	Solomon Exam Prep – Series #65
2:15 pm – 3:15 pm	Chapter Leaders' Workshop
2:15 pm – 3:15 pm	Chapter Treasurers' Workshop
3:30 pm - 4:30 pm	President's Annual Address & State of WIFS
4:30 pm – 5:00 pm	Personal Time: <i>Refresh, Rejuvenate, Relax</i>
5:00 pm – 5:30 pm	First-timers and Leaders Recognition Society Reception
5:30 pm – 6:30 pm	75 th Anniversary Gala Cocktail Hour
6:30 pm – 9:00 pm	75 th Anniversary Gala and Awards Presentation

“Great speakers...great friends!
What else can we ask for?”

Friday, October 21

7:30 am – 5:00 pm	Registration Desk Open
7:30 am – 8:30 am	Breakfast
8:30 am – 9:30 am	Keynote Address “Leaving a Legacy From the Inside, Out” by Ann Schatz, <i>accomplished sports broadcaster, speaker and entrepreneur</i>
9:45 am – 11:15 am	Concurrent Sessions: 1. Top Producers Panel 2. Top Managers Panel
9:30 am – 4:30 pm	Exhibits Open
11:30 am – 12:30 pm	Concurrent Sessions: 1. “Pay It Forward Pays Off- Connecting Communities and Corporations via YOU!” with Ann Schatz, <i>accomplished sports broadcaster, speaker and entrepreneur</i> 2. “Tax Strategies for Business Growth” by Mary Strasdin, <i>CPA and tax consultant</i> 3. “Better Scripting for Better Results” by Gail Goodman, <i>financial industry phone expert</i>

continued...



Over the Years

From 1930 to 1945, the Great Depression and World War II focused everyone's attention on economic and political survival.

I Love Lucy premieres on CBS in 1951. Suburban life begins to grow.

In the 1960's, the establishment of a national Commission on the Status of Women puts the realities of women's lives on the public agenda for the first time.

The Equal Rights Amendment passes the House of Representatives in 1971 and the Senate in 1972. It is submitted to the states for ratification, and defeated in 1982. Doors begin to open for women leaders in business, politics, the professions and education.

Register online! Visit wifsnational.org/conference

Schedule of Events (continued)

Friday, October 21 (continued)

- 12:30 pm – 1:30 pm Lunch
- 1:45 pm – 2:45 pm **General Session** “Cultivating the Brand in You!” by *nationally recognized speaker and trainer, Ronald Williams*
- 3:00 pm – 4:00 pm **Concurrent Sessions**
1. “Harvesting Your Successes: Ideas for Transitioning Out of Your Practice” with Steve Parish, *expert on business owner financial planning*
 2. “Coping with Caregiving - Impacts of Long-Term Care” with Judith Hoyt Pettigrew, *author and women’s marketing expert*
 3. “How to Mitigate and Manage Risk for Your Client’s Portfolio, OIC with Options for Wealth Managers” with Eric S. Cott, *Options Industry Council Director & educator*
- 4:15 pm – 5:15 pm **General Session** “The Power of Laughter at Work!” by *corporate speaker, author and sales guru, Gail Hand*
- Friday Evening Explore Portland & enjoy a night on the town!

Saturday, October 22

- 7:30 am – 8:30 am Breakfast
- 8:30 am – 9:30 am **General Session** “Economic Updates Via the Eye of the Industry” by Dr. Quincy Krosby, *Chief Marketing Strategist for Prudential Annuities*
- 9:30 am – 10:30 am **Concurrent Sessions**
1. “Taking Your Business to the Next Level” with Ron Williams, *nationally recognized speaker & trainer. Exclusive session for LRS Members only*
 2. “Top Ten Reasons Agents Fail at Phoning” with Gail Goodman, *financial industry phone expert*
 3. “Using Social Media, Growing Your Profile” by *consultant, certified trainer and master coach, Kristen Andree*
- 10:30 am – 12:00 pm **Closing Keynote Address** “The Power of Women - Legacies of Love, Laughter and Sisterhood” by *NY Times best selling author, inspirational speaker and contributor to Glamour, Good Housekeeping and Oprah’s O Magazine, Kelly Corrigan*
- 12:00 pm – 12:15 pm **Conference Wrap-Up**
- 12:15 pm – 12:30 pm **Book Signing** by Kelly Corrigan
- 12:30 pm – 2:00 pm **Portland Tours & Activities**, hosted by WIFS Portland Chapter



Over the Years

In 1972, Katherine Graham becomes the first woman CEO of a Fortune 500 company, *The Washington Post*.

In 1981, Sandra Day O’Connor becomes the first woman appointed to the United States Supreme Court.

Thank You to our 2011 WIFS Corporate Partners

Diamond



Platinum



Gold



Our History

Noni Baldwin was WIFS' first Woman of the Year, in 1990.

In 1983, Sally Ride becomes the first woman astronaut in space.

In 1990, Darlene M. Iskra becomes the first woman to take command of a U.S. Navy ship.

The first African American woman is appointed Secretary of State in 2005, the first woman serves as White House Executive Chef in 2005, and the first woman becomes Speaker of the House in 2007.

In 2011, Women in Insurance and Financial Services (WIFS) celebrates its 75th Anniversary!

Register online! Visit wifsnational.org/conference



Our Host Hotel: Portland Hilton & Executive Tower

Our Host City: Portland, PDX, the Rose City, Portlandia



The Hilton Portland & Executive Tower looks forward to welcoming Women in Insurance & Financial Services. Luxury awaits you at Oregon's largest hotel. Located in the heart of the city, the hotel offers easy access to local attractions and the city's transit system. **Make your reservations today!**

Portland, Oregon is known by many names but all refer to a vibrant, creative, "green" and unique city with much to offer. From the **free streetcars and trains** downtown to "Portland's Living Room", aka **Pioneer Square**, to world-famous **Powell's Books**, the largest independent bookstore in the country, the sights and sounds are endless. (And here's a bonus: No sales tax in Oregon!)



You're sure to work up an appetite after a day full of learning and networking at the WIFS National Conference, and Portland is full of award-winning eateries. Gaining attention recently is the thriving **food-cart scene**. On almost every corner, you'll find a unique dining experience at one of more than 200 mobile food vendors. The carts offer everything from hotdogs, to gourmet peanut butter and jelly, to Czech, to Thai, to just about anything your taste buds desire!



At the end of the day, gather with friends old and new to experience Portland's **vibrant nightlife**, downtown, and in the neighboring **Pearl District** - a former warehouse district now buzzing with art galleries, bars, jazz and shopping - and of course Portland's famously vast selection of **local micro-breweries**. Stop in for a pint!

For family fun, visit the **Oregon Zoo**, the **Washington Park Rose Gardens**, or fill your brain at **OMSI, the Oregon Museum of Science and Industry**.

However you choose to spend your free time while in Portland, you are sure to enjoy this unique city and the friendly people who call it home. **Welcome!**

“The National Conference is always an opportunity to reenergize.”

WIFS 2011 National Conference Registration

Attendee Name _____

Designations _____

Name As It Should Appear On Name Badge _____

Company _____

Business Address _____ Email _____

City/State/Zip _____ Business Phone _____

Please check all that apply:

- Local Chapter Member
Chapter: _____
- Local Chapter Board Member
- Local Chapter President
- Current Past
- Past National President
- First WIFS conference

Hotel Information & Conference Registration Fees

Hotel Reservations: Hotel cost is **not** included. Please call the Hilton Portland at (503) 226-1611. Mention WIFS to receive the special room rate of \$155. Reservations must be made by September 20 to receive this rate. Visit www.wifsnational.org for additional hotel and travel information.

Conference Registration: A full conference registration includes all events and meals indicated on the agenda. Check the appropriate boxes below indicating your registration and any guest meal passes as needed.

Full Registration		
	Until 9.1.11	After 9.1.11
WIFS Members	\$ 475	\$ 575
Non-members	\$ 675	\$ 775

Registration fee includes all events and meals as indicated on agenda.



Guest Passes (meals and breaks only)	Cost
<input type="checkbox"/> Friday (all breaks, breakfast, lunch, Awards Gala)	\$175
<input type="checkbox"/> Saturday (breakfast, coffee breaks)	\$45
<input type="checkbox"/> Awards Gala only	\$95
Guest Name: (please print clearly)	
TOTAL conference registration + any additional guest fees	\$

Payment information

- Mastercard Visa AmEx
- Check enclosed (made payable to WIFS National Conference)

Return this form with payment to:

WIFS National Conference
136 Everett Road
Albany, New York 12205

or via fax to **518.935.9232**

or register online at
www.wifsnational.org/conference

Name as it appears on credit card

Credit card billing address

Credit card number Security code Expiration date

Signature

Cancellation Policy: All requests for refunds must be acknowledged in writing no later than September 30, 2011. There is a \$25 processing fee for each refund. Cancellations after September 30, 2011 will not be refunded, no exceptions, including credit card charge-backs. Forfeited fees cannot be applied to future meetings. Refunds will be processed within 30 days of written acknowledgment.

Name Badge Policy: Please note, there will be a \$300 replacement fee for lost name badges.

Register online! Visit [wifsnational.org/conference](http://www.wifsnational.org/conference)



WIFS National Conference
136 Everett Road
Albany, NY 12205

Cultivate *Your Career* *Grow Your Legacy*



Our History

In 2010, WIFS reached over 1,000 members and 30 chapters, and continues to grow by leaps and bounds.

Register online!
wifsnational.org/conference