

FEBRUARY 2011



THE IBA SFV CONNECTION

INSURANCE BROKERS AND AGENTS OF THE SAN FERNANDO

Calendar of Events 2011

FEBRUARY

- 07 - Executive Board Meeting
- 09 - Board of Directors Meeting
- 17- Kicking Off For Fun in 2011
(Yankee Doodles)
- 17—Community Blood Drive
(mgrisanti@hoffmanbrown.com)

MARCH

- 07 - Executive Board Meeting
- 09 - Board of Directors Meeting
- 15 - Political Summit (Sacramento)
- 24 - I-Day ~ www.la-iday.com

APRIL

- 04 - Executive Board Meeting
- 06 - Board of Directors Meeting
- 13/15 - Big I Legislative Conference

MAY

- 01/05 - Blue Ribbon Conf - (Hawaii)
- 09 - Executive Board Meeting
- 11 - Board of Directors Meeting
- 19 - Golf Day - (Moorpark Country Club)

CHECK US OUT AT
WWW.IBASFV.ORG

PRESIDENT'S MESSAGE - ERIC ROTHMAN

Here we are in a New Year. We have new goals and prospects that we aspire to achieve by the end of 2011. It feels like a fresh start. I am now the IBA-SFV President for 2011. It has been a long road for myself. However, the road has been so fulfilling that I would encourage everyone to take the same journey.

In 2011, I am beginning my 15th year in the insurance industry. Personally, my family life with my beautiful wife Heidi and my two wonderful children William and Lillian could not be any better. Professionally our industry is in a constant state of change. Change has allowed my company and our association to not only survive but actually to grow and thrive in this strange economy. Retention is still vital to all agencies. The soft market is still eating away at our industry. Rates are trying to go up but with the economy still in the tank there is nothing to support higher rates.

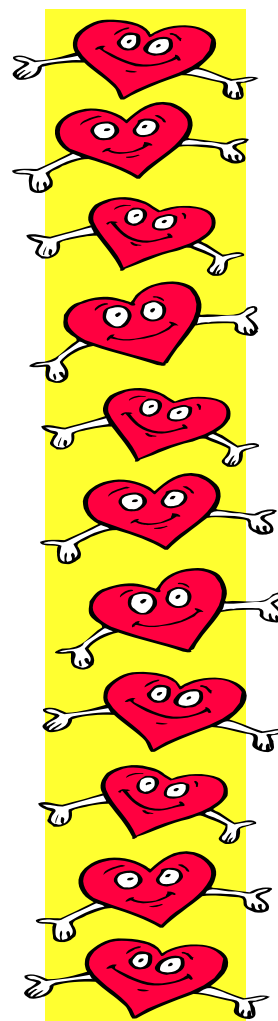
Clients in both Personal Lines and Commercial Lines are looking at every penny differently than they did 5 years ago. However, we cannot just tell the client, "You should have put the money in the bank that I just saved you because at some point I will be asking for it back." Our clients are

more savvy and frugal than they once were. It is no wonder why everyone is marketing even their smallest piece of business.

For our association I have two major goals to achieve in 2011. First I would like to find out what has been done well with new members and long standing members so that we can try to expand and improve what we have done for you our members. Second I would like to see increased participation among our member agencies. I would like to see at least one member from all members agencies at all our events.

I started with C.M. Meiers in January of 1997. I was told at a young age that if this was the career I was to choose it would take at least 5 to 10 years to become established. Well, I am now in my 15th year of the insurance industry.

How time flies. I worked diligently in our office starting out selling small earthquake policies to anyone that would listen to me. However as time went on and with the guidance of professionals in our office I began to bloom.



PRESIDENT'S MESSAGE—CONTINUED FROM PAGE 1

In 2002 I was recruited onto the IBA San Fernando Valley board. At the time I did not know what the association did or how it could help me or my business. Dave Kern was the President at the time and I feel with some of his guidance he gave me the tools I needed to look at what I could learn from the association.

I took a break from the association after a couple years and then came back on with a renewed energy and focus. I took control of the young agent program and was then asked to step up to the executive board. I have learned a lot from being on the board. I have met so many people. Being on the board has allowed me to meet other agents, wholesalers and company people. Developing relationships has been and will continue to be beneficial to myself and to C.M. Meiers. It has been quite a ride so far and it is thrilling to see what is coming next.

As with most things, you get out of this Association what you put into it. It is my sincere hope that in 2011, each of you considers your participation in our organization an important part of your career in the insurance industry. I look forward to seeing you at our events.

I look forward to working with our new 2011 Board of Directors. With some new fresh faces and some grizzled veterans we can make this year one for the history books.

I am also sad to see David Winikoff and Jason Meshekow leave the board after years of dedicated service. Your time on the board has made me confident that I can lead and protect the legacy you leave behind.

I would like to thank the staff of C.M. Meiers Company for encouraging and supporting my participation and leadership of the IBA SFV. To my father, Herb Rothman, I send out a special thank you for letting me be myself and supporting me in whatever I do.

Here is to a fabulous year!

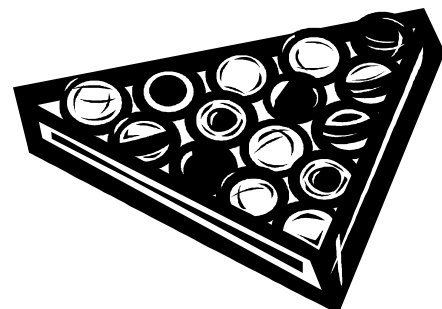
PRESIDENT ~ ELECT : GINA WILLARD

IBA San Fernando Valley ~ The New Younger is Older...

Here's to 2011!!! I'm pleased to oversee your new Young Agents Chair Darren Hasson. We are committed to all of your "fun levels" for 2011!! Darren is getting his feet wet and he's aware that a requirement of the Young Agent Events entails "cocktails and fun" at every one of our events. With that being said our first event is going to be held at Yankee Doodles on Thursday, February 17th @ 5:30.

There will be plenty of networking opportunities, raffle, pool tournament and "cocktails". We're looking for a raffle sponsor for \$750, a drink sponsor for \$500 and pool tournament sponsor for \$250.

Our special price for the first 40 attendees who RSVP is \$25.00, after 40 the charge will be \$40.00. Our non members pay \$40.00 (ask us about membership).



2010 IN REVIEW: JONATHAN SCHRETER—IMMEDIATE PAST PRESIDENT

This past December, the new slate of directors for IBA San Fernando Valley was duly elected by those members that attended our General Meeting. As my “lame duck” period as your 2010 President comes to an end, I wanted to take a brief moment to reflect on a year that flew by much too fast for our Association.

To be honest, we began 2010 amidst great uncertainty. Between an economy that continued to tease us with a recovery and market rates that remained doggedly soft, some agencies had difficulty in justifying membership to our association. Truthfully, minutes after taking my oath of office, I was worrying about what the state of the association would be by the time my term ended! So the fact that over 100 of us gathered, in force, for the 2011 Installation Lunch, I consider a great success!

But this success is not an accident. The determined contribution of eight volunteer board members and one sorely underpaid executive director led to the creation of numerous events and activities that brought local industry participants together in fun, creative and educational ways. A Masquerade Bowling Night, A Day at the Races, Casino Night, the Fall Supermixer and a delicious evening of wine tasting evening highlighted the social calendar. Our Golf Tournament at Moorpark Country Club remained our preeminent networking event, with Gary Koch’s team from the Hartford taking the 2010 title.

Three board members travelled to Washington DC last March and three more visited Sacramento in June. They spoke directly to our local representatives there, advocating for issues directly related to our very livelihoods. Political advocacy is one of the least heralded, yet most important values our association delivers to our members and I, for one, appreciate their efforts on our behalf.

I-Day 2010, which we co-hosted with IBA chapters from Burbank, Glendale, Pasadena and Los Angeles, had over 350 attendees and featured a great panel debate between candidates for Insurance Commissioner, as well as a well-received keynote address by LA County Supervisor Zev Yaroslavsky.

And lastly, thanks to the concerted efforts of Board Member David Winikoff, we awarded three scholarships at Cal State Northridge for InVEST to promote our industry to the next generation.

Now much of this could not have happened without the help of our generous and accommodating Associate Members. Nearly 20 boosters found opportunities to support our events through sponsorship dollars and volunteered time. This association will only continue to succeed with your cooperation and contributions. So on behalf of myself, the board and our member agencies, thank you for your participation.

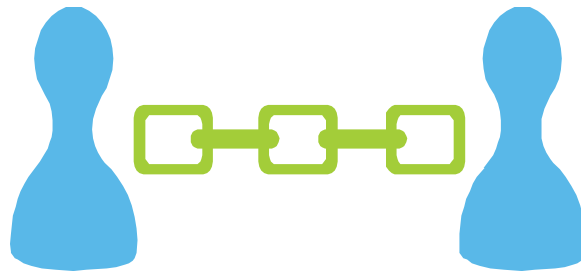
As my term comes to an end, I hope that I’ve succeeded in elevating the value of this association, if ever so slightly, in the eyes of our members and our boosters. Industries need their associations. They create opportunities to enhance your network, broaden your knowledge and take charge of your career. We have four new Board Members joining us this year, our largest freshman class in the history of the association. They see the value. I hope you do, too.

NEW BOARD OF DIRECTOR: BRETT BOSSUK

Social Media Explosion

Now more than ever social media is playing an integral part in both peoples personal and business life. Facebook currently has over 500+ million users which means if Facebook were a country it would be the 3rd most populated country in the world. Now is the time for Insurance agencies to get acquainted with social media and begin to market to both existing customers and new business via social media.

Our agency, B&B Premier Insurance Solutions, was first unsure about how social media would really help an agency grow, but it is now undeniable the impact social media can have on an agency. If done correctly with a combination of twitter, Facebook, linkedin, etc. social media can now help your business. SEO (Search Engine Optimization) is now more important than ever and if you are not on social media either tweeting or blogging, than you are behind the times. Take some time to look up the statistics of how many customers are looking for insurance online, the numbers are quite staggering.

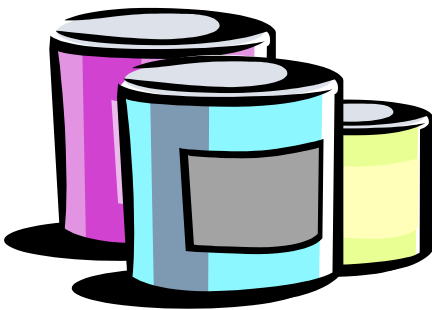


SECRETARY / TREASURER REPORT - JANICE WENDT

Where has the time gone? I know they say the older you get the faster time goes by, but 2010 has just flown by. I have really enjoyed being a part of this great organization.

In these tough times with the unemployment so high and our local food banks suffering. IBASFV would like to help. We think it would be a great opportunity to give back to our community. In the next year we have many fun events planned. We thought it would be a good idea if you could bring a food item such as: canned or paper goods, or personal hygiene items when attending an event. We will then take the donations to a local Food Bank in the San Fernando Valley.

We have had some awesome events this past year with great turn outs. We could help to make a difference. So I would like to thank you for your support of the IBASFV and look forward to 2011. If you know someone that is not a member and/or a booster, talk to them, and bring them to an event. You know what they say the more the merrier.





Membership—A Partnership For Success!

I DAY 2011

On

Thursday March 24, 2011

Burbank Airport Marriott Hotel & Conference Center
2500 N. Hollywood Way, Burbank, Ca 91505

Exhibitor Sponsor registration available now
<http://www.la-iday.com>

Attendee information and registration is also available now

NEW BOARD OF DIRECTOR: DARREN HASSON

While captive agents work directly for the insurance companies they represent, independent insurance agents work directly for their clients. When it comes to selling insurance policies, this makes a huge difference. A captive agent can only sell policies provided by a single insurance company. It doesn't matter if another insurance policy is more comprehensive or just less expensive with the same coverage, the captive agent is limited to the products of the company he/she represents.

An independent insurance agent, on the other hand, can help their clients find better terms and the lowest rates. Unlike captive agents, independent insurance agents are never limited by a single company's offerings. For the last eight years, Darren worked as a captive agent. While he was able to help a lot of people, he was also limited to the products of the company for which he worked. As a captive agent, he did not have a need to participate in market research or to pay particular attention to other products carried by other insurance companies because he couldn't offer them to his clients. Even if he did, he never had the inside information on other companies' products or their pricing as we have today at our agency. No captive agent does, nor can they, because to fully gain this information, you have to have a brokerage agreement in place with these companies.

You wouldn't want to play golf with one club in your bag, would you? Then why would you settle for the single product offering of a captive agent? Choose your local independent agency like Whins Insurance!



2011 BOARD OF DIRECTORS



Glad we got through that...



*Insurance Brokers and Agents of the San Fernando Valley
Officers and Directors of 2011*

Board of Officers

President—Eric Rothman
C M Meiers Company
818-224-6100
erothman@cmmeiers.com

President Elect – Gina Willard
Nancy Bond Ins Services
626-599-8559
gina@nbondinsurance.com

Secretary / Treasurer - Janice Wendt
Wells Fargo
818-464-9300
Janice.wendt@wellsfargo.com

Past President - Jonathan Schreter
Hoffman Brown Company
818-986-8200
jschreter@hoffmanbrown.com

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B & B Premier Ins. Solutions
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Director – Cynthia Andrachick
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Director – Darren Hasson
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Director – Fred Weston
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Director - Michelle Jackson
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Director - Terry Miller
Northridge Ins Group
818-349-5200
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Executive Director - Marian Jocz
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BOARD OF DIRECTOR: MICHELLE JACKSON

Serving on the Board of IBA-SFV last year as a freshman was a fantastic experience. The mentorship of existing members helped me quickly become acclimated to how our association operates and where I could be of most value to the organization and industry as a whole. Out of that experience myself and my fellow Board members agreed that it would be a great idea for me to become the official Political Advocacy Chair for 2011. While there has not been an official position in several years, we all believe that Political Advocacy is a critical component of our association and we must be proactive in our efforts. Looking ahead, I will be participating in the Sacramento Political Conference this March as well as the National Legislative Conference in Washington D.C. in April.

If you personally have any questions or suggestions related to the involvement of IBA-SFV in Political matters that effect our industry or if you have contacts with local political leaders who you think we should be building relationships with, please do not hesitate to contact me.

Thank you!

GOLF DAY— TERRY MILLER

What should you look for when trying to host a golf tournament fundraiser? The first thing you need to do is to find an acceptable date that will be good for all or most participants. The next thing to do is to call several different golf courses and or country clubs and get bids for your event. You would be surprised at how much cost will vary. Sometimes as much as 30% to 35%. The next step is to form a golf committee. Usually 5-7 people is best. Give each member something important to do. Just because you are the chairperson for the event, does not mean you have to do all the work. Once you have decided on a venue and a date, make sure you work very closely with the tournament director and catering manager at the course. Leave nothing to chance. Spell out everything you can, from the food dishes to the color of the tablecloths. Go over the layout of the tables and chairs and sponsorship banners, several days before the event. Is there a podium available? Do you need a microphone? How about tables to display trophies for the winning teams? Make sure to have a large and attractive check in area at the front of the golf course. Make sure it is well shaded for golfers and volunteers. Make sure all of the volunteers and committee members know their purpose and duties. Keep the check in lines moving, and make sure that all the golfers know where to go after check in. Your registration sheets are of the utmost importance at this time. These sheets will also tell each golfer what hole they will start at. Registration sets the tone for the entire day. Always have kind, courteous, and helpful people at the registration tables. Make sure everyone feels welcome.

Sponsors and Sponsorships are crucial to the success of any fundraiser. Make sure your sponsors get the notoriety they deserve. Signage is one of the best ways to accomplish this, at registration, on the course and at the 19th hole dinner and awards program. You cannot thank your sponsors enough. Without your golf sponsors, your golf tournament will not succeed. Don't be afraid to thank them more than once. They will appreciate the acknowledgement.

There are many other aspects of the golf tournament that I have not mentioned, such as, 1) the quality of the food, 2) lots of cold drinks, 3) variety of cold drinks, 4) snacks, 5) give away items at check in, 6) itinerary for the day. 7) rules of tournament, 8) special prizes and contests, 9) new car for a hole in one, 10) appropriate raffle prizes. As you can see, there are a lot of things to do to have a successful golf tournament. The number one thing to remember about any golf tournament fundraiser is... make sure that everyone has a fun and memorable day! I look forward to another great IBA-SFV golf tournament on Thursday May 19th, 2011 at the beautiful Moorpark Country Club.



BOARD OF DIRECTOR ~ FRED WESTON

Working Together

Last year I was one of the coach's for my son Sean's T-Ball baseball team. I was really happy as baseball is one of my favorite sports. And we were the Dodgers, and that made it even better.

As many of you know, T-Ball is very interesting. Most players have a tough time batting and especially fielding the ball. Players in the outfield would rather pay attention to the grass than what is happening in the game. One game Sean was the pitcher, which when the batter does hit the ball usually comes to him or her. On one particular play, the batter from the opposing team hit the ball to Sean. He gobbled up the ball and ran as fast as he could to first base and got the batter out.

As most of you can attest, this is a rare feat in t-ball. Sean ran back to the pitcher's mound with his arms held high. As we all were congratulating him for his great play, the Manager of our team shouted to him what a great play he made, however next time to throw the ball to the first baseman. Sean, ever the spirited one promptly shouted back "HE CAN'T CATCH IT"! Okay, I should have told Sean that was not nice and should have apologized to the first baseman, but I just buried my head in my hands to try to stop laughing.

I've thought about this since that time, and every time I think about it, it still makes me crack up. But I have also thought there is an important message as well. We need to realize that we cannot do our jobs ourselves. As Sean would learn later, he needs the other players on his team to be able to win. For us, we need our company, our vendors, our associates to help us do our job and to do it well. As a producer, I could not do my job without the support of my account managers and the other individuals in my office from the receptionist to the CEO, the insurance companies, the underwriters and all the other myriad of other people for me to provide the insurance and service I need for my Clients.



As one of your board of directors I will be lending my support to others in our organization to make this the best Chapters of the IBA. I hope all of you will be part of this team as well.

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**Jason Meshekow & Jonathan Schreter
Both Past President's now**



**David Kern Installed the 2011
Board of Directors**



**Jonathan Schreter with Millie Jones of
Supervisor Antonovich's office**



**Jonathan Schreter with Michael Tou of
Congressman Sherman's office**



**Jonathan Schreter with Francisco
Covarrubias of Assemblymember Gatto's office**

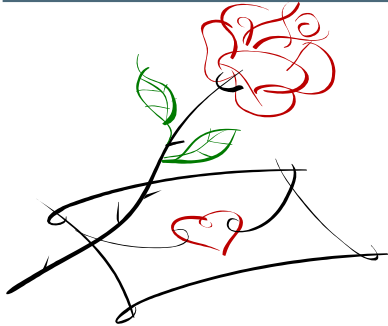


**Jonathan Schreter with Chris Ward of
Assemblymember Smyth's office**



Independent Brokers and Agents of
the San Fernando Valley
wishes you a

**Happy Valentine's
Day**



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Website: www.ibasfv.org

