



TOOLS, TECHNIQUES, PROCESSES AND INSIGHTS

Systems for Success Research Series

Great Ideas Book Series

The Essentials of Leadership and Management Programs

LAMP Annual Conference

Locally Delivered Workshops

Online Assessment Tools

Teleconferences

CD-ROM- and Video-Based Training Programs



Welcome to GAMA International's 2008 Professional Development Resource Catalog

This catalog is your professional development resource guide. It provides you with solutions — tools, techniques, processes and insights — that have worked for top-performing field leaders in a wide variety of business areas.

Our 2008 collection of resources includes several tools that are new, including our *Great Mentoring Ideas* book and our *Building High-Performance Adviser Teams* suite of research-based products, both of which will debut at LAMP, as well as classic tools such as *Sales Builder* that our members rely upon year after year.

Our resources are indexed in two ways to help you locate what you need:

- The catalog itself is organized by grouping similar items together. For instance, if you're looking for one of our "Great Ideas" books, you can look at the Contents, opposite, where you'll see that "Great Ideas" can be found on page 2. You will find ordering information on the left-hand page, while descriptions of each resource are on the right.
- If you want to look for resources on a particular topic, such as recruiting and selection practices, turn to the Contents by Topic. It will point you to different locations in the catalog where you can find professional development resources on recruiting and selection.

We wish you a profitable and productive year.

GAMA International extends sincere thanks to the hundreds of field leaders who have generously shared their skills, experiences and wisdom to make this collection of professional development resources possible for our members.

**BUILDING THE LEADERS WHO BUILD
THE FINANCIAL SERVICES INDUSTRY**



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Visit www.gamaweb.com
and select GAMA Source
for free access to resources
available exclusively to GAMA members.



LAMP 2009

Leadership and Management Program



Coming to Atlanta in 2009



Filled with winning strategies...



NEW *Great Mentoring Ideas*
(Volume VII) Order No. GGI007

Great Recruiting Ideas
(Volume I) Order No. GGI001

Great Retention Ideas
(Volume II) Order No. GGI002

Great Marketing Ideas
(Volume III) Order No. GGI003

Great Leadership Ideas
(Volume IV) Order No. GGI004

Great Contest & Recognition Ideas
(Volume V) Order No. GGI005

Great Team-Building Ideas
(Volume VI) Order No. GGI006



Volume Discount Pricing	GAMA Member	Nonmember
1-9 copies	\$19.95 each	\$29.95 each
10-49 copies	\$18.50 each	\$28.50 each
50-99 copies	\$17.00 each	\$27.00 each
100-499 copies	\$16.00 each	\$26.00 each
500 or more copies	\$15.00 each	\$25.00 each

Special Package Pricing for GAMA Members Only!

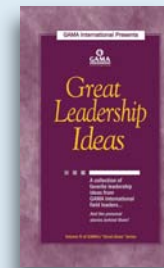
Great Ideas Volumes I-V
Order No. GGIP001 \$89.95

...from the industry's brightest stars

AVAILABLE AT LAMP 2008!

Great Mentoring Ideas

Find out how top-performing field leaders mentor new associates for a fast start; revitalize senior associates' careers, guide them to new markets or plan for their own succession; and help career changers find a home in the financial services industry. From traditional mentoring systems to informal pairings of mentor and protégé to peer-group mentoring, you'll learn many different approaches to successful mentoring.



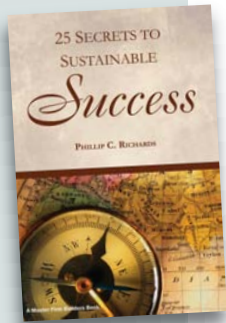
"Great Ideas" Book Series

These little books are full of big ideas and practical, proven strategies, tips and advice from some of GAMA's most respected and successful members.

From mentoring to marketing, from recruiting to retention, you'll learn from some of the best minds in the industry. And they're inexpensive enough that you can give a copy to each member of your management team.

Then see how many more great ideas you and your team can come up with!

Your key to sustained **success as a leader ...**



25 Secrets to Sustainable Success

A Master Firm Builder Book

By Phillip C. Richards, CLU CFP RHU

John Newton Russell Memorial Award 2007

GAMA International Management Hall of Fame 2005

GAMA International President 2002–2003

Order No. GMFBO01

Volume Discount Pricing	GAMA Member	Nonmember
1–10 copies	\$29.95 each	\$39.95 each
11–50 copies	\$25.95 each	\$33.95 each
51–100 copies	\$23.95 each	\$31.95 each
101 or more copies	\$20.95 each	\$27.95 each

A Guide to Establishing Study Groups

Order No. GGSG

GAMA Member \$29.95 Nonmember \$39.95

“I am indebted to GAMA for getting me into a study group. Sometimes we are so isolated in our work that we take things for granted, or we think we’re the only ones who have certain problems. When you’re a study group member, you see that these situations are universal, and you get to see how other field leaders handled them. There’s a lot of cross-pollination that goes on.”

Quincy M. Crawford, CLU
GAMA International Management
Hall of Fame 2006

... and your own personal **board of directors**

25 Secrets to Sustainable Success

Take an in-depth look at the leadership strategies that have created one of the most successful organizations in our industry.

25 Secrets is a leadership guide that incorporates proven practices in business strategy, leadership philosophy, sales psychology and day-to-day management tactics fully customized to our industry. It will inspire you and reignite your passion for building your own master field organization.

In the spirit of sharing, Phil generously donated the proceeds from the sale of *25 Secrets to Sustainable Success* to GAMA International. Thank you, Phil!

“Every aspiring field leader should read 25 Secrets to Sustainable Success. It’s a step-by-step guide that will show you what to do and how to do it. I read everything I can on leadership, and this is one of the very best.”

“Coach” Conk Buckley, CLU ChFC FLMI
 AIG American General (Independent Agency Group)

“Phil Richards is the quintessential 21st-century servant leader. His record of achievement is without peer in the industry. Drink deeply of the wisdom in this book. Your life and your results will be changed forever.”

Charles A. Smith, CLU ChFC
 GAMA International Management Hall of Fame 2006

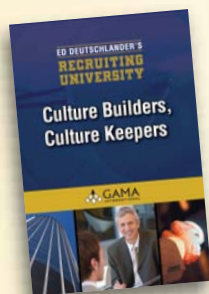
A Guide to Establishing Study Groups

One of the key activities that is common among the industry’s most accomplished field leaders is participation in professional study groups.

Phillip C. Richards, CFP CLU RHU, the mastermind of GAMA’s study groups initiative, has said that being in a study group is like having your own personal board of directors.

GAMA’s *A Guide to Establishing Study Groups* is your resource to launch and participate effectively in a cross-company study group. The guide explains —

- The purpose of study groups, models for study group structure and information to help individuals determine if a study group might be right for them
- Considerations for launching a study group, including structure, ground rules, populating and repopulating the group, finances and bylaws
- Meeting logistics, including setting an agenda, managing logistical details, chairing or hosting a meeting and reconciling finances
- Creating a successful study group presentation and a meaningful agency or firm overview
- Developing a culture of trust
- Specific responsibilities of study group members and mentors

Learn how to **recruit and select ...**
**Ed Deuschlander's
Recruiting University**

DVD, workbook, 1 copy of
Do Well by Doing Good

Order No. GEDU-0001

GAMA Member \$125 Nonmember \$175


***Do Well by Doing Good:
Should I Become an Advisor in
the Financial Services Industry?***

25 per package

Order No. GEDU-0002

GAMA Member \$25 Nonmember \$35



... the cream of the crop

NEW

Ed Deuschlander's Recruiting University

Edward G. Deuschlander, CLU CLF, executive vice president of North Star Resource Group and GAMA International president 2007–2008, has a well-deserved reputation for recruiting the best and the brightest.

In these Recruiting University materials, he'll lead you through the processes that have given North Star a retention rate that's four times the industry average. They're based on what Ed calls REPS — Recruiting Emulates the Process of Sales. The informative DVD and accompanying workbook will help you —

- Articulate your recruiting vision, mission and goals
- Tell your firm's story
- Analyze your current recruiting efforts
- Develop a candidate profile
- Establish an intensive interview and selection process.

Recruiting University includes a DVD, workbook and one copy of *Do Well by Doing Good*. Bring your team together and learn how a master recruiter finds and hires the right people for his firm.

NEW

***Do Well by Doing Good:
Should I Become an Advisor in the Financial Industry?***

The *Do Well by Doing Good* booklet contains information that helps candidates make decisions about a career in the industry by pointing out both the rewards and the challenges. The booklets are sold in packs of 25, so you can give them away to every candidate in your selection process. This valuable recruiting and selection tool will help candidates make the right career choice for them and for you.

Ed wants you to be a top recruiter, too, and graciously donated the proceeds from the sale of Recruiting University and *Do Well by Doing Good* to GAMA International. Thank you, Ed!

Revealing the **industry's best practices** ...

Guidebooks	GAMA Foundation Contributor \$100	Noncontributor \$500
Audio Guidebooks*	GAMA Foundation Contributor \$100	Noncontributor \$500
Applications Booklets	Prices vary. See below.	

AVAILABLE AT LAMP 2008!***Building High-Performance Adviser Teams:
Using Teamwork to Maximize Productivity and Success***

Guidebook	Order No. GFN0801
Audio Guidebook on CDs	Order No. GFN0802
Applications Booklet	Order No. GFN0803
GAMA Foundation Contributor	\$15 Noncontributor \$25

Finding the Right People

Guidebook	Order No. GFN0601
Audio Guidebook on CDs	Order No. GFN0602
Applications Booklet	Order No. GFN0603
GAMA Foundation Contributor	\$25 Noncontributor \$50

Building the Right People

Guidebook	Order No. GFN0401
Audio Guidebook on CDs	Order No. GFN0402
Applications Booklet	Order No. GFN0403
GAMA Foundation Contributor	\$15 Noncontributor \$25

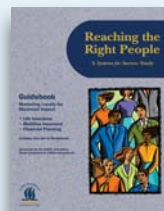
Keeping the Right People

Guidebook	Order No. GFN0501
Audio Guidebook on CDs	Order No. GFN0502
Applications Booklet	Order No. GFN0503
GAMA Foundation Contributor	\$15 Noncontributor \$25

***Reaching the Right People:
Marketing Locally for Maximum Impact***

Guidebook	Order No. GFN0701
Audio Guidebook on CDs	Order No. GFN0702
Applications Booklet	Order No. GFN0703
GAMA Foundation Contributor	\$25 Noncontributor \$50

* Each audio guidebook includes one copy of the applications booklet, which contains the worksheets, action plans and other supplemental forms that are printed in the guidebook.

... to help you **launch your business**
into the future***Systems for Success Research Series***

The GAMA Foundation sponsors world-class research that provides practical tools for field leaders on critical business topics. It is funded entirely by contributions from individual field leaders.

About the Systems for Success Research Series

The GAMA Foundation's *Systems for Success* research series presents valuable research results in an easy-to-implement format. Use the straightforward management tools — guidebook, audio guidebook and applications booklet — in whatever combination suits your needs to bring the research results into clear focus for your organization. You'll learn the best practices of top organizations in our industry, then work through our process to tailor these proven tactics to your own agency or firm.

NEW***Building High-Performance Adviser Teams:
Using Teamwork to Maximize Productivity and Success***

Increased customer demands, more complex products and more competitive market realities have inspired field leaders to explore new ways of working. Traditionally, most firms in the insurance and financial services industry have cultivated an entrepreneurial environment. In recent years, however, many successful agencies have evolved from that individual orientation to a more team-oriented one. *Building High-Performance Adviser Teams* shares important lessons on creating successful producer teams.

Finding the Right People

- Proven practices for identifying and selecting the best candidates for your agency or firm

Building the Right People

- The critical elements of launching new associates on a fast, productive start

Keeping the Right People

- How top agencies and firms retain their best and brightest sales talent

Reaching the Right People: Marketing Locally for Maximum Impact

- The whats and hows of local marketing techniques used by some of the most successful firms in the industry

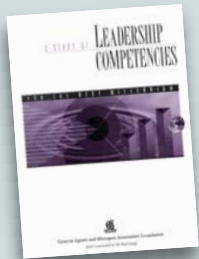
See page 20 for related *Field Leadership Series* workshops.

State-of-the art **research ...**



Building High-Performance Field Organizations in the New Financial Era — Navigator Series (2000)

100 pages, including worksheets and case studies
Order No. GFN0001C
GAMA Foundation Contributor \$100 Noncontributor \$500



Leadership Competencies for the Next Millennium (1997)

Research Report
 60 pages
Order No. GFN9701C
GAMA Foundation Contributor \$100 Noncontributor \$500

Applications Guide
 108 pages + exercises, questionnaires and 50-minute video
Order No. GFN9702C
GAMA Foundation Contributor \$100 Noncontributor \$500



Agency Marketing Models for the Next Millennium (1997)

Research Report
 124 pages
Order No. GFN9703C
GAMA Foundation Contributor \$100 Noncontributor \$500

Applications Guide
 50 pages + worksheets and 50-minute video
Order No. GFN9702C
GAMA Foundation Contributor \$100 Noncontributor \$500

... revealing top strategies from **successful field leaders**

Additional GAMA Foundation Research Studies

All GAMA Foundation research is funded entirely by contributions from individual field leaders. In addition to the Foundation's *Systems for Success* suite of research studies, the following research is available:

Building High-Performance Field Organizations in the New Financial Era

- Strategies for navigating a smooth transition to insurance-based financial services

Leadership Competencies for the Next Millennium

- The personal leadership competencies that determine superior organizational results

Agency Marketing Models for the Next Millennium

- Cutting-edge marketing models for building effective organizations, with an introduction to five productive, cost-effective methods for distributing life insurance

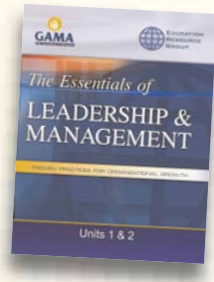


Develop your customized 10-year business plan ...

2008 Open-Enrollment Schedule

January 14–18	Falls Church, VA
June 9–13	Saint Paul, MN
August 11–15	Falls Church, VA
October 6–10	Falls Church, VA

GAMA Member	\$1,795/registrant
Nonmember	\$1,995/registrant



“The Essentials of Leadership and Management is the single most impactful school I’ve been to in my career. It takes you back to basics: leadership and how to run your practice day in and day out.

We learned the ‘law of minimum expectations’: you have to define the minimum you expect from people and hold them accountable. It’s a mindset I adopted immediately and it has changed my practice. Along with that, I learned not to be afraid to expect more from others and if they don’t measure up, not to be afraid to decide whether or not they’re right for my organization.

The most important things we learned about leadership are to be consistent and stick to what you believe in.”

Victor Goldman
MassMutual Financial Group



... in an interactive, masters-based program

The Essentials of Leadership and Management

The Essentials five-day residency program is an approved class in the Chartered Leadership Fellow (CLF) curriculum of The American College and qualifies for 30 PACE credits.

Each participant leaves the program with a complete 10-year business plan customized to his or her firm or agency. The Essentials program compresses the demands of the field leader’s job into five essential elements:

- Leadership, vision and values
- Recruiting, selection and retention
- Training, supervision and accountability
- Personal development and goals
- The business plan

Formerly titled *The Essentials of Management Development*, the course has been updated to include —

- Expanded faculty
- Broader content
- Additional contemporary issues

No program in the industry compares with *The Essentials*. It features —

- **Certified, veteran instructors whom you know and respect:** *The Essentials* program is facilitated by certified instructors with extensive industry experience.
- **An interactive, dynamic learning environment:** Our facilitators use a variety of media to create an exciting experience that capitalizes on the best practices in our industry.
- **Insight from MAA/MFA qualifiers:** Throughout the program, participants receive guidance, direction and perspective from Master Agency/Master Firm Award qualifiers.
- **An expanded process:** Participants have the opportunity to receive a 360° leadership assessment as well as the option to register for post-class coaching services.
- **The final result:** Participants leave the class with an extensive, customized business plan to guide their organizations for the next 10 years.

GAMA Foundation's Reaching the Right People

"Reaching the Right People is going to ensure that our local marketing programs are a success and continue to be a success. It gets our advisers in front of people on a regular basis, it's going to take their business to the next level, it's going to get them active in their business as far as doing mailings and making phone calls on a regular basis."

Elizabeth Buckley
MetLife

GAMA's Best Practices teleconferences

"We had 10 managers from the Las Vegas area participate in a GAMA teleconference on building strategic alliances. After the teleconference, we had a great discussion about how we could put ideas that we learned to actual use. As a result, my partner and I struck an alliance with a young CPA who is now offering us referrals for his small-business clients for the products that we have. He will also be working with our agents on how to set their businesses up as small-business entities in offering his CPA services to them. GAMA's teleconferences make a difference when applied to your business practices."

Ken Gallacher, CLF LUTCF
American National Insurance Company

GAMA's The Essentials five-day residency program

"I am a graduate of the United States Military Academy and the U.S. Army Ranger course. Both are considered to be on the short list of the world's premier leadership courses. I am happy to add The Essentials of Leadership and Management to that list. For our industry, The Essentials of Leadership and Management is a 'not-to-be missed' course for any professional who wants to catapult their organization to higher levels of performance. I am convinced that if you want to significantly affect the culture of your organization, this is simply not optional. Every one of my leaders attended the course following my attendance. We know where we are going and why we do what we do every day. We can also track our progress and hold each other accountable."

Brad Berger, CFP
First Command

"The school was one of the most beneficial and informative sessions I have attended in recent years. The scope, content and depth of consideration given to preparation with regard to agency planning, operations, management and team development was and has proven to be invaluable. Now and going forward there are so many varied and changing dynamics involved in agency management. Our industry and profession deserve this type of diligent study, intelligent approach, examination and course design."

Charles C. Terry, CLU ChFC
Western & Southern Financial Group

LAMP, GAMA's annual meeting

"LAMP has had a significant impact on me and it will on anyone who attends. It will change the way you do business — how you recruit, grow, manage. For example, I learned about team selling and building strategic alliances, ideas I was able to implement right away. LAMP is a catalyst for change in your firm. You also learn about GAMA's other professional development opportunities, which are very good. Simply put, LAMP will show you how to be a better leader."

Craig A. Long, CSA LUTCF
MassMutual Financial Group

"LAMP is a fantastic opportunity to find out how financial services agencies structure, train and organize their producers. You're immersed in insurance and financial services for three days. We spend so much time running our businesses; LAMP is a chance to step back and learn what's really important and how to do it. You always come away with a better understanding of consumers and how to talk to them."

Thomasina Skipper, M.B.A., ChFC
State Farm Insurance Companies

Field Leadership Series workshops

"Building the Right People is fantastic! The material is great. The best thing is listening to other field leaders. The course has given me specific action items I can implement right away. I got a good idea in the very first section — to include veteran advisers in candidate interviews. It empowers the senior associates and we're getting more quality referrals from them now."

We have a good process for accountability, but there was no follow up. It was just, 'Give me your numbers.' At Building the Right People, I learned how to use the numbers to coach advisers. The days go by so fast that it's easy to break our own rules, but we can't do that if we want to be successful. Building the Right People reminded me how important it is to 'inspect what you expect.'"

Nicholas LoPresti, CMFC
Waddell & Reed Financial Services

"If you're going to be a leader, you need to stay on the cutting edge. It's not about how smart you are today or were yesterday. You need to keep your eye on the ball. Building the Right People helps you do that. It gives you a fresh look at what you're doing."

Jimmie L. Herrington, FICF
Modern Woodmen of America

Live programs developed exclusively ...

2008 Best Practices Members-Only Teleconference Schedule

January 23

Expanding Recruiting Through Diversity

Moderator: Ross Borzin, CLU, The Principal Financial Group

Order No. GFLF0801

Bring the untapped pool of adviser talent (ethnic, generational and female) into your firm so that your adviser team mirrors your market.

April 23

Using Technology as an Ally to Take You to the Next Level

Moderator: Daniel L. Lawrence, CLU FIC LUTCF, Modern Woodmen of America

Order No. GFLF0802

How can you use technology to improve your recruiting, supervision and training results? Find out how to become more efficient by embracing and keeping up with the latest technological advances.

June 25

Mentoring: Taking It to the Next Level

Moderator: Thomasina Skipper, M.B.A. Ch FC, State Farm Insurance Companies

Order No. GFLF0802

Find out how top performers mentor associates into successful careers. Learn how to formulate a mentoring program that gets results for your agency.

July 23

Driving Retention Through Meaningful Contact

Moderator: Dave Saviage, M.B.A., FIC, Thrivent Financial for Lutherans

Order No. GFLF0804

When was the last time you spent some quality time with your veteran agents? What does quality time mean to them? Learn how top firms create high retention rates among their veteran agents.

September 17

Annual Planning: Best Practices for 2009

Moderator: Steven M. Marziotto, CLTC CMFC LUTCF,
The Prudential Insurance Company of America

Order No. GFLF0805

Hear from leading industry managers how they prepare for annual planning, fast-start and early-year strategy discussions.

November 19

Passion Is What We Are About, Without It We Fail to Serve

Moderator: David E. Ayres, CLU, The Penn Mutual Life Insurance Company

Order No. GFLF0806

Without passion, you're selling, not caring. Listen in as experts describe their passion for this business and add fuel to your practice.

... BY field leaders **FOR** field leaders



Best Practices Members-Only Teleconferences

If you're looking for an inexpensive way to bring your team together and learn from industry leaders, look no further. GAMA's Best Practices teleconferences are the perfect way to stretch your team's thinking on topics that are vital to your business. All you need is a conference room with a speaker phone.

The Best Practices series features one-hour teleconferences six times a year on timely and important subjects that are developed by and for field leaders. Offered since 1998, these teleconferences —

- Are conducted exclusively for GAMA members as a membership benefit
- Feature practitioners sharing ideas across company and distribution lines
- Provide a valuable training forum for individuals and groups alike

GAMA members may download recordings of the teleconferences for free in 2008! Visit www.gamaweb.com and select GAMA source.

The one event that's **all about YOU** ...

LAMP Audio and Video Recordings

Keep your LAMP experience alive — purchase those presentations that you want to hear again or would like your team to hear. Many of the presentations from the general sessions are available on audio CD or DVD, while most afternoon sessions are available on audio CD.

LAMP 2007, Toronto

General Sessions

“Essential Essentials”

Daralee S. Barbera, CLU CFP CMFC, Waddell & Reed Financial Services

“The House that Management Built”

Luis G. Chiappy, CLU ChFC CFP LUCTF, AXA Equitable

“The System Is the Solution”

Robert J. Fashano, CLU ChFC MSFS, Guardian Life Insurance Company of America

“The Power of Guiding Hands”

Lillian B. Holt, CLF, State Farm Insurance Companies

“Seize the Opportunity: Just One More”

Timothy P. Murray, CLU ChFC, John Hancock Financial Network,
GAMA International President 2006–2007

“The Power of Honorable Leadership”

Evan H. Offstein, Ph.D., SPHR

Charles A. Smith's Hall of Fame Acceptance Speech

“At the Foot of Mt. Everest”

Athan P. Vorilas, CLU CLTC CMFC, The Prudential Insurance Company of America

“The Five ‘Cs’ of Leadership”

John. W. Wright, CLU, Northwestern Mutual

Lamp 2007 Highlights

Recordings of LAMP afternoon sessions are also available. Visit the website or contact GAMA for a list of 2007 afternoon sessions.

Audio CDs	GAMA Member \$15	Nonmember \$22.50
DVDs	GAMA Member \$25	Nonmember \$37.50

... and **reenergizing** your firm or agency

LAMP Annual Conference

GAMA's LAMP conference is the premier professional development event of the year. The meeting features educational workshops, an extensive Resource Center and presentations by world-class keynote speakers and many of the industry's most respected field leaders. Please visit www.gamaweb.com/lamp.htm for a detailed LAMP program and to register.

Future LAMP Meetings

- LAMP 2008** March 16–19
Marriott, San Francisco
- LAMP 2009** March 22–25
Hyatt Regency, Atlanta
- LAMP 2010** March 21–24
The Rio All-Suite Hotel & Casino,
Las Vegas
- LAMP 2011** March 20–23
Gaylord National Resort & Convention Center,
Washington, DC
- LAMP 2012** March 18–21
Marriott World Center, Orlando
- LAMP 2013** March 10–13
Manchester Grand Hyatt, San Diego
- LAMP 2014** March 16–19
Opryland, Nashville
- LAMP 2015** March 15–18
Marriott World Center, Orlando
- LAMP 2016** March 20–23
Rio All-Suite Hotel & Casino, Las Vegas



Customize LAMP for your team

Schedule a management meeting before, during or after the conference. LAMP provides the ultimate opportunity to bring your management team together in a dynamic environment to optimize their learning experience.

Learn the **best practices** of the industry ...

Field Leadership Series Workshops

Field Leadership Series workshops are offered in multiple locations around the country once a year.



Finding the Right People One-Day Workshop

Finding the Right People will be offered in most locations on **September 10, 2008**.

Call GAMA at **1-800-345-2687** or visit **www.gamaweb.com** for the city nearest you or to schedule a workshop at your location for your team.



Building the Right People One-Day Workshop

Building the Right People will be held in two parts at LAMP 2008: **Saturday, March 15**, from 1:00 p.m. to 5:00 p.m., and **Sunday, March 16**, from 8:00 a.m. to noon. *(Both sessions are required.)*

Call GAMA at **1-800-345-2687** or visit **www.gamaweb.com** for more information or to schedule a workshop at your location for your team.

Tuition per participant GAMA Foundation Contributor \$325 Noncontributor \$425

Watch for *Keeping the Right People* in 2009!

... from the **top performers** in the industry

Leading Practices Programs

Based on *Systems for Success* research from the GAMA Foundation, Field Leadership Series workshops and self-study programs are approved courses in the CLF curriculum at The American College. Field Leadership Series workshops also qualify for eight PACE credits. Participants receive a *Systems for Success* guidebook and a confidential online assessment and feedback report.

Field Leadership Series Workshops

NEW In 2008!

Field Leadership Series: *Finding the Right People* Workshop

High-performing field leaders don't leave recruiting and selection to chance. They *manage* the process in a consistent and systematic way. In this workshop, you'll learn—

- How to maintain high standards during the selection process
- The differences in candidate profiles between high- and low-performing agencies
- How to balance primary and secondary sources and avoid target-recruiting mistakes
- How to mine screening tools for maximum effectiveness and use selection tests to enhance your understanding of a candidate
- How to create a system for optimizing referrals

The workshop includes a self-assessment of your recruiting and selecting processes.

Field Leadership Series: *Building the Right People* Workshop

When you get advisors off to a fast start, they're more likely to stay with you. In this highly interactive workshop, you'll learn how to select candidates who are the right fit for the career, your company and your culture; assimilate them into your firm; use stories to put challenges in perspective; design rewards that support high activity and build camaraderie; provide the personal and professional support new associates need for success; and set high expectations and hold new associates accountable for results.

Includes an online assessment and confidential feedback from your team.

Portable, consistent
training for your team ...



Desktop Masters

Al Granum Introduces Managing with the One Card System

Order No. GDM004
GAMA Member \$20 Nonmember \$35

Sales Builder Kit

Includes two videotapes and an instruction manual.

Order No. GSB001
GAMA Member \$150 Nonmember \$300

Supplemental Materials

Agent Workbook

Order No. GSB004
GAMA Member \$10 Nonmember \$20

Poster Chart

Order No. GSB006
GAMA Member \$5 Nonmember \$8



... that's **inexpensive, effective**
and **easy** to use

CD-ROM- and Video-Based Training Programs

Having a client-management system that your agents can use to meet and exceed their *productivity* goals is a large part of the battle, but you also need an *accountability* system that will help them use that system to its optimum effect.

Al Granum Introduces Managing with the One Card System

During 28 years as the general agent for his Chicago agency, O. Alfred Granum, CLU, had the highest median productivity of any group of producers in the world.

In this program, Al explains why his powerful One Card System works. Two of his colleagues, Barry Alberstein, M.B.A., Ph.D., and Delia Alberstein, CLU, explain the science, psychology and management techniques of this highly acclaimed program.

On this CD-ROM, you'll get —

- Live footage of the speakers
- A rolling transcript
- Synchronized PowerPoint slides

Sales Builder Kit

GAMA's Sales Builder Kit is another valuable tool for developing productive associates. This hands-on toolkit uses a study group format, peer review, a record-keeping system and group encounters to spur associates to higher levels of productivity. Groups of producers with similar experience levels meet regularly to report their detailed activity levels and to offer each other ideas, suggestions and support. The kit gives you everything you need to get started, and the supplemental materials keep your entire team on a consistent work plan year-round.

The Sales Builder Kit includes two videotapes and an instruction manual.

Insightful tools ...

360° Leadership Assessment

Order No. GFNOTLDRO1

GAMA Member \$149 Nonmember \$199



Organizational Climate Assessment

Order No. GFNOTORG

GAMA Member \$119 Nonmember \$159



Building the Right People Assessment

Order No. GFNOTBRP

GAMA Member \$99 Nonmember \$129



Keeping the Right People Assessment

Order No. GFNOTKRP

GAMA Member \$99 Nonmember \$129



... based on GAMA Foundation research

Assessment Tools

Get the critical management information you need — in a confidential and easy-to-use format.

Proven practices form the core of each assessment tool we offer. Based on research findings from the GAMA Foundation, these tools bring the best practices from the best minds in our industry right to your fingertips.

360° Leadership Assessment

This assessment encompasses the critical elements of leadership success. In addition to your own self-assessment, you may invite up to 49 other people to provide feedback, including your boss, peers, management team, producers and staff. You will receive a confidential feedback report, plus a comprehensive planning guide to assist you in analyzing the feedback and planning for change. This tool can be used to assess individual leaders or the entire leadership team.

Organizational Climate Assessment

Learn your team's perceptions of the key elements in the work environment that directly impact their ability and motivation to perform well. The assessment is based on the critical success factors for a positive and healthy organizational climate — one that motivates and enables people to consistently produce world-class results. You may invite up to 150 people in your organization to provide feedback. You will receive a comprehensive, confidential report that includes recommendations for next steps.

Building the Right People Assessment

A companion tool to the GAMA Foundation's research study *Building the Right People*, this online assessment lets your newer producers tell you — confidentially — how effective your new-agent launch process really is. You may invite up to 50 people to provide feedback. You will receive a confidential report that assesses your use of the eight critical elements for new-associate productivity and retention.

Keeping the Right People Assessment

This online assessment, based on the GAMA Foundation's *Keeping the Right People* study, allows your successful producers to tell you, in confidence, how your firm or agency's systems and culture align with their needs and expectations. You may invite up to 50 people to provide feedback. You will receive a confidential report that assesses your use of the best practices that most impact top-producer satisfaction and retention.

Helping to strengthen the industry ...

MDRT/GAMA International Mentoring Program

To enroll, visit www.mdrt.org/mentor

“Mentoring: How to Give and Grow” CD or Cassette

Cassette

Order No. A0371

MDRT Member \$12 MDRT Nonmember \$15

Audio CD

Order No. C0371

MDRT Member \$12 MDRT Nonmember \$15

“We officially embraced the MDRT/GAMA International Mentoring Program and the MDRT concept in 1999. We qualified 86 associates the first year, and our total commissions went from \$11 million to more than \$20 million in five years. Our focus on becoming an MDRT shop was the primary reason for this increase.

During my career, I have had the privilege of mentoring more than 31 new associates, all straight off college campuses, and 23 of those producers are still in the industry today. For those of you doing the math in your head, that works out to about a 75 percent retention rate. In addition, 22 of those 23 are still with North Star, and all of them have qualified for MDRT.”

P. Shaun McDuffee, CLU ChFC AEP
Securian Financial Group



... through shared expertise and collaboration

MDRT/GAMA International Mentoring Program

The MDRT/GAMA International Mentoring Program is a significant resource for building distribution of financial products and services and for increasing key factors, including —

- Production by newer advisers
- Retention of new advisers
- Productivity of veteran advisers
- Profitability for agencies/firms

For most producers, qualifying for membership in the prestigious MDRT represents the industry’s pinnacle of success. To help more producers achieve this milestone, GAMA International teamed with MDRT in 1996 to develop the MDRT/GAMA International Mentoring Program, which pairs aspirants with mentors to increase the percentage of new insurance and financial services professionals who consistently reach MDRT-level production.

The manager’s role in this relationship is crucial to its success. He or she ensures that the aspirant/mentor relationship is progressing and oversees timely reporting of production figures to MDRT. The impact is phenomenal:

- More than a third of all aspirants who have entered the program have qualified for MDRT membership or have reached levels that make them eligible to attend MDRT’s annual meeting with their mentor
- Mentors’ income increases by an average of 14 percent during their work with aspirants
- More than 10,000 aspirant/mentor teams have participated in the program since 1996
- By the end of their second year, about 65 percent of aspirants who continue in the program qualify for MDRT

Making the **collective voice**
of the industry ...



Please order the following materials directly from LIFE.

The prices shown are for NAIFA members; the prices are higher for non-NAIFA members.

Multimedia Materials

<i>Product</i>	<i>NAIFA Member Price</i>
Protecting the Future (CD-ROM)	\$12.00
Focus of LIFE Insurance Multimedia Kit	\$65.00
Promotional Brochure with CD-ROM	\$1.00
Passion for LIFE (CD)	\$12.00
Getting the Most Out of LIFE (video and guide)	\$10.00
realLIFEstories DVD	\$25.00

Check out LIFE’s “Focus on Women,” “The Latino Market,” and “Life Happens” materials, which can be used to help your producers connect with clients year-round, but especially during Life Insurance Awareness Month (LIAM).

... louder and stronger

LIFE

The Life and Health Insurance Foundation for Education (LIFE) educates the public about the essential role of life and health insurance in sound financial and retirement planning and the value added by insurance agents and other financial advisers. LIFE was formed in 1994 by seven life and health insurance groups, including GAMA International.

Protecting the Future

This 10-minute CD-ROM, cosponsored by the GAMA Foundation, is designed to enhance company and agency recruiting efforts by offering a firsthand look at the challenges and rewards of the business. Top producers discuss how they got into the profession and what has motivated their careers. Also comes with Spanish or Portuguese subtitles.

Focus on LIFE Insurance Multimedia Kit

Redesigned and expanded in 2002, this turnkey kit for managers helps refocus producers on the need to make sure life insurance remains an essential part of their clients’ financial plans. It includes six engaging video interviews with top producers and industry professionals, seven realLIFEstories videos, samples of LIFE products and a presenter’s guide.

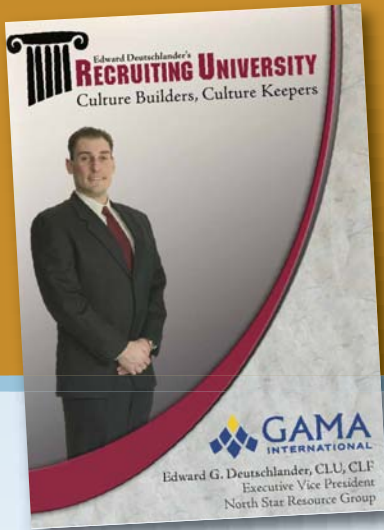
Passion for LIFE on CD

This interview series featuring five top industry leaders will inspire, motivate and make your producers proud to be in the life insurance business. Interviews include Robert Plybon, CLU ChFC, past president, MDRT, and past chair, LIFE; Charlie Epstein, CLU ChFC, Top of the Table producer; Adelia Chung, CLU ChFC, second vice president, MDRT; Csaba Sziklai, Ph.D., psychologist and sales consultant; and Brian Ashe, CLU, past president, MDRT. Each interview is approximately 12 minutes long.

Life Insurance Awareness Month (LIAM)

LIAM is an industry-wide effort coordinated by the LIFE Foundation. Each year, LIFE is joined in this educational initiative by more than 100 of the nation’s leading insurance companies and other industry groups. All share the same objective: to end the unnecessary financial suffering that so often occurs when a loved one dies.

BUILDING THE LEADERS WHO BUILD THE FINANCIAL SERVICES INDUSTRY



2901 Telestar Court, Suite 140 | Falls Church, VA 22042-1205
1-703-770-8184 | 1-800-345-2687
www.gamaweb.com