

THE TIMES GAZETTE PRESS CITIZEN EXAMINER JOURNAL TRIBUNE

NAIFA-IOWA TROUNCES COMPETITION



MAJOR AWARD

Eastern Iowa Chapter Earns Major Award

CRAIG ADAMSON, IOWA PAC CHAIR
JANUARY 13, 2021

NAIFA-Iowa picked up several major awards in 2020 –not only for “mind powers,” but for fundraising ability for ADVOCACY. Neighboring states may not have knowned that without being told about this major award.

Iowa finished 2nd nationally in 2020 for contributions to IFAPAC (Insurance and Financial Advisors Political Action Committee). Even though Iowa State beat Texas in football again this year, Texas did win the head to head battle in IFAPAC fundraising by tallying \$135,137. Whereas Iowa finished with a total of \$122,695. Leading Iowa’s charge to their highest national ranking ever were two stalwart chapters: Eastern Iowa and Quad Cities.

The Eastern Iowa Chapter, comprised of Marion, Cedar Rapids, Iowa City (and surrounding communities) made a huge push to step up their individual contributions. This effort was handsomely rewarded by finishing first in the nation in overall PAC funds raised. Of the 43 chapters eligible for the award, Eastern Iowa handily out-distanced the traditional national powers (Dallas, Atlanta, Tampa) for the top spot by several thousand dollars. Far behind in the rankings were Chicago, Houston, and Los Angeles, to name a few. Eastern Iowa also had the 2nd most

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Show Me The Money: 200+ NAIFA-Iowa Members contribute to IFAPAC in 2020 driving a 2nd Place Finish

Final Poll: NAIFA-Iowa #2

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A fifth place finish in 2019 did not sit well with NAIFA-Iowa. Finishing behind their neighbor, Nebraska, put an added sting into an already down year. Iowa’s PAC contributions hit a new high 5 years ago, but was trending downward. This was due mainly to the retirements of many active contributors. So it is natural to expect some drop-off in fundraising. However, NAIFA’s frontline work of defeating the implementation of the Fiduciary Rule ultimately had a negative effect on engagement. Many NAIFA members got complacent and took their eye off the ADVOCACY ball and stopped contributing to the PAC. So 2020 had to be different in many ways. And boy was it ever!

The State Board made an early statement of belief in ADVOCACY by making sure all board members were PAC contributors. This led several of these dedicated volunteers to dramatically increase their personal contribution levels. Current president, Dane Johnston and president-elect Mike Grandgeorge both moved up to Gold Level donors (\$1000 and above) as did Brenda Eckard (Membership Chair) and Brent Hinerichsen (Past President). In a surprise move, Randy Kruse (Membership Chair) and Craig Adamson (PAC Chair) pledged to move up to Capitol Club joining long-time board member and PAC Champion Roger McCullough of Fort Dodge. In the meantime, former National Committee Member, Dave Beaty of Cedar Valley local also joined the 2020 Capitol Club of PAC Contributors (\$5,000+).

The fundraising for 2020 really kicked off in February with the excitement surrounding the upcoming Iowa Legislative Session. Talks given by State Senator (and NAIFA member) Tim Kraayenbrink and our State Capitol lobbyist, Scott Weiser, got members fired up.

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FREEDOM TO DO BUSINESS: PAC Contributions fund Advocacy projects that protect Members and their Clients.

contributors from a local chapter behind only Dallas.

NAIFA-Iowa ADVOCACY Chair, Barry Delp, was incredibly pleased with the results of our 2020 PAC fundraising results. Part of his pride in this year's outcome was the leadership shown by his local chapter (Quad Cities) having tied for 9th for most chapter members contributing and 19th in overall fundraising. "We want more members doing less. We want more members contributing \$10 and \$25/mo. We still have a few hundred members who do not realize the huge impact small, regular contributions can make."

Delp described PAC participation with this analogy, "Iowans living along the Mississippi River anticipate certain realities of Spring rains. It's not a good idea to underestimate the impact of rising waters of the Mighty Mississippi. If you are a licensed insurance agent or registered representative you should not underestimate the impact public policy affects your business either. As a small business owner, every public relationship you have is regulated. The impact of increased regulations and pending legislative actions are not efforts that should be ignored.

Standing on the hillside hoping you will not get wet while watching other members fill and stack sandbags to protect your world is not a good action plan. New and long-time members need to stand shoulder to shoulder to protect each other. Members who missed their call to action in 2020, well that's water under the bridge. A fresh start in 2021 is available to all with no guilt. Each of our members—regardless of age and experience needs- to find a place along the wall where they can support the NAIFA-Iowa's ADVOCACY efforts to protect our entire profession and their own business."

Continued from Page 1: Final Poll

This event, known as "Day on the Hill" is NAIFA-Iowa's marquee ADVOCACY opportunity where members meet as a larger group to visit the Capitol while the Legislature is in session.

As Barry Delp and Craig Adamson were wrapping up their explanations about the importance of ADVOCACY and PAC working in tandem to promote NAIFA's agenda, members Lynn Schreder and Doug Thompson, they laid down a Donor Challenge Gauntlet by offering to match any PAC contributions from members who were there to meet our legislators in Des Moines. Schreder later in the year, upped the ante by joining the Platinum Level donor group (\$2500+).

Besides Schreder, many other NAIFA Iowa women demonstrated their PAC commitment. Leadership was provided by Char Granstra, Cindy Gleason, Barb Collins & Peg Fraser at the Gold Level. Not far behind were Sherry Horsfield, Cindy Schulte, Barb Crowley, and Jo Johnson. Though women are currently out-numbered in the NAIFA ranks they've created a strong donor group. It will be a real challenge for their male counterparts to match that intensity in 2021.

Ultimately, Iowa's forward thinking about the importance of monthly contributions helped them attain the #2 ranking in an economically challenging year due to the travel and in-person meeting restrictions related to the pandemic. State PAC chair, Craig Adamson, recognized two years ago that monthly contributions were the way of the future. "Asking our members to contribute monthly is simple. Simple for them to budget for and simple for the volunteers to collect. Our members are successful business owners. They are busy in December. And December 31st is a tax-related deadline. Plus you have the holidays. So otherwise loyal NAIFA members who believe in ADVOCACY are hard to track down. We needed a better way. Yeah, we took a small step backwards last year and took a big leap forward in 2021!"

Building influence through ongoing ADVOCACY takes time and consistency. And like it or not, it takes money. Even for Iowa Legislative races, it is not unusual for a candidate to have to raise \$25,000 to \$50,000 to compete for what amounts to a part-time job. Imagine taking time away from your family and your work to spend 6 months as a legislator each year. Then imagine having to raise money for that privilege. Yes, \$25 and \$50 donation checks do help a lot. But when NAIFA-Iowa can have hundreds of members contributing \$10 and \$25/mo it is much easier to support candidates of both parties with checks ranging from \$250 to \$500 and even \$1,000 for party leaders.

Yet another important reason for monthly contributions is to avoid problems with cash-flow for ADVOCACY ongoing efforts. Coming into the 2020 election year, it was critical that NAIFA-Iowa have the money it needed to fund candidates from both major political parties as Elder Financial Abuse, State-run Retirement Plans, Health Insurance Marketplace, and Advice Accessibility are still active policy discussions.

In January 2020, IFAPAC was ready to support all 125 races that year, contributing nearly \$50,000 to candidates. And they will do the same in 2021, knowing that non-election years are often the best time to make lasting relationships and help legislators prepare financially for their next election.

"The role of ADVOCACY is about constantly building relationships with legislators and candidates for office. And that process is a marathon, not a sprint. And who is in charge changes all that time. So you've got to be able to work with all kinds of people," R. Scott Weiser, NAIFA-Iowa Lobbyist.



Running for Office: "Building relationships in politics is just like it is for advisors meeting prospects and turning them into clients. It's a marathon, not a sprint." – R. Scott Weiser, NAIFA-Iowa Lobbyist.

RINGING THE BELL

The following NAIFA Members responded to the Call of Duty by making their year-end PAC contribution:

Tom Bice
Chad Bosch
Gregg Bosch – BRONZE
Ben Bruins
Sarah Buehler
Jordan Delp
Don Dietzenbach
Howard R. Dobson, Jr. – SILVER
Jeff Ellingson
Joby Frey – BRONZE
Michael Gaeta – GOLD
Ann Harms – BRONZE
Ben Heckart – BRONZE
Brent Hinerichsen – GOLD
Brad Jacobson
Larry Jurkens
Bob Kramer
Robert May – BRONZE
Richard McCarville – BRONZE
Jeff Olinger
Bill Perkins
John Raley – SILVER
Elizabeth Rickels-Ster – BRONZE
Kirk Sadilek - BRONZE
Kerry Schepers – BRONZE
Linda Silver
Alan Tenney – BRONZE
Dale Whiting – BRONZE
Michael Williams – BRONZE
Larry Witzel – SILVER

EXTRA MILERS

These NAIFA-Iowa members listed below made a SIGNIFICANT contribution in the month of December to put Iowa SOLIDLY into 2nd Place in the Nation:

Craig Adamson - CAPITOL
John Arons – SILVER
Jakob Bower - BRONZE
Kelly Christiansen - BRONZE
Barry Delp - GOLD
Keith Erhard – GOLD
Rhonda Fitchett
Brian Foeke - BRONZE
Mike Gary – SILVER
Mike Grandgeorge - GOLD
Sherry Horsfield – BRONZE
Jo Johnson - BRONZE
Randy Kruse – CAPITOL
Doug Marlow - SILVER
Monte Marti - BRONZE
Bert McClintock - SILVER
Mike McVicker – GOLD
Mike Nash – GOLD
Bruce Nelson - GOLD
Roger Ruden – BRONZE
Lynn Schreder - PLATINUM
Cindy Schulte – SILVER
Eric Tegrootenhuis – SILVER

A very special THANK YOU to ALL our donors. Your name may not be on this list, but you are one of 215 VIPs. You protected your business and those of your colleagues who didn't make PAC a PRIORITY. We couldn't have done this without you!

PATRIOT CLUB

Listed below are many of NAIFA-Iowa's most experienced and dedicated advisors. They know the price of vigilance is to be active in **ADVOCACY** all day, every day –even while they are worshipping, spending time with their families, meeting their clients, and running their practice. These advisors also recognize the easiest way to stay active and vigilant is by transferring the risk to protect themselves and their livelihoods by being insured thru involvement in IFAPAC:

Capitol Club (\$5,000+)

Craig Adamson*
Dave Beaty*
Randy Kruse*
Roger McCullough

Platinum Level (\$2,500+)

Marty Berger
Michele Grassley-Clarke
Barry Johnson
Anthony Schau
Lynn Schreder*

Gold Level (\$1,000+)

Ryan Bosch	Clint Hinderaker
Gabe Bowers	Brent Hinerichsen
Thomas R. Clark	Gregory Johnson
Barbara Collins	Dane Johnston
Douglas Collins	John Kneeland
Barry Delp	Lanny Kuehl
Brenda Eckard*	Mike McVicker*
Keith Erhard*	Paul Miller
Peg Fraser	Michael Nash
Michael Gaeta	Bruce Nelson
Cindy Gleason	Gregory Allen Saul
Mike Grandgeorge*	Tim Strellner
Char Granstra	Doug Thompson
Kirk Haefner	Joel Erling Twedt
Keith Hennessey	Mark Wiskus

* - Denotes increased giving level achieved.