

2004-2005 Officers

President:

Penni P. Foust, CLU, ChFC, LUTCF
336-691-3331

1st Vice President/Membership:

Martha Bradberry, CLU, ChFC, MBA
336-691-4266

2nd Vice President/Programs:

Keith S. Hiatt, CPA
336-292-6872

Secretary-Treasurer:

James M. Morgan, CLU, ChFC, CFP
336-510-5402

Immediate Past President:

D. Wayne Ford, CLU, ChFC
336-852-8455, Ext. 258

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Chapter Executive:

Patricia A. Schaaf
336-292-5088

JANUARY MONTHLY MEETING OFFERS 2 HOURS OF FREE CE, CLE, CPE CREDITS!

“2005 Legislative Update”

Date: Tuesday, January 18, 2005
Speaker: Stuart G. Tugman, CLU, ChFC, FLMI, AEP
Time: 7:30 AM – 9:00 (10:15 AM to include 2-hour CE)
Location: Starmount Forest Country Club
Cost: ***BREAKFAST AND CE FREE TO MEMBERS***
Guest Fees: Eligible for Membership-Breakfast Only \$ 0 (if first visit)
 Eligible for Membership Breakfast and CE \$ 0 (if first visit)
 Ineligible for Membership-Breakfast Only \$12
 Ineligible for Membership-Breakfast and CE \$30

(Guest payment required with registration - checks payable to SFSP Greensboro”).

**REGISTRATION MUST BE RECEIVED BY NOON ON
FRIDAY, JANUARY 14, 2005.**



The January 18, 2005 membership meeting is comprised of two hours of continuing education credit, at NO COST to you as a member! Members who do not wish to stay the entire length of the meeting can leave at the break at approximately 9:00 am, but you must be present the entire meeting to receive credit.

Stu Tugman joined the Jefferson Standard Life Insurance Company in 1963 and served in several capacities within the company. From 1997 until retirement, he served as Vice President-Field Support. He is past President of the Greensboro CLU Chapter, the Greensboro Estate Planning Council, the Board of Directors of the Greensboro Association of Life Underwriters, and a member of the Association for Advanced Life Underwriters. Stu was elected to a three-year term on the National Board of Directors of the American Society of CLU & ChFC in 1984. He was elected to the American Society Executive Committee in 1993 and served as National President in 1996-97. Don't miss this session presented by such an experienced and talented speaker!

Inclement Weather Policy:

We will cancel the monthly membership meeting if the **Guilford County Governmental Offices** are closed due to inclement weather.

JANUARY MEETING SPONSOR:

William M. O'Neil, CLU, ChFC, CFP
Pilot Financial Advisors &
Life Insurance Services, Inc.
(a member of Capitas Financial, LLC)

Upcoming:

There's Still Time to Register for the FREE Howard Wight Seminar "How to Make Bigger Sales Faster". Hurry! Seating is limited

When: Wednesday, January 19, 2005, 8:45 – 10:45 am
Breakfast 7:45 am-8:30 am, by reservation only.

Where: Sheraton Four Seasons – Joseph S. Koury Convention Center
RSVP: Pat Schaaf, Chapter Executive, at 292-5088 or email

SFSPgreensboro@triad.rr.com

www.sfsp.net/greensboro

MEMBERSHIP \$\$\$\$

Remember, members now receive a \$25 gift certificate to Friendly Shopping Center when you recruit a new member! Invite a friend to the January membership meeting!

NEXT MEMBERSHIP MEETING:

Tuesday, February 15, 2005
Doug McClenny, CPA
"Valuing the Closely Held Business"
7:30-9:00 am, Starmount Forest Country Club

Welcome New Members!

Glenn D. Capel, CFM
Merrill Lynch
(Sponsor: Mike Quinlivan)

Marie Schettino, CPA
Newby & Streck
(Sponsor: Connie Newby)

Dennis Bissell
Jefferson Pilot Financial
(Sponsor: Nathan Edwards)

Perry Moorefield
Jefferson Pilot Financial
(Sponsor: Penni Foust)

Kenneth Elder, CPA
Jefferson Pilot Financial
(Sponsor: Penni Foust)

Lin C. Ingram, CLU, ChFC
Jefferson Pilot Financial
(Sponsor: Penni Foust)

Beth Barr, CTFA
Wachovia Trust
(Sponsor: Wayne Ford)

Choco Harwell
Jefferson Pilot Financial
(Sponsor: Penni Foust)



TUESDAY, January 18, 2005 REGISTRATION Registration Deadline is Noon on Friday, January 14, 2005

Send To: Pat Schaaf
4205 Hobbs Road,
Greensboro, NC 27410

FAX: 294-1875

Email: SFSPgreensboro@triad.rr.com

JANUARY BREAKFAST MEMBERSHIP MEETING and 2-HOUR CONTINUING EDUCATION

- I will attend – Free to Members!
 I will also have the following guest(s) accompany me:
Name of Guest(s) _____

Total Cost:

Eligible for Membership-Breakfast Only	\$ 0 (if first visit)	\$ _____
Eligible for Membership Breakfast and CE	\$ 0 (if first visit)	\$ _____
Ineligible for Membership-Breakfast Only	\$12	\$ _____
Ineligible for Membership-Breakfast and CE	\$30	\$ _____
Total Amount Enclosed		\$ _____

Please make check payable to "Greensboro SFSP".

Important: Please print your name here:

X

Any time you have a change of your address, email, telephone number, or designation, please call Chapter Executive Pat Schaaf at 292-5088. Thank you.