

SOCIETY NEWS

Dallas Chapter

Visit our web site at www.SFSP.net/dallas

May 2004

AN ORGANIZATION OF RESOURCES FOR PROFESSIONALS

The Dallas Chapter of the
Society of Financial Service Professionals
cordially invites you to attend a luncheon
honoring the recipients of the

2004 GREATER DALLAS BUSINESS ETHICS AWARD

May 11, 2004 @ 11:30 a.m.

The Westin Galleria Dallas

13340 Dallas Parkway
Dallas, Texas 75240

Doors open at 11:00 a.m.

Please R.S.V.P. by May 7, 2004

President's Message

Dolly Kelton was stopped on her way to get her hair "done". Apparently she had failed to renew her car's registration. A handcuffed ride to jail certainly made for an exciting day. What makes this worth mentioning? Dolly Kelton is 97! How many of us calculate cash flow to age 97, much less include funds to cover bail!!!



Ken Dychtwald, in his classic work *Age Wave*, outlines what life will look like at age 125. He points out how critical it will be for financial advisors to make projections that will stand the test of time.

Years ago, **Al Angell, CLU, ChFC**, showed me that financial advisors can mitigate the impact of "dying too soon or living too long". The American public will demand advisors who address the life issues of quantity and quality. Easy answers and boilerplate approaches will be permanently replaced by skilled analysis and customized solutions.

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Greater Dallas Business Ethics Award Luncheon – Pre-Registration Form

Tuesday, May 11, 2004 • Westin Galleria, 13340 Dallas Parkway, Dallas, TX 75240

Name: _____ Company: _____

Address: _____

Phone: _____ FAX: _____ Email: _____

- I am a Financial Partner and my guests are listed below
- I would like to sponsor a table (\$375) and my eight guests are listed below
- I would like to purchase _____ individual seats @ \$50 each = \$ _____
- I am unable to attend. Please accept my assistance in the amount of \$ _____

*(Please print your
guests' names below)*

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____

RESERVATIONS WILL BE HELD AT THE DOOR. NO TICKETS WILL BE MAILED. • REGISTER BY MAY 7, 2004
Make checks payable to SFSP, Dallas Chapter, 9101 LBJ Freeway #450, Dallas, Texas 75243.

Announcing the 2004-2005 Dallas Chapter Board of Directors

It is with great pleasure that we announce the following have agreed to serve the Dallas Chapter as Board of Directors and Officers:

– OFFICERS –

John E. (Jay) Barnes, CLU, ChFC, REBC
President

Gary Wyatt, CPA, CLU, ChFC
President-Elect

Brian A. Wendler, CPA, ABV
Secretary/Treasurer

Brenda A. Smith, CLU, ChFC
Immediate Past President

– DIRECTORS –

James M. Coyle, RHU, REBC

Todd S. Healy, CLU, ChFC, AEP

Joshua H. Barnard, ChFC

An updated list will be sent via email within the next 1-2 weeks.

These elective positions will be voted upon by Society members present at the annual business meeting on June 2, 2004.

2003-2004 Board of Directors

President:

Brenda A. Smith, CLU, ChFC
(214) 750-0614 • brendaasmith@aol.com

President-Elect:

John E. (Jay) Barnes, CLU, ChFC, REBC
(972) 661-0101 • jay@ffgnetwork.com

Secretary/Treasurer:

Gary Wyatt, CPA, CLU, ChFC
(972) 661-1843 • gwyatt@traviswolff.com

Immediate Past President:

Joe F. Bittner, CLU, ChFC, RHU
(214) 363-7188 • jbittner@brooksbittner.com

Sections Study Groups:

(vacant)

Membership:

Jerry W. Price, CLU, ChFC
(972) 564-0808 • jerry@classicnet.net

Communications/Technology:

Peter Robbins, CPA
(214) 989-0454 • probbins@mbdworld.com

Professional Development:

Brian A. Wendler, CPA, ABV
(972) 235-6287 • bwendler@nationalbvs.com

Executive Director:

Karen H. True
(972) 404-9764 • ktrue@sbcglobal.net

Joint Networking Event with the Dallas CPA Society

June 8, 2004 • DoubleTree Club Hotel • Dallas, Texas

John E. (Jay) Barnes, CLU, ChFC, REBC

Mark your calendar for June 8 to attend a joint networking event between the Dallas Chapter of the Society of Financial Service Professionals and the Dallas CPA Society.

The event will take place at 6:00 pm at the DoubleTree Club Hotel located at 8102 LBJ Freeway, Dallas, Texas.

This networking event is sponsored by the Relations with Other Professional Organizations Committee.

The Society of Financial Service Professionals (SFSP)
Invites you and a guest to attend
one of our Sections meetings
(see schedule below)

All meetings are held at TravisWolff offices,
5580 LBJ Freeway, Suite 400, Dallas, Texas 75240

SECTIONS STUDY GROUPS

**RETIREMENT PLANS AND
COUNSELING SECTION:**

Next meets: May 18, 2004 • 8:30 - 10:30 a.m.
(Third Tuesday of odd numbered months)

Speaker: Mike Seefeld

Topic: "Important LTC Considerations for a Person
Planning Retirement"

Section Coordinator: Forrest Veal
(972) 250-6516 • vealbs@juno.com

**HEALTH AND WELFARE
BENEFITS SECTION:**

Next meets: June 9, 2004 • 9:00 - 11:00 a.m.
(Second Wednesday of even numbered months)

Speaker: To be announced

Topic: To be announced

Section Coordinator: Steve Harris
(972) 680-2777 • slhassoc@aol.com

ESTATE PLANNING SECTION:

Next meets: June 8, 2004 • 8:30 a.m.
(Second Tuesday of even numbered months)

Speaker: To be announced

Topic: To be announced

Section Coordinator: Jack McGrael
(214) 525-1066 • jack.mcgrael@nmfn.com

**BUSINESS INSURANCE AND
EXECUTIVE COMPENSATION SECTION:**

Next meets: June 18, 2004 • 8:00 - 10:00 a.m.
(Third Friday of even numbered months)

Speaker: To be announced

Topic: To be announced

Section Coordinator: Larry Burgess
(972) 404-4414 • lburgess@helmsmanfp.com

Please notify the Contact person for the Section Meeting you plan to attend

Name: _____

Name: _____

Phone: _____

Phone: _____

Email: _____

Email: _____

Check our website for updated information: www.sfsp.net/dallas



President's Message

(continued from page 1)

The questions will change somewhat as our clients look for answers to dying well in addition to living well. Retirement planning will give way to specializations in acute care and hospice. A man told me recently that the next wave will be cities who market by being "A Good Place To Die". We need to be ready to provide accurate and adequate financial advisory services.

The good news about the Dallas Chapter is that we are comprised of men and women who have paid the price to achieve and maintain the highest standards of professionalism. We will be prepared to face the challenges and provide the educational, ethical and leadership resources necessary for peak performance.

Brenda A. Smith

Brenda A. Smith, CLU, ChFC
President

THANK YOU TO THE FOLLOWING COMPANIES FOR BECOMING A 2004 SPONSOR:

Krone-Mincey
National Business Valuation Services, Inc.
TravisWolff

GDBEA LUNCHEON REMINDER – MAY 11, 2004

Cost is \$50 for Members & Non-Members

(pre-registration required – see page 1)

CHANGE OF ADDRESS FORM

Please notify us of any changes in your address, phone, fax or email.

Name: _____

Company: _____

Address: _____

Phone: _____ Fax: _____

Email: _____

Please return form by mail, fax or email:

Fax: (972) 934-1217 • Email: ktrue@sbcglobal.net

Society of Financial Service Professionals, 9101 LBJ Freeway, Suite 450, Dallas, Texas 75243