

# SOCIETY NEWS

Dallas Chapter

Visit our web site at [www.SFSP.net/dallas](http://www.SFSP.net/dallas)

March 2004

AN ORGANIZATION OF RESOURCES FOR PROFESSIONALS

## March Breakfast Meeting

Wednesday, March 3, 2004

Park City Club

5956 Sherry Lane Place, 17th Floor

7:30 a.m. - 9:30 a.m.



Featuring:

**Regen Fearon**

**"Growing Leadership:  
The Past, Present and Future  
of Leaders for Dallas"**

Regen is a Dallas native, a graduate of The Hockaday School, Yale University and the University of North Texas. A former teacher, school counselor and school head, Regen spends most of her time now focused upon community involvement. She has held or currently holds leadership roles with The Dallas Assembly, The Hockaday School Board of Trustees and its Capital Campaign Committee, Dallas County Community College District Foundation, Tate Lecture Series at SMU, Junior League of Dallas, as well as Planned Parenthood of North Texas. She is an Honorary Life Member of The Child Care Group having served as chair of its Board. She serves as an Advisor to the boards of numerous local and statewide organizations. She is a repeat speaker at the Community Board Institute and at the Junior League of Dallas, as well as having consulted with a variety of non-profit boards in Dallas.

In addition to her work in the community, Regen is the founder of a small business, The Institute for Interesting People, a forum for lectures and discussions. She manages the charitable contributions for the Horchow Family Charitable Trust and is the mother of 11 year old Samantha Pillsbury, 21 month old Fiona and Sabrina Fearon, and is married to craniofacial surgeon, Jeff Fearon.

Based upon her April 2003 Op-Ed piece for the *Dallas Morning News*, Regen will elaborate on how Dallas has been led and what she sees as the needs for the future of leadership for our city.

## President's Message

FREE Publicity! Intriguing idea, isn't it? Emmy Award Winning reporter, Jeff Crilley, from Dallas has written a book with that title. His years of media experience and exposure have given him vantage point advantage. What does this have to do with the Dallas Chapter of SFSP? Quite a lot, actually. For one of his chapters is entitled "Becoming An Expert". He gives illustrations of men and women who have looked at their business and personal lives and found areas of expertise that can be translated into professional success. Sounds like the seminars in niche marketing that rolled through years ago, doesn't it? But there is a twist – YOU DON'T HAVE TO FAKE IT UNTIL YOU MAKE IT! Your professional credentials, your years of experience, your commitment to ethics and leadership, and your dedication to the high road of financial services equips you to stand apart from the thousands of others who just want to look like the real deal.



This month I would like to focus on the value of self-promotion. Let me share a few quotes from Crilley's book. "Opportunity for free publicity is banging at your door every day, but most of us aren't listening for it. Read the paper, watch TV news, and listen to the radio. Are they talking about something that you know a lot about? Call in and offer your 'expert' advice. Let's say it's tax season, and you're an accountant. Tell the stations you'd like to help with a segment called 'The Top Ten Things Most People Forget to Deduct'. They'll probably take you up on it because most accountants only want publicity when they have time (i.e. after tax season when the media isn't interested!) Use your expertise for free publicity. Be available. Reporters are lazy. We'll go back to the same sources over and over again as long as they deliver. Jump on items that are in the news. The media will be more excited to talk to you if you're trying to lend your expert help to a story they are already working on."

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*Brenda A. Smith*

**Brenda A. Smith, CLU, ChFC**  
President

**We wish to thank our sponsor of the Beverly L. Brooks Leadership Award:**

**KRONEY•MINCEY**

12221 Merrit Drive • Suite 1210 • Dallas, Texas 75251 • (972) 386-8500

## 2003-2004 Board of Directors

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(vacant)

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(972) 235-6287 • bwendler@nationalbvs.com

### Executive Director:

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

## SFSP Dallas Chapter 2004 Sponsorship Opportunities

Brian A. Wendler, CPA, ABV

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

#### **Krone-Mincey National Business Valuation Services, Inc. TravisWolff**

Established in 1937, the Dallas Chapter of the Society of Financial Service Professionals is grounded on three foundational principles: professional development, ethics and leadership. Membership is comprised of men and women with professional degrees and designations including CEBS, CFP, ChFC, CLF, CLU, CPA, JD, MSFS, MSM, REBC and RHU. The chapter hosts general membership meetings featuring expert speakers and timely topics. Professional development is fostered through our unique system of specialized study groups (sections) for practitioners in areas of estate planning, retirement plans/counseling, health/welfare benefits, and leadership and business/executive compensation.

Sponsorship of the Dallas Chapter creates visibility and presence for you. We would be most pleased and proud to partner with you during the 2003-2004 chapter year.

### SPONSORSHIP: \$500

### BENEFITS:

- 1 Breakfast Meeting sponsorship •
- 1 Website listing with link •
- Recognition at all Breakfast Meetings •
- Recognition in all monthly e-letters •

For further information, please contact **Brian A. Wendler**  
at (972) 235-6287, Fax (214) 291-1635, email: bwendler@nationalbvs.com

## 2004 Calendar of Events

Wednesday, March 3, 2004 – Breakfast Meeting  
**Beverly L. Brooks Leadership Award Presentation plus  
Regen Fearon, "Growing Leadership: The Past, Present and  
Future of Leaders for Dallas"**

Wednesday, April 7, 2004 – Breakfast Meeting  
**Presented by Retirement Plans & Counseling Section  
Tom Clark, Social Security Public Affairs Specialist –  
Social Security presentation with Q&A**

Tuesday, May 11, 2004  
**Greater Dallas Business Ethics Award**  
Westin Galleria (see page 3)

Wednesday, June 2, 2004 – Breakfast Meeting  
**Town Hall Meeting**

*\*All breakfast meetings are at Park City Club – 7:30 a.m.  
except GDBEA*

# Top Ten Reasons Why You Should Participate in the GREATER DALLAS BUSINESS ETHICS AWARD

Larry W. Burgess, CLU, ChFC, CFP



- #10 Because **it is a good thing to recognize and applaud companies** that uphold high standards of business ethics and corporate responsibility .
- #9 Because **it is good to recognize the people** that lead companies that have high standards of business ethics and corporate responsibility.
- #8 Because **it encourages others to follow the example** of those who uphold high standards of business ethics and corporate responsibility.
- #7 Because Dallas has lots of examples of companies with high standards and **the public needs to know that most companies and their employees try to be fair and honorable in their business dealings.**
- #6 Because **it is good for the health of a company** to set and adhere to high standards, and companies with high standards have better longevity and make more money.
- #5 Because **it is good for your relationship with your nominated company** to promote their high standards of business ethics and corporate responsibility.
- #4 Because **your own commitment to business ethics and public responsibility is demonstrated** by your association with this event.
- #3 Because **you will grow in your commitment to high standards** by your involvement with this program.
- #2 Because **our profession is under fire in the media, and the public needs to know that we promote high standards** of business ethics and corporate responsibility.
- #1 Because **our professional association will be recognized and identified with the promotion of high standards** of business ethics and corporate responsibility.

*“Applying for the Business Ethics Award provided our company with tremendous value. The process itself helped us grow and clarify our own situation and position. I would recommend that any company considering itself of high ethical standards invest the time to apply for the Business Ethics Award – it’s well worth the effort!”*

*Cynthia Driskill, CEO – CDG & Associates  
2001 winner in small business category*

## 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: \_\_\_\_\_

\_\_\_ guests @ \$50 each = \$ \_\_\_\_\_       \$375 – Table of 8      *(Please list all attendees below)*

Name: \_\_\_\_\_ Name: \_\_\_\_\_

Name: \_\_\_\_\_ Name: \_\_\_\_\_

Name: \_\_\_\_\_ Name: \_\_\_\_\_

Name: \_\_\_\_\_ Name: \_\_\_\_\_

**Make checks payable to SFSP, Dallas Chapter, 9101 LBJ Freeway #450, Dallas, Texas 75243.**

**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:** March 16, 2004 • 8:30 - 10:30 a.m.  
*(Third Tuesday of odd numbered months)*

**Speaker:** Marvin S. King, CLU, ChFC, CFP, AEP

**Topic:** When Is the Best Time to Take Qualified  
Money?

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

**ESTATE PLANNING SECTION:**

**Next meets:** April 13, 2004 • 8:30 - 10:00 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

**HEALTH AND WELFARE  
BENEFITS SECTION:**

**Next meets:** April 14, 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

**BUSINESS INSURANCE AND  
EXECUTIVE COMPENSATION SECTION:**

**Next meets:** April 16, 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](http://www.sfsp.net/dallas)



## President's Message

*(continued from page 1)*

You, our members, have more unique qualifications to be seen as the resident expert of most professional organizations in this area. Our chapter, as well, should be recognized as the home for men and women of unparalleled professional character and experience. But this won't happen just because we think we deserve it. It will happen because we do the work and strategically plan for results. So, what areas of local or regional involvement should your SFSP board be considering for name recognition? Where can we best serve you as our constituency? How do we become the organization of choice for experts in the fields of executive compensation, group benefits, business insurance, qualified plans, estate planning, insurance counseling and money management? How do we become known as the place to be for these experts?

I would greatly appreciate your feedback. Send your thoughts and comments to [Brenda@breakfastwithfred.com](mailto:Brenda@breakfastwithfred.com).

Mark your calendar for the March meeting. We are spotlighting our very best. We will be giving the **Beverly L. Brooks Leadership Award** to a worthy member who has a distinguished career in financial services, community leadership while upholding the finest ethical standards. **Regen Fearon** will be our speaker. Don't miss the opportunity to share this experience.

### **BREAKFAST MEETING REMINDER – MARCH 3, 2004**

**Cost is \$25 at the Door for Members & Non-Members**

*(no pre-registration required)*

### **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](mailto:ktrue@sbcglobal.net)

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