



*2023 NAIFA-Texas*

# ANNUAL STATE CONFERENCE

*& Day at the Capitol*



**FEBRUARY 21 - 23, 2023**

DoubleTree Suites by Hilton Austin  
303 West 15th Street, Austin, Texas 78701



# PRESIDENT'S MESSAGE



Welcome to the 2023 NAIFA Texas conference. I want to thank all of you for attending and hope you have a great time at the conference.

This year's conference theme is "Advocating for Our Clients and Ourselves." We will be kicking off the conference with some fantastic speakers and that theme will continue through the rest of the week. Starting today you will learn tips and tricks you can take with you back to your practice, to your community, to your family and implement.

The questions I would like you to think about as we go through this week are:

- How can I use my voice?
- What can I implement Friday, Monday, in a month?
- Who is not here and needs to hear these messages?
- How can I take that next step?
- What Help do I need for that step?
- Whom can I help take the next step?

As an organization, you are the lifeblood of what we do. The theme for the year is growing NAIFA Texas proactively. How we do that is vital. I see my role simply as a steward, in less than a year I will be back in the ranks but will continue to do my part to help this organization as I'm needed. I think about all the great leaders that have helped me, Tom Currey, Doug Massey, Chris Hatton, Joseph Orr, Ron Mullen, Dick Kuriger, Mark Warren, Alan Carl, Danny O'Connell, Andra Grava, Joey Ussery, Ted Erck, Karen Easterling and more that I have not mentioned. Everyone is responsible for lifting and challenging my thought processes, so thank you for that. I hope I can continue to provide that stewardship to others.

We are all in this together, and hopefully, we all can grow and take things away this week. Thus, enjoy, learn, network, and walk away with something that will help you take that next step whether it be personal, professional, and/or spiritual.

Thank you for attending.

**Rodney Mogen, DBA, MBA, CRPC, AAMS, CAM**  
*2023 NAIFA-Texas President*



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To learn more about the 2023 Board of Directors,  
please visit: [tx.naifa.org/board](https://tx.naifa.org/board) or Scan the QR code!



# CONFERENCE AGENDA

*Tuesday, February 21, 2023*

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## **8:30 AM - 2:30 PM**

Final 2022-2023 NAIFA-Texas LILI Class | Jason Talley, LUTCF

The NAIFA Leadership in Life Institute is a six-month in-person program offered exclusively to NAIFA members who are committed to growing intellectually and professionally through deep introspection and discussion

## **9:00 AM - 2:30 PM**

LILI Alumni Summit | Karen Easterling

The LILI Alumni Summit is an invite-only event, exclusively for those members who have graduated from the LILI Course in past years

## **11:00 AM - 1:00 PM**

NAIFA-Texas Board Meeting

This meeting is exclusive to the 2023 NAIFA-Texas Board of Directors

## **12:00 PM - 2:30 PM**

Registration & Exhibitor Visits

## **1:30 PM - 2:30 PM**

NAIFA-Texas Past President's Reception

This meeting is exclusive to NAIFA-Texas Past Presidents

## **2:30 PM - 2:45 PM**

Welcome | 2023 NAIFA-Texas President, Rodney Mogen, DBA, MBA, CRPC, AAMS, CAM

## **2:45 PM - 3:15 PM**

NAIFA National President | Bryon Holz

Induction of 2023 NAIFA-Texas Board of Directors

## **3:15 PM - 4:15 PM**

Planning for College 2023 | Annmarie Hatfield & Mike Davila

## **4:15 PM - 4:30 PM**

Refreshment Break & Exhibitor Visits

## **4:30 PM - 5:15 PM**

Prospering In a Post-COVID World | Joe Jordan

## **5:30 PM - 7:00 PM**

Welcome Reception

Special thanks to our Reception Sponsors, Four Oaks and Illinois Mutual

## **7:00 PM - 8:00 PM**

2022-2023 Leadership in Life Institute (LILI) Graduation Ceremony

## **8:00 PM**

Dinner on Your Own



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# CONFERENCE AGENDA

*Wednesday, February 22, 2023*

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## **8:00 AM - 8:30 AM**

Breakfast & Exhibitor Visits

Special thanks to our Breakfast Sponsor, ACLI

## **8:30 AM - 8:45 AM**

Morning Welcome & Recap | Joey Ussery, CLU, ChFC, LUTCF

## **8:45 AM - 9:30 AM**

Liar, Liar Pants on Fire | Traci Brown

## **9:30 AM - 10:00 AM**

Update from the Texas Department of Insurance (TDI) on their 2023 Legislative Priorities | Insurance Commissioner Cassie Brown

## **10:00 AM - 10:30 AM**

Legislative Briefing | NAIFA-Texas Government Relations Committee Chair Jason Talley & NAIFA-Texas Lobbyist Elizabeth Hadley

## **10:30 AM - 5:00 PM**

Capitol Building Visits with Legislators

Attendees are responsible for their own lunch

## **5:00 PM - 5:30 PM**

Break

## **5:30 PM - 6:30 PM**

Legislative Reception

Special thanks to our Reception Sponsor, MassMutual

## **6:30 PM - 8:30 PM**

Texas Leaders Round Table (TLRT) Dinner

This dinner is exclusive to TLRT members only. We will be joined by guest speaker, Ed Deutschlander with North Star Resource Group.

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# CONFERENCE AGENDA

*Thursday, February 23, 2023*

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## **8:00 AM - 8:30 AM**

Breakfast & Exhibitor Visits

## **8:30 AM - 8:45 AM**

Morning Welcome & Recap | Joey Ussery, CLU, ChFC, LUTCF

## **8:45 AM - 9:45 AM**

Living a Balanced Life as an Advisor | Dr. Travis Parry

## **9:45 AM - 10:45 AM**

Advocating for Our Clients and Ourselves | Holly Hoffman

## **10:45 AM - 11:00 AM**

Refreshment Break & Exhibitor Visits

## **11:00 AM - 11:30 AM**

NAIFA-Texas Annual Business Meeting

NAIFA-Texas Members are highly encouraged to attend and participate in this meeting.

## **11:30 AM - 12:30 PM**

Awards Luncheon

Join us as we recognize recipients of the NAIFA-Texas Young Advisor Team (YAT) Leader of the Year Award, Local Leader of the Year Award, Bruce Murray Tall Texan Award and our most prestigious award, the Lifetime Achievement Award.

## **12:30 PM**

Closing Remarks | 2023 NAIFA-Texas President, Rodney Mogen, DBA, MBA, CRPC, AAMS, CAM

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# YOU NEVER FORGET YOUR FIRST TIME: ROCKING YOUR PROFESSION AS A NAIFA MEMBER

*Bryon Holz*

**Tuesday, February 21, 2023**

**2:45 PM - 3:15 PM**

NAIFA National 2023 President Bryon Holz will share in intimate detail about some of his “first times”, both personal and professional, revealing the true value of what we do as professionals and as NAIFA members.



## **Bryon Holz**

**2023 NAIFA National President**

Bryon and his team of associates in Tampa Bay, Florida have been building brighter tomorrows for their clients since 1983, specializing in asset protection, income planning and wealth conservation strategies. Their firm's approach to financial services is based on the principle that the customer's needs should always come first.

A business graduate and Presidential Scholar of the University of Tampa, and graduate of the Professional Management Institute in Insurance Marketing Management at Purdue University, Bryon has complimented his industry education with numerous designations, certifications and credentials including CLU, ChFC, LUTCF, CASL and LACP.

Holz has served in leadership on various professional boards including as NAIFA local, state and now national president. He was humbled to receive both his local and state association's distinguished service awards, and blessed to be both a graduate and two-time moderator of NAIFA's prestigious Leadership in Life Institute (LILI).

A life, qualifying and Top of the Table member of the Million Dollar Round Table, Bryon is a regular industry columnist and global speaker, including several MDRT main platform presentations.

Holz believes in serving his community and paying it forward, and actively supports numerous civic and charitable causes including Instruments of Change, Epilepsy Services Foundation, Scouting, and the Nativity Food Bank among many others.

An avid traveler, photographer, and social media user, Bryon's passions include his faith, family, profession, and especially music. He supports diversity, equity and inclusion in his profession and is a supporting member of Women in Financial Services.



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# PLANNING FOR COLLEGE 2023: HELPING YOUR CLIENTS NAVIGATE THE CRAZY ROAD TO COLLEGE

*Annmarie Hatfield and Mike Davila*

**Tuesday, February 21, 2023**

**3:15 PM - 4:15 PM**

This session will focus on College Planning and helping your clients navigate the crazy road to college. Learn what it takes to find the right college fit at the right tuition price. Get answers to frequently asked college admissions questions:

- How is COVID-19 affecting college?
- Can we afford college?
- What colleges are looking for?
- How do we apply for Financial aid?
- How do we find scholarships?
- Are we already behind in the college search?
- Is the SAT/ACT optional?
- And many more!



**Annmarie Hatfield**  
College InRoads | Partner

Annmarie Hatfield is one of two Partners at College InRoads and focuses on Sales & Marketing. She spends extensive time networking in the business community and in educating parents and students about the complex process of college planning.

Annmarie lives in Austin, TX (in the Lakeway area) with her husband Christopher (and their cat Sugar) and has 2 stepchildren. She is the Past Chairwoman of the Board of Directors for the Lake Travis Chamber of Commerce and serves on the Boards of Directors for both the Lake Travis Education Foundation and the University of Texas Ex Students Association – Austin Chapter.



**Mike Davila**  
College InRoads | Partner

Mike is a 1994 graduate from the U.S. Naval Academy in Annapolis, Maryland. After graduation, he served on active duty as a surface warfare officer for 6.5 years. His tours of duty included time aboard a guided missile cruiser, an aircraft carrier, and a final tour of duty on faculty at Annapolis teaching Naval Strategy and Tactics.

He left active duty in 2000, and is the founder of College Inroads, LLC, an education consulting firm based in Austin, Texas. He is a member of the Higher Education Consultants of America (HECA), and National Association of College Admissions Counselors (NACAC), and The National Collegiate Advocacy Group (NCAG) a 501(c)3 organization based in New York.





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# PROSPERING IN A POST-COVID WORLD

*Joe Jordan*

**Tuesday, February 21, 2023**

**4:30 PM - 5:15 PM**

This session will highlight the importance of having the right mindset while dealing with COVID and its aftermath, the power of gratitude, and products that were made for markets like this. Joe Jordan will focus on the Pillars of Living a Significant Life as well as the Six Retirement Risks:

- Longevity
- Marketing and Interest Rate Risk
- Withdrawal Rate Risk
- Sequence of Return Risk
- Purchasing Power Risk
- Health Risks



## **Joe Jordan** Inspirational Speaker

Joe Jordan, inspirational speaker and behavioral finance expert, is the author of the award-winning book *Living a Life of Significance*. The book has sold over 125,000 copies, is translated in five languages and was featured in Nick Murray's "The Advisor's Essential Library." He has given hundreds of presentations to over 400,000 financial professionals in 28 countries around the world.

Formerly, Joe ran insurance sales at Paine Webber and more recently was a senior vice president at MetLife. He was responsible for retail product development and started their fee-based financial planning program and behavioral finance department.

Joe is also a founder of the Insured Retirement Institute and has been featured on the cover of *Life Insurance Selling* magazine.

For three consecutive years, he has been honored by *Irish America* magazine as one of the "Top 50 Irish Americans on Wall Street."

He was inducted into the Fordham Football Hall of Fame and has played rugby for the New York Athletic Club for 30 years.



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# LIAR, LIAR PANTS ON FIRE

*Traci Brown*

**Wednesday, February 22, 2023**

**8:45 AM - 9:30 AM**

Learn to read fraudsters like a book with renowned body language expert Traci Brown. Discover how to win the game of 'Two Truths and a Lie' you play every day with clients, boss, your team and prospects. Protect your company's hard-earned profits and catch would-be fraudsters before they can take away everything.

TIME Magazine has named Traci Brown one of the nation's top deception detection experts. She's trained alongside our country's top law enforcement. Ms. Brown is a frequent television guest and is the author of *How to Detect Lies, Fraud and Identity Theft*. Her Fraud Spotting Learning Platform has helped companies stop millions in fraud loss. She is currently ranked the #5 body language expert in the world.



## **Traci Brown**

### **Fraud-Busting Body Language Expert**

Traci can help your team reveal the secrets your clients are keeping from you. Secrets that are impacting your bottom line. Traci is trained in the body language of deception detection, right alongside our country's top law enforcement. In her fast paced, interactive keynotes that are sure to entertain, Traci teaches the lie, fraud and identity theft detection skills she's used to get to the truth in billion dollar business deals, crimes and politics.

You'll be able to immediately use the same tools to tell whose pants are on fire, stop fraud, and create more success in your own organization and personal life so you see more zeroes (before the decimal) in your bank account.

Traci is ranked the 5 body language expert in the world for 2022. She is a past president of the National Speaker's Association Colorado Chapter and the author of four books including her latest *How to Detect Lies, Fraud and Identity Theft*. She is also the Executive Producer of a new TV series *Truth, Lies and Coverups*. Traci earned her Certified Speaking Professional designation in 2020. Woohoo!!

Traci also holds a degree in business from the University of Colorado, and is a Three Time US Collegiate Cycling Champion and former member of Team USA. She is a certified master practitioner of Neuro Linguistics, Hypnosis, and Hawaiian Huna.





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## ABOUT THE LILI CURRICULUM

The NAIFA Leadership in Life Institute is a six-month in-person program offered exclusively to NAIFA members who are committed to growing intellectually and professionally through deep introspection and discussion. The intense curriculum creates a unique learning environment that encourages participants to bring out the best in themselves and apply what is learned across every aspect of their lives.



LILI is an incredible experience that every leader should participate in. I learned so much about myself, and have been leaning back on valuable lessons learned in LILI ever since I went through the program. It not only has helped me in my business but also in my personal life. I'm so grateful for that experience and will treasure it always.

**Bailey Baker**

San Antonio, TX

LOYAL MEMBER SINCE 2019

### Quick Facts:

- Six in-person sessions over the course of six months
- Required assignments to engage in discussions during each session
- Apply LILI principals in everyday life to grow intellectually and professionally

To learn more, please visit: [tdc.naifa.org/lili](https://tdc.naifa.org/lili)



## UPCOMING EVENTS

*Around the State*

Stay connected with NAIFA members across the state of Texas by attending in-person and virtual events in 2023.

[tx.naifa.org/state-event-calendar](https://tx.naifa.org/state-event-calendar)



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# LIVING A BALANCED LIFE AS AN ADVISOR

*Dr. Travis Parry*

**Thursday, February 23, 2023**

**8:45 AM - 9:45 AM**

Financial advisory firm owners are prone to being workaholics 5 times more than the average American. Unfortunately, society and even time management experts have perpetuated 3 time management myths that can keep you stuck in the workaholic trap. Learn the truth behind these myths and how the Make Time Method can help you save dozens of hours at work so you can re-invest it into a higher quality personal life.



## **Travis Parry**

**International Speaker, Author, Podcast Host**

Dr. Travis Parry's professional journey started in 2002 as a new financial advisor. He found a natural market with business owners and young married professionals. As his practice was building, he noticed that many of his clients needed more than financial advice, they needed advice about life in general. There were many clients who were unhappy in their careers, relationships, and overall health. He was unable, as a financial advisor, give much more than financial planning advice. However, he had a desire to do more.

He attended multiple trainings and invested heavily in his own personal development. In one of these training sessions, the speaker put a challenge to the crowd that if they wanted to be on this stage to make the changes they needed. He knew that the speaker was speaking to him so he started to figure out the changes that he needed in order to live his life on purpose and help clients with more than their financial aspects of life. He now speaks and coaches business owners and self-employed individuals to make time work for them so they can achieve their goals and he is the founder of the Make Time Institute.

He obtained a Masters degree in Psychology and a Doctorate in Family and Human Development.

He is currently working on a book entitled "Achieving Balance: Make Time to Reach Your Business and Personal Goals" which hit #1 on Amazon's Bestseller List.

When he is not working hard, he is spending time with his family. His wife and he met and married over 15 years ago. They enjoy time together outside enjoying nature and sports, working on their home, vacationing alone, and serving in their community. As homeschooling parents of 6 children, they stay busy with education both inside and outside the home. Their family vacations are often associated with learning and understanding of the world that we live in.

When he is not spending time with his wife and children, he is serving in his church and finding solace in playing the guitar. He jumps at the chance to play volleyball and soccer, and he has also dabbled in triathlons and distance running and hopes to one day create a couples only triathlon with his wife.





## NAIFA Quality Award

The NAIFA Quality Award provides advisors at any career stage the opportunity to demonstrate a commitment to excellence. This includes:

- Professionalism through education and earned designations
- Production measured by performance metrics customized for each practice specialty
- Adherence to the NAIFA code of ethics, and
- Service to your industry association

Advisors specializing in Life & Annuities, Financial Advising & Investments, Health & Employee Benefits, Multiline Sales, or any combination of these specialties have the opportunity to demonstrate the quality that is the mark of a true professional. NAIFA-Texas is proud to share the 2022 NAIFA Quality Award recipients selected from the state of Texas. To learn more about this award, please visit: <https://tdc.naifa.org/nqa>.



To view the list of  
2022 NAIFA-Texas Quality Award Recipients,  
please visit: [tx.naifa.org/history](https://tx.naifa.org/history) or Scan the QR code!



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# ADVOCATING FOR OUR CLIENTS AND OURSELVES

Holly Hoffman

**Thursday, February 23, 2023**

**9:45 AM - 10:45 AM**

As we survive life's challenges, we come face to face with fear and uncertainty. Challenges may allow us to step out of our comfort-zone to push ourselves beyond our own self-limitations. How we choose to overcome a challenge is what makes us stand apart. Our strength in times of difficulty prove our character and self-worth.

As Holly share's her experience of being on a reality show, she will encourage you to think about how you might decide to survive daily. Holly will inspire you to think about six words to develop your survival skills. With Holly's six simple words, you will be able to take on any challenge with which you are faced. Adversity is not so much contending with problems as it is learning more about who you really are, and what is inside of you.



## Holly Hoffman

Professional Speaker and Author

*"Nobody can go back and start a new beginning, but anyone can start today and make a new ending." - Marie Robinson*

Holly Hoffman was the last remaining member of the Espada Tribe and the last woman standing on Season 21 of CBS' hit reality show "Survivor Nicaragua". Through that experience, and others throughout her life, Holly was inspired to share her message of survival.

A professional motivational speaker and the author of *Your Winner Within* and *Write Yourself a Note*, Holly acknowledges that life is made up of challenges, and we are oftentimes faced with situations that seem insurmountable. Within each of us is an ability to focus our thoughts, emotions, and energy to succeed. If only we have the knowledge, tools, and discipline to do so.

A native of South Dakota, Holly's writing and speaking not only offer encouragement and optimism but a roadmap for self-discovery and spiritual enlightenment. Readers and audience members alike walk away inspired to light the fire of successful living within themselves.

Today, Holly is a recipient of the Certified Speaking Professional designation, and travels across the country and internationally, speaking to a wide variety of corporations, associations, universities, schools and women's organizations. Holly inspires her audiences to take opportunities and focus on faith, attitude, determination, confidence, desire and perseverance.





## What is TLRT?

The Texas Leaders Round Table (TLRT) is a gathering of leaders, for leaders. From all corners of the state, Texas's top producers get together to network, share sales ideas, and hear presentations from Million Dollar Round Table-quality speakers.

To learn more and become a 2023 member, visit:  
[tx.naifa.org/texas-leaders-round-table](https://tx.naifa.org/texas-leaders-round-table)



## 2023 Texas Leaders Round Table (TLRT) Members

Lel Arandela, LUTCF, ChFC, CLU, CASL

Roland Barrera

Mickey Batsell, CLU, CLTC, CASL, CSA, FLMI, MBA

Dee Carter, CLU, ChFC, RFC

Daniel Drabinski, CFA, MSFS, AEP, CEPA, CMT, CFBS, CLTC, CAP, RICP

Kim Drewry

Karen Easterling

Mike Evans, CLU, ChFC, LUTCF

Hollie Gandy Donohue, CSA, CSLTC

Andra Grava, CLU, ChFC

Michele Guzman, RICP

Mark Jones

Joe Neal Kerr

Richard Kuriger III, CLU, ChFC, MSFS, CIC, CFP, AEP

Thomas "Les" Littleton, CLU, LUTCF

David Martinez

Charlie Matejowsky, LUTCF, CIC

Rodney Mogen, DBA, DFP, CRPD, CCS, AAMS, LACP, LUTCF

Mark Olson, CFP, MSFS, CLU, ChFC, LUTCF, AIF

Lesley Pinckard

Melissa Pursley, LUTCF, RICP

Durr Sexton, CLU

James Thompson

Derek True, DIA, DHP

Joey Ussery, CLU, ChFC, LUTCF

Mark Warren, LUTCF

John W. Wheeler Jr., CFP, CLU, ChFC, CRPC, LUTCF, LACP, CLTC

This list shows TLRT members as of February 1, 2023

To view the most up to date list of TLRT members, please visit: [tx.naifa.org/texas-leaders-round-table-members](https://tx.naifa.org/texas-leaders-round-table-members)

# LOCAL LEADER OF THE YEAR AWARD

The NAIFA-Texas Local Leader of the Year Award recognizes an advisor's commitment to NAIFA including service on local Chapter and/or Affiliate leadership involvement and positively impact the insurance and financial services industries.

The NAIFA-Texas Board of Directors is proud to announce the first recipient of the Local Leader of the Year Award, Lel Arandela, LUTCF, ChFC, CLU, CHFC, with Eagle Strategies and New York Life Insurance Company.



## **Lel Arandela, LUTCF, ChFC, CLU, CHFC** Eagle Strategies and New York Life Insurance Company | Financial Advisor

Lel Arandela has more than 25 years of experience in the financial services business helping people, especially in the medical profession for their family and business protection, wealth accumulation, and asset distribution. She earned 4 designations (LUTCF, ChFC, CLU, CASL) to enhance her service to her clients. A multi-awarded Agent/Registered Representative of New York Life, an Eagle Adviser, MDRT, and WIFS member. She was NAIFA President of the Corpus Christi Chapter for 2 terms and continues to be the Leader of the NAIFA Corpus Christi Affiliate to date.

Her community engagement revolves around the Coastal Bend Filipino American Association for which she has been the President for 15 years to date. Members regard her as the President for Life. Giving balance to her life is her church commitment to being an Elder and the Clerk of Session for more than 20 years.

Lel is a mom to 4 Professional young men who are now able to choose their own career path and paddle their own canoe. She was recognized as one of the YWCA honorees for the 2016 Y Women in Career for Financial Services and became one of the Y Board of Directors for 3 years.

She mentors several new Agents and shares business in the process. Lel considers her NYLIC career as second to none.





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## NAIFA-TEXAS PAC

The NAIFA-Texas PAC, other state IFAPACs and the NAIFAPAC contribute approximately \$2.5 million to federal and state candidates and committees each election cycle. An important aspect of our work in this industry is through PAC. Being able to contribute to those who understand our association's priorities is crucial. Please remember to develop relationships with your legislators and let us know of those connections!



NAIFA-Texas PAC is the backbone of our advocacy efforts in the Texas State Capitol. Through the PAC, we form and maintain relationships with state legislators, ensuring we have a seat at the table when issues arise that affect our members and their business. Our PAC funds go directly to supporting candidates and hosting advocacy events for our members. We go above and beyond to give our members opportunities to have open dialogues with their legislators and ensure their interests are being protected. At the end of the day, NAIFA-Texas PAC carries weight in our industry and fights for our members.



Visit [tx.naifa.org/ifapac](https://tx.naifa.org/ifapac)  
or Scan the QR code to learn more!

# YOUNG ADVISOR TEAM LEADER (YAT) OF THE YEAR AWARD



The NAIFA-Texas YAT Leader of the Year Award recognizes an advisor's commitment to NAIFA including service on local and state and committees as well as participation in the Leadership in Life Institute (LILI); involvement with state and/or federal legislative efforts; participation in external service work such as charities; and an ability to inspire others.

The NAIFA-Texas Board of Directors is proud to announce this year's recipient of the NAIFA-Texas YAT Leader of the Year Award, David Tucker, RICP with Cadence Wealth.

*This award is not associated with the YAT Leader of the Year Award that is presented at the national level. Nominations for the NAIFA National YAT Leader of the Year Award open each year during the "I Love NAIFA Month" (February). To learn more please visit, <https://tdc.naifa.org/yat>*



## David Tucker, RICP

Cadence Wealth Management | Financial Advisor

A San Antonio native, David has proudly called Austin home since starting his financial services career in 2013. He has a passion for helping others and a "give first" philosophy that he generously shares with his clients and his community. Through advanced coursework, David has earned the designation of Retirement Income Certified Professional®. With this knowledge, he helps his clients navigate the complexities of managing a retirement distribution plan as they transition into the retirement phase of life.

David has been a NAIFA Member since 2015. He has served on the local board in Austin in several roles, including Chair of the Austin Affiliate in 2021 and became a LILI Grad in 2018. Having the opportunity to travel with NAIFA to multiple Congressional & State Conferences, David holds a deep appreciation for the critical work that our organization does on behalf of our industry and those that we serve.

David is a dedicated Rotarian, holding multiple positions in the Austin Cosmopolitan Rotary Club. He participates in numerous community service projects every year and actively seeks new and better ways to serve his local and global community. David enjoys visiting National Parks around the country and traveling abroad to see the world with his fiancée Allysa.



# BRUCE MURRAY TALL TEXAN AWARD

NAIFA Great Southwest (GSW) historically honored a member for outstanding contributions to the association. This award is named in honor of Bruce Murray, one of NAIFA GSW's most faithful and long-serving members. NAIFA-Texas continues this long-standing tradition by presenting this award in homage to Bruce and NAIFA Great Southwest. The criteria for this award focus on issues that were important to Bruce and involved association members. The considerations focus on PAC involvement, political involvement, and local participation.

The NAIFA-Texas Board of Directors is proud to announce this year's recipient, Frank Correa, LUTCF, FSCP.



## **Frank Correa, LUTCF, FSCP** TransAmerica Agency Network | Agency Manager

Frank Correa has served the community of Dallas/Ft. Worth for 39 years by protecting families and loved one with Insurance and Financial Services. After graduating from Pan American University in Edinburg, Tx. he was offered a position with Allstate Insurance Co as an underwriter. A year later he became an Insurance Agent and started that journey in Hurst, Tx.

For the last 37 years, he had two agencies with Allstate one in Grapevine, TX., and the second in Granbury. He achieved the highest awards and trips for the top agents with Allstate. He achieved Honor Ring 19 times, National Conference 10 times, and Chairman and Inner Circle. In 2019, he sold his Allstate practice, traveled with family for the next 2 years, and in 2021 was asked to help build an agency with Western & Southern Financial Group in Westlake, TX. as Staff Manager to recruit and train future Financial Representatives.

Frank has been serving the professional organization National Association of Insurance and Financial Advisers (NAIFA) as President and National Committee for the local chapter of NAIFA-FT. Worth it since 1991. He served as Trustee at the State level at NAIFA-Texas. He also served as President for Reveille Toastmasters and serves Treasurer for North East Tarrant Toastmasters and was Area Director for District 25. He is currently the 1st Vice President of Colleyville Lions Club since 2017. The Lions Club raises funds for local and global charities to help meet the needs of the underserved.

Frank is involved with the local Chamber of Commerce organizations and is a Diplomat and leader with the North East Tarrant Chamber of Commerce. His passion is being a servant leader, helping people, and building communities. He feels there's a huge void in our schools when it comes to financial literacy and is assisting middle schools in Tarrant County with the help of Junior Achievements to fill this void.

In his free time, Frank likes to indulge in one of his favorite hobbies of hiking, running, biking, fishing, hunting, or anything outdoors. He also enjoys expanding his horizons by picking up a good book to read. Prior to moving to Colleyville, TX, he lived in Progreso, TX. a farming community. Frank has been a business owner. He is married to his wife, Belinda for 39 years and has a daughter and son. They are proud grandparents to Christian and Kowen. They are longtime members of St Michaels Church in Bedford.



## Bruce Murray Tall Texan Award Past Honorees

**2003** Don Ladewig

**2004** Jack M. Morris, LUTCF

**2005** John M. Ruckel, LUTCF

**2006** Alan Carl, RHU, REBC, LUTCF

**2007** H. Dan Smith

**2008** Martha Hall, RHU

**2009** Doug Aycock, CLU, ChFC

**2010** Suzanna Powell, LUTCF

**2011** Randy T. Robertson, LUTCF

**2012** R. Keith White

**2013** Stephen Ehlers, LUTCF

**2014** Stephen L. Harris, CLU, ChFC

**2015** Edward F. Tate, Jr., CLU, ChFC, LUTCF

**2016** Charles Matejowsky, CIC, LUTCF

**2017** Jack Knight, LUTCF

**2018** Tallie O. Young, RFC, LUTCF, CLTC

**2019** *No award given*

**2020** *No award given*

**2021** *No award given*



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# LIFETIME ACHIEVEMENT AWARD

The Lifetime Achievement Award recipients are selected by the NAIFA-Texas Awards Committee after thorough consideration. Recipients of the award have a minimum of twenty (20) years of continuous membership in NAIFA-Texas, demonstrate significant contributions to NAIFA-Texas, including local and/or state leadership involvement, participate in PAC, and contribute to the insurance and financial services industry.

The NAIFA-Texas Board of Directors is proud to announce this year's recipient, Joey Ussery CLU, ChFC, LUTCF with John Hancock.



## **Joey Ussery, CLU, ChFC, LUTCF** John Hancock | Vice President

Joey is the Vice President for John Hancock for Texas and Louisiana. He is responsible for all life brokerage in this territory. He has been with Manulife, now John Hancock, for over 30 years.

He began his career in 1985 with Arthur S. Hicks, Inc. in San Antonio, and moved to Manulife in 1992. In 1993 he was the recipient of GAMA's Rookie of the Year Award. He assumed responsibility for the Houston office of Manulife in 1997.

His service to the Association began on the board of the San Antonio Association, following serving on the board of the NAIFA Houston Association. He served as President of NAIFA-Texas from 2013 to 2014. He currently serves on the NAIFA National Government Relations Committee as well as the NAIFA IFAPAC Committee.

Joey and his wife Darla live outside of Sealy, Texas, and are the proud parents of five boys.



## NAIFA-Texas Lifetime Achievement Award Past Honorees

**2003** The late Charlie Flowers  
The late Oscar Newton  
Tyson Payne  
The late E. Kenneth Tooley

**2004** The late C. Dean Davis, JD

**2005** The late Robert A. Ehlers

**2006** The late O. C. Jackson, CLU

**2007** The late John N. Neighbors, CLU, LUTCF

**2008** John M. Ruckel, LUTCF

**2009** The late Rosalie L. Kuntz, LUTCF  
The late H. Dan Smith, CLU, LUTCF

**2010** The late Jim H. Benjamin, CLU

**2011** Thomas D. Currey, CLU, ChFC, LUTCF

**2012** Dee K. Carter, CLU, ChFC, CSA

**2013** *No award given*

**2014** The late Glen Baecker, CLU  
R. Keith White

**2015** Ron Mullen, CLU, ChFC

**2016** Alan Carl, RHU, REBC, LUTCF

**2017** *No award given*

**2018** Mark Warren, LUTCF

**2019** Stephen Ehlers, LUTCF

**2020** Charles Matejowsky, CIC, LUTCF

**2021** *No award given*

**2022** Russell Donohue, CLU, ChFC  
Douglas Massey, CLU, ChFC, FSS

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