



HIGHLIGHTS

The Newsletter of the LOMA Society of

Waterloo
Spring 2006



A message from
Mary Allan, FLMI, ACS
President, LOMA Society of Waterloo

Well...it's my turn to make some president-like comments, and there are so many different areas to touch upon. I've learned so much since joining as a board member back in 2003. So I think I will start at the beginning...

When I joined the LOMA Society of Waterloo (then known as FLMI), I had been a member for about 15 years enjoying the benefits offered by the Society. Having been in the insurance industry for the last 35 years, I've met a lot of people and it's great to run into these people at the LOMA meetings and catch up. These meetings and the keynote speakers have been interesting, and at times, helpful in my job. I appreciate both the financial speakers and the motivational speakers. It's a great way to meet members from other companies. What motivated me to become a member of the board was the thought it was time I gave back something to the Society.

As a board member I took on the role of creating the newsletter – something which was relatively easy in my current role at Manulife. I also had John Clayton there to provide support and guidance and an edit here and there (something he continues to do and which is much appreciated.)

In 2004, I moved into the role of Secretary – following in the shoes of Maureen Trask who was there for me every step of the way (no pun intended). Along with continuing to produce the newsletter, I also stepped into the vacant shoes of the Instructor for LOMA 290. The Board and I felt that even though the enrollment was small, everyone deserved a helping hand if only to follow a timetable.

In 2005, I moved into the role of Treasurer and again there was help from everyone on the Board. I also gave up the role of Instructor as we found an enthusiastic volunteer interested in taking on that role.

Both classes were in full swing this spring. We have our veteran instructor, Sue Langdon instructing LOMA 280, and Renee Robertson who has taken on the role of Instructor for LOMA 290. Both ladies are under the guidance of our LOMA Education Representative, Jodi Hall.

Still in 2005, I found myself doing two roles, Treasurer and interim Vice President. I must thank Francine Koehler from Sun Life who stepped into the roles of job shadowing first as Treasurer and then Vice President.

Now it is 2006, here I am – the President – and I count myself on being so lucky to have several seasoned board members and enthusiastic new members who have stepped up to the plate. People like Bev Davies and John Clayton who have both been the President at one time and whose guidance and experience will be greatly appreciated. We have

several returning board members and our two newest members, Rose Kubesheskie and Ellen Lovell have stepped into the respective roles of Secretary and Treasurer. While we have a full slate, we need volunteers to job shadow the roles of the Treasurer. We are very fortunate to have an independent member, Nancy Fisher, who is job shadowing the role of Vice President and Janice Beam, who is currently job shadowing the role of Secretary. As an added incentive, any independent board member does not have to pay their membership fee. This same rule would apply to our retirees.

The time commitment needed for Secretary and Treasurer is 2 years – one year in the role of job shadower and one year in the actual role. Time commitment from the Vice President is three years – one as the Vice President, the next as the President and the last as the Past President.

If you are considering it and are not quite sure, I'm sure if you contacted the people in these current roles, they will tell you there are many helping hands and it wouldn't be a huge chunk of your time. Come on board as a board member at large and see if this is something you'd like to do. The Board meets about 6 times a year for two hours. As a board member at large you can do as much or as little as you have the time and desire to commit to.

At our last Board meeting, one of the topics discussed was the LOMA Annual Conference and Conferment. I had attended several meetings and during the course of

time, find myself on a couple of LOMA Committees working with people from across North America on some interesting projects aimed at revamping our Societies. Last year, I was very honoured to be the Manulife representative to accept two education awards on behalf of my Company. I also accepted 4 Outstanding Awards our Society received. These awards are given to Societies who excel in certain areas. As a board member attending the Annual Conference, I am obligated to attend several meetings geared towards LOMA societies, during which I can cast a vote on new guidelines or regulations to be implemented. Each Society is allowed one vote and that vote is placed by the Society's Board representative who is usually the President and/or the Vice President of the Society. With that in mind, the LOMA Society of Waterloo has decided to send a rep out every year and that rep would be the current President. In the event the President is unable to attend, then it would be the Vice President, Treasurer or Secretary who would go in the place of the President.

The Conference is a busy three-day meeting but what a wonderful opportunity to network and meet with people from around the world. If you are interested in what happens, click on this link to view the plans in progress for the 2006 Annual Conference. – <http://www.loma.org/annualconference.asp>

The LOMA Society of Waterloo has the record of having the most members and is the

second oldest society – only behind the LOMA Society of Greater New York which has been around for the last 90 years. In the fall of 1961, a group from Mutual Life (now Sun Life) had the first meeting of the FLMI Society of Waterloo. These pioneers of our Society were Don Post, President, Ed Stevens, Secretary-treasurer, Jack Clarke and Don Goodwin, Program Committee. Their first speaker was in November of 1961, Dunc Winhold, FSA, Assistant Actuary and his topic was "Universal Group Annuities". We've come a long way since then!

This year we celebrate our 45th Anniversary with only 5 more years to go before we reach our 50th Golden Anniversary. The LOMA Society of Waterloo needs the support of the members not only to attend the meetings, but to step up to the plate and take on some of the roles. Just imagine how wonderful it will be to have a 50th anniversary celebration in 2011 – planning for that year starts now. Join the board and become part of the committee in charge of the 50th anniversary program – become a part of the history of this remarkable Society.

LOMA Society of Waterloo

Board of Directors

President	Mary Allan, FLMI, ACS Manulife Financial	Tel: (519) 747-7000 ext. 44557; Fax: (519) 747-6336 Email: mary_allan@manulife.com
Vice President	Francine Koehler, FLMI, ACS Sun Life Financial	Tel: (519) 888-2964, Fax: (519) 888-3457 Email: francine.koehler@sunlife.com
Treasurer	Ellen Lovell, FLMI, ASC Manulife Financial	Tel: (519) 593-4438 Fax: (519) 747-6017 Email: Ellen_Lovell@manulife.com
Secretary	Rose Kubesheskie, FLMI, ACS Manulife Financial	Tel: (519) 747-7000 ext. 32532 Email: rose_kubesheskie@manulife.com
Past President	Bev Davies, FLMI, ACS FaithLife Financial	Tel: (519) 886-4610; Fax: (519) 886-0350 Email: bdavies@faithlifefinancial.ca
Board Member	Janice Beam, FLMI, ACS Manulife Financial	Tel: (519) 747-7000 ext. 36890 Email: Janice_Beam@manulife.com
Board Member	Sylvia Clouthier, BA, FLMI, ACS, ICA Equitable Life	Tel: (519) 886-521- ext. 8113 Fax: (519) 883-7406 Email: sclouthier@equitable.ca
Board Member	Nancy Fisher Independent	Nancy Fisher@sympatico.ca
Board Member	Kathryn Flood, FLMI, ACS Sun life Financial	Tel: 519-888-3900 ext 6471 Email: Kathryn.flood@sunlife.com
Board Member	Dean Langlois, FLMI, ACS, AIAA, ARA Independent	Email: dean.langlois033@sympatico.ca

Non-Board Position

Education Co-Coordinator

Jodi Hall, FLMI, ACS Tel: (519) 744-4176
Corrigan Succession Management Email: jhall@corrigan succession.com

Webmaster

Fran Miller, FLMI
Email: fcm@golden.net

Newsletter Editor

John Clayton, FLMI Tel: (519) 888-3900 ext. 6320; Fax: (519) 888-3143
Sun Life Financial Email: john.clayton@sunlife.com

Be a Volunteer

If you would like to volunteer or require more information, please contact a Board Member

The LOMA Society of Waterloo needs you, so please step forward and take one of the roles and help bring it one year closer to it's 50th Anniversary.

We've been around since 1971 and plan to be around for another 50 or more years.

Volunteering, a great way to contribute to your Society!

Changes to the LOMA Society of Waterloo Board of Directors

New Volunteer...

We are very pleased to announce an understudy for the Vice-President role. **Nancy Fisher** is an independent (someone who is not connected with one of our four member companies). Thanks for volunteering Nancy!!!

New Structure...

Secretary and Treasurer Roles

We have changed our operations slightly so that for the roles of Secretary and Treasurer we will ask for a two year commitment - one as the understudy and one as the incumbent in that role.

Vice – President Role

For the senior roles, we will ask for a three year commitment, first year as the Vice-President, second year as President and finally the third year as the Past President. This commitment will ensure continuity of knowledge and experience.

Member Companies

Sun Life Financial

227 King Street South, Waterloo, Ontario N2J 4C5

Equitable Life

1 Westmount Road North, Waterloo, Ontario N2J 4C7

FaithLife Financial*

470 Weber Street North, Waterloo, Ontario N2J 4G4

*Formerly known as Lutheran Life, to reflect our growing Christian membership, the organization officially adopted the trade name, FaithLife Financial, in March 2005. Website is now www.faithlifefinancial.ca.

Manulife Financial

500 King Street North, Waterloo, Ontario N2J 4C6



Wednesday November 16, 2005 Dinner Guest Speaker Dr Victor Rausch

The LOMA Society of Waterloo was excited to have Dr Victor Rausch as the keynote speaker at its annual dinner meeting. His topic was on the power of self-hypnosis.

A sketch of Dr Rausch's speech, as told by Dr Rausch, follows:

SELF-HYPNOSIS

THE KEY TO GAINING CONTROL
AND CHANGING YOUR LIFE

DISCOVERIES OF ANY GREAT
MOMENT IN MATHEMATICS AND
OTHER DISCIPLINES, ONCE THEY
ARE DISCOVERED, ARE SEEN TO BE
EXTREMELY SIMPLE AND OBVIOUS,
AND MAKE EVERYONE, INCLUDING
THEIR DISCOVERER, APPEAR FOOL-
ISH FOR NOT HAVING DISCOVERED
THEM BEFORE.

G. Spencer Brown – Laws of form

SELF – HYPNOSIS is an absolutely
incredible, powerful, simple modali-
ty, which can be effectively used in
every aspect of life.

Let me categorically state,

- That every one of us has the ability and potential to affect and

control every function in our bodies predictably. I am referring to physiological functions like pulse rate, blood pressure, relaxation response, right down to the automatic biochemical actions in our bodies.

- That we have the potential and ability to directly affect our physical and mental health predictably.
- That we can bring into balance our physical, mental and creative components and function on a level we never before thought possible, and in the process affect everyone around us. This entire process is simple and obvious, once we have discovered it within us.

The key to accessing and directing this potential is SELF-HYPNOSIS, a natural ability that all of us possess. It is simple, predictable and effective.

I have been directly involved with clinical hypnosis and self-hypnosis for over 40 years. I speak with great passion and conviction regarding its benefits not just from treatment results with patients, but from very personal experience.

The only way to test the effective-ness and validity of self-hypnosis is not through book-learning, but through the subjective experience of deep trance hypnosis.

Elaine Carpenter and I have launched the TRI-CENTRIC HYPNOSIS CENTRE.

One-day interactive workshops in

- Self-hypnosis
- Advanced Self-hypnosis and Energy Medicine
- Aging – Growing Younger
- Natural Childbirth – Bonding with the baby and post-natal recovery will be presented.

If you are interested, our website address is
www.tri-centric-hypnosis.com.

Future workshops and events will be announced on our website.

Check it out! We welcome any questions or comments.

Thank you for allowing us to present to the LOMA Society at their Annual Fall Meeting. We were impressed by the enthusiasm of its members.

About Dr Rausch:

DR. VICTOR RAUSCH is a hypnotherapist and dental surgeon. He graduated from the Faculty of Dentistry, University of Toronto in 1964. For five years he served with the Canadian Armed Forces (Royal Canadian Dental Corps) in the capacities of clinician, clinical instructor and lecturer in hypnosis at the Dental School, Canadian Forces Base Borden.

In his role as Dental Officer, he integrated hypnosis into the clinical aspects of dental treatment. His main interest lay in developing techniques for rapid relief of apprehension, pain control, bleeding control and rapid post-operative healing. Dr. Rausch left the Armed Forces in 1969 and opened a private dental practice in Waterloo, Ontario.

His total involvement with and belief in the potentials of hypnosis, prompted him to put it to the ultimate test. In 1978, he had

major abdominal surgery, using SELF-HYPNOSIS as the sole anesthetic agent. It was a major medical breakthrough and became an international news item. He has been extensively interviewed and written about by the news media from around the world.

Dr. Rausch is a Fellow of the American Society of Clinical Hypnosis and a Diplomat of the American Society of Clinical Hypnosis in Dentistry. He is a past member of the American Society of Clinical Hypnosis, the International Society of Clinical Hypnosis and the International Society for the Study of Subtle Energies and Energy Medicine. He has taught and lectured nationally and internationally. Dr. Rausch has also been on the teaching faculty at Wilfrid Laurier University, Department of Psychology. He is actively involved in research as well as teaching.

Seeking Potential Authors

We are looking for volunteers to write industry related articles for our newsletter. If you would like to submit an article for our next newsletter, we'd welcome your contributions!

On hand to present diplomas our newly graduated FLMI's:

**Equitable Life Representative
Pam Cromie,
AVP, Individual Administration &
Claims Services**

**Manulife Financial Representative
Judy Cavill, Assistant Vice President,
Canadian Division
HR Learning & Development**

**FaithLife Financial Representative
Dieter Kays,
President & CEO**



Pam Cromie



Dieter Kays



Judy Cavill



Commencement
of the FLMI
Graduating Class
of 2005

Our newly graduated FLMIs are:

Patty Fleming
Birgit Heilig
Renate Hunke
Dean Langlois
Alan MacKay
Jeanette Magurn
Susan Nagtegaal
Janet Paehr
Cory Weatherbee

Congratulations!



Patty Fleming



Renate Hunke



Dean Langlois



Alan MacKay



Jeanette Magurn



Janet Paehr



Birgit Heilig

Look who came to the November Dinner



Barry Shulist, Liz Wesley-Shulist, Bruce Cameron
Manulife Financial



Teresa Kroeger & Pat Johnson, Equitable



Jane Thomas, Dean Langlois, Lori DePlonty,
FaithLife Financial



Isobel Taylor, Mary Catherine Flannery, Janet
Mckenna, Sun Life



Debbie Hollinger & Erica Miko, Sun Life



Brenda Hogg, Judy Zielinski, Rose
Kubesheskie, Manulife Financial



Karen St. Denis & Kelli Kuzyk,
Manulife Financial



Francine Koehler, Sun Life and Dr. Rausch



Marg Allen, Stan Gnus, Janet Paehr,
Equitable Life

Code/Pledge of Professional Ethics.



With LOMA refocusing to embrace more of the Financial Services industry as a whole, LOMA's Education and Training Council felt that it was appropriate to update the Code/Pledge of Professional Ethics. The 2004 Officer's Manual (which can be downloaded from LOMA's Web site at www.loma.org/societyresources.asp incorporates the updated Ethics for use by your Society. Below is an excerpt from pages 5-6 of the Manual:

Regardless of differences in operating procedures, each Society is encouraged to adopt these guidelines as a means of promoting ethical conduct among its membership.

- The Designee shall discharge all duties with honesty, integrity, objectivity, fairness, and professionalism.
- The Designee shall deal with others in a manner in which he or she would want to be dealt with by others.
- The Designee shall place the public interest above his or her own interest.
- The Designee shall continually strive to master all aspects of his or her business and to improve his or her professional knowledge and skills.
- The Designee shall diligently strive to ascertain clients' best interests and seek to ensure that these interests are met.
- The Designee shall respect clients' privacy and the confidentiality of information they provide, within the constraints of the law.
- The Designee shall comply with the spirit and letter of the law in all his or her activities.
- The Designee shall hold his or her professional designation proudly and seek to enhance the reputation of the designation, as well as the financial services industry, in every way.

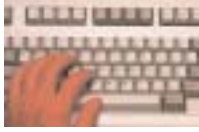
Who's the Winner?

The lucky winner in the survey draw was **Birgit Heilig** from Equitable Life. She received a LOMA key chain. Congratulations Birgitt!



Our donations from the Dinner Meeting were \$143.65 and 26 pounds of food. Way to go!

Thank you for caring and sharing.



Keeping in Touch with your Society

Keeping in Touch: Please contact your company board member to inform us of changes in your contact information if you retire or move.

Current and past members, including retirees, can stay informed about our local chapter: simply visit the LOMA Society of Waterloo site at

<http://fp98.sentex.ca/flmiwat/>

"Thanks" to Fran Miller for maintaining our Chapter website.



Want more information?

For LOMA and FLMI information:
visit the LOMA site at <http://www.loma.org>

LOMA's Society Web <http://www.loma.org/SocietyPage.asp> site is your source for the latest information on the Society name change. A new button has been placed on the front page of LOMA's loma.org site reflecting the name change

LOMA Members Only

More Online Benefits through LOMA Members Only – Get more from your membership -- Register Now!

<https://registeredusers.loma.org/lomacontent/welcome.cfm>

UPCOMING EVENT

**Wednesday, May 17th, 2006
Spring Annual Luncheon Meeting**

**Guest Speaker: Jill Malleck,
Senior Organizational Development Consultant
Golf's Restaurant, Kitchener**

**Reception starts at 11:15 a.m
Speaker starts at 11:45 a.m.*
Lunch served at 12:15 p.m.**

Topic: Epiphany At Work.
Speaking on Coaching and Mentoring,
Jill will also have a book draw for her book "Epiphanies at Work"

Baskets will be on the tables for contributions to the Food Bank

*we had positive feedback on having our guest speaker present before lunch and plan to keep this format.

**Mark your calendar for Wednesday, November 15th, 2006 for our
Fall Annual Dinner Meeting**

**Reception starts at 4:45 p.m.
Dinner served at 5:30 p.m.
Society business at 6:30 p.m.
Speaker TBA at 7:00 p.m.**