



2024 Annual State Conference

A Fantastic Voyage to Great Relationships

February 16-18, 2024

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President's Message



JAMES R. THOMPSON

2024 NAIFA-Texas President

It's finally here; welcome to the 2024 NAIFA-Texas Annual State Conference in Houston! The culmination of 15 months of analysis, discussions and anxiety has brought us to these three days. Our conference committee has diligently selected each session, each speaker, each sponsor to provide you with memorable experiences. We want your participation in this conference to enhance your education, entertainment, and most specifically: **RELATIONSHIPS.**

Any entity, organization or social construct must have viable relationships to survive. All the education, advocacy and differentiation; all the high-powered speakers and fancy banquets; all the eloquence (or lack thereof) of yours truly; none of these can compel you to be involved. If you are not connecting with peers and colleagues in our NAIFA-Texas family, you more easily find excuses not to engage. It is far easier to leave an organization than to leave close friends!

Because of this, each session, speaker, and activity of this conference is designed to promote relation skills, friendly competition, and lots of fun. Yes, we will learn how to be better at our craft; we will test our listening skills, discernment of truth telling, building the strength of team to multiply accomplishment. We'll hear the amazing, real-life story of overcoming devastating wounds, both physical and psychological; we will find inspiration building our belief that success isn't just the accumulation of dollars in the bank, but the magnitude of lives impacted for the better!

An important aspect of our NAIFA-Texas Family is the tradition we enjoy. Tradition is necessary to provide context and continuity to subsequent generations. Those blazing trails before us have provided a path much easier to follow. Unfortunately, the smoother road from which we benefit can lull us into the false assumption that the efforts of our predecessors are no longer relevant. As the memory of the sacrifices made to enable our success diminishes, our appreciation of those traditions does also. Tradition without context becomes ritualistic rote, then dies the death of indifference! Success made easy is not a blessing; it can become the quicksand of complacency. Therefore, embrace challenges. Never shirk responsibility to challenge a challenge. Within the essence of a problem is its inherent solution. It is our privilege to search for the answer. It's how we learn; it's how we grow.

I have boundless thanks for so many who have helped bring this event to fruition. My bulldog committee co-chair, Hollie Gandy Donohue, worked through family tragedy, illness, and obstacles. She embodies the challenger to which I alluded, as has Rebekah Hazlett and Renae Davies on our NAIFA-Texas staff. Thank you, Mark Jones, for being perched on my shoulder reminding me that the only valid expense is an expense that is covered by profit. Rodney Mogen, Chris Hatton, Joey Ussery, Joseph Orr, Joe Neal Kerr, our Non-Dues Revenue committee, the wonderful sponsors, and fabulous speakers – all contribute to the impact this event will have on us. The ultimate reason we do what we do is for others to benefit: This one's for YOU! Thank you for allowing us to serve you. Enjoy, and pass it along!



Conference Agenda

Friday, February 16, 2024

8:30 AM - 1:00 PM

Final 2023-2024 NAIFA-Texas LILI Class | Bailey Baker & Davin Bell
Gemini, Lower Level

The NAIFA Leadership in Life Institute is a six-month program offered exclusively to NAIFA members who are committed to growing intellectually and professionally through deep introspection and discussion. This is the final class for the program participants.

9:00 AM - 1:00 PM

LILI Alumni Summit | Karen Easterling
Apollo, Lower Level

The LILI Alumni Summit is an invite-only session, exclusively for those members who have graduated from the LILI Course in past years. Participants are required to complete an assignment prior to attending the session. **Additional registration is required.**

11:00 AM - 1:30 PM

Registration and Sponsor Connections
Atlantis, Foyer

11:45 AM - 1:00 PM

Spouses Welcome Luncheon
Lower Level

1:30 PM - 2:00 PM

Welcome Aboard! | 2024 NAIFA-Texas President, Jim Thompson
Atlantis, Sections 1-3

2:00 PM - 3:00 PM

Warrior Initiative Presentation | Louise Thaxton
Atlantis, Sections 1-3

This session is sponsored by **Fairway Independent Mortgage Corporation, The Inkman Team.**

3:00 PM - 4:00 PM

Six Tenants of Success | Lieutenant Jason Redman
Atlantis, Sections 1-3

This session is sponsored by **Fairway Independent Mortgage Corporation, The Inkman Team.**

4:00 PM - 4:45 PM

Evening Instructions and Sponsor Introductions | Jim Thompson & Joey Ussery
Atlantis, Sections 1-3

Conference Agenda

Evening Entertainment (Friday, February 16th)

General conference participants are responsible for making their own dinner arrangements on Friday.

5:00 PM - 6:00 PM

Welcome Reception
Atlantis, Section 4

Special thanks to our Welcome Reception Sponsor, **Security Mutual Life**. The reception is open to all conference participants. Those in attendance will be provided light hors d'oeuvres and one drink ticket per person. Cash bar to follow.

6:00 PM - 6:45 PM

2023-2024 Leadership in Life Institute (LILI) Graduation Ceremony
Atlantis, Sections 1-2

The ceremony is open to all conference participants. Please join us to learn more about the NAIFA-Texas LILI program and the journey of each graduate.

6:45 PM - 7:30 PM

NAIFA-Texas Past President's Reception
Endeavor, 2nd Floor

This reception is exclusive to NAIFA-Texas Past Presidents ONLY.

7:30 PM - 9:30 PM

Texas Leaders Round Table (TLRT) Dinner and Speakeasy
Discovery, 2nd Floor

Special thanks to our sponsors, **Midland National Life** and **Spectrum Financial Group**! This dinner is exclusive to current Texas Leaders Round Table members and their guests ONLY. **Additional registration is required.**

9:30 PM - 11:00 PM

TIPS for SIPS for IFAPAC!
Discovery, 2nd Floor

Following dinner, join us for conversations surrounding advocacy. This session is available to IFAPAC contributors and their guests. ALL NAIFA-Texas members are eligible to participate in this session pending their first contribution! Learn more at tx.naifa.org/ifapac

11:00 PM - 12:00 AM

Young Advisor Team (YAT) and First Timer's Event
Location TBD

This event is exclusive to members 40 years of age or younger, NEW NAIFA members, and first time conference attendees.



Congratulations, Mike, on being recognized as the 2023 NAIFA–Texas Local Leader of the Year!



Michael E. Evans, CLU, ChFC, LUTCF

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To learn more about the NAIFA-Texas Board of Directors,
please visit: tx.naifa.org/board or Scan the QR code!



Conference Agenda

Saturday, February 17, 2024

8:00 AM - 8:30 AM

Breakfast and Sponsor Connections
Atlantis, Sections 1-3

Special thanks to our sponsor, **Advisors Academy & Sound Income Group**. Each person in attendance will be provided a complimentary breakfast.

8:30 AM - 9:00 AM

Morning Welcome and Recap | Joey Ussery, CLU, ChFC, LUTCF
Atlantis, Sections 1-3

9:00 AM - 9:45 AM

Liar, Liar Pants on Fire | Traci Brown
Atlantis, Sections 1-3

This session is sponsored by **Kansas City Life**. Learn to read Liars 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, your boss, your team, and prospects.

9:45 AM - 10:30 AM

Panel Discussion: "How to use Home Equity (the greatest buffer asset) to Secure Your Retirement" | Fairway Independent Mortgage Corporation
Atlantis, Sections 1-3

This session is sponsored by **Fairway Independent Mortgage Corporation** and moderated by Michael Inkman. The panelists include NAIFA-Texas Members Jim Thompson, Hollie Gandy, and Mike Evans.

10:30 AM - 11:00 AM

Refreshment Break and Sponsor Connections
Atlantis, Section 4

This break is sponsored by **Illinois Mutual**

11:00 AM - 12:20 PM

Truth or Dare Competition: "What's the Catch?" | Abacus Life
Atlantis, Sections 1-3

Special thanks to our sponsor, **Abacus Life Settlements**. NAIFA-Texas Members will compete with their peers putting their sleuth skills to the test for prizes.

12:30 PM - 1:30 PM

Life Happens Luncheon
Atlantis, Sections 1-3

Special thanks to our sponsor, **The DI Center**. Each person in attendance will be provided a complimentary lunch.

Conference Agenda

Saturday, February 17, 2024 (continued)

1:45 PM - 2:45 PM

Liar, Liar Deep Dive | Traci Brown
Atlantis, Sections 1-3

In this deep dive session, the lie detection skills you learned in Traci's keynote will be put to the test. You'll have the chance to work on solving high profile cases just like our country's top law enforcement does.

2:45 PM - 3:15 PM

Refreshment Break and Sponsor Connections
Atlantis, Section 4

This break is sponsored by **Texas Republic Life**

3:15 PM - 4:15 PM

Making a Difference | Steve Gilliland
Atlantis, Sections 1-3

This session is sponsored by **Athene**

4:15 PM - 5:00 PM

Closing Remarks and Sponsor Giveaways | 2024 NAIFA-Texas President, Jim Thompson
Atlantis, Sections 1-3

Evening Entertainment (Saturday, February 17th)

All conference participants are welcome to attend Saturday evening's entertainment. Each person in attendance will be provided dinner and one complimentary drink ticket. There will be a cash bar to follow.

Complimentary shuttles to NASA's Space Center Houston are available from 5:45 PM - 6:15 PM. Please meet in the hotel lobby to use this service. Return shuttles to the hotel will be provided following the event.

6:30 PM - 9:30 PM

NASA Dinner Reception and Leadership Awards Banquet

Special thanks to our Leadership Awards Banquet Sponsor, **National Farm Life**. Join us as we recognize top leaders in NAIFA-Texas for their achievements in the insurance and financial industries.





TOM COTHRON, LUTCF, FSCP

2024 NAIFA National President

Tom Cothron, LUTCF, FSCP, entered the business in 1979 and joined NAIFA in 1981. In 1986, he was appointed as an Agency Manager for Southern Farm Bureau and manages a multi-line agency in Ocala, FL. He has been named Agency Manager of the Year several times and has also been chosen to receive Florida Farm Bureau's Team Player Award on multiple occasions.

Cothron served as a NAIFA local chapter President in Ocala, FL in 1995 and 2002, as NAIFA-Florida president in 2008-2009, and served on NAIFA's national board of Trustees from 2011-2015. In 2007 he was asked to serve on the "NAIFA In The 21st Century" (NAIFA 21) strategic planning task force and after rotating off the national board in 2015 was asked to serve as a member of the "NAIFA 2020" strategic planning group. He has served as a LUTCF moderator and is a graduate of NAIFA's Leadership In Life Institute.

Cothron serves as a NAIFA Key Contact for several state and federal lawmakers from Florida and his favorite activities include travel with his wife of 30 years, Susie, and any time spent with their 4 children and 6 grandchildren.



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Conference Agenda

Sunday, February 18, 2024

8:00 AM - 9:30 AM

NAIFA-Texas Board of Directors Meeting

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

8:30 AM - 9:30 AM

Breakfast

Atlantis, Sections 1-3

Each person in attendance will be provided a complimentary breakfast.

9:30 AM - 9:45 AM

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

Atlantis, Sections 1-3

9:45 AM - 10:15 AM

Installation of the 2024 NAIFA-Texas Board of Directors | NAIFA National President, Tom Cothron

Atlantis, Sections 1-3

10:15 AM - 11:00 AM

NAIFA-Texas Annual Business Meeting

Atlantis, Sections 1-3

This meeting is for NAIFA-Texas Members ONLY. NAIFA-Texas Members are highly encouraged to attend and participate in this session.

11:15 AM - 12:00 PM

Closing Remarks

Atlantis, Sections 1-3



Anchors Away!

Friday, February 16, 2024 | 2:00 PM - 3:00 PM



AMERICAN WARRIOR INITIATIVE

Louise Thaxton

National Speaker, Author, Veterans Advocate,
Mortgage Professional

This session is sponsored by Fairway Independent Mortgage Corporation, The Michael Inkman Team.

Louise Thaxton (NMLS 69996) has been in the mortgage business for 25 years, almost 23 of those years with Fairway Independent Mortgage Corporation (NMLS 2289), as a producing regional manager, with offices across Louisiana, Texas, Arkansas and Colorado. Louise was named as one of the Top Women Originators in America for 2018 by Scotsman Guide, was included in the top 100 Minority Mortgage Bankers of America (NAMMBA) for 2018, and named by National Mortgage Professional Magazine as one of the "Best Military Lenders and Originators 2018".

She is the National Director of the Military Mortgage Specialist, a designation exclusive to loan professionals of Fairway Mortgage, which trains and equips loan professionals on working with military clients.

Louise is a national advocate for America's veterans and is the Director and co-founder of the American Warrior Initiative, the non-profit of Fairway, leading the way for hundreds of initiatives for veterans in need across the country, inspiring millions of dollars in donations to fund those initiatives.



Notes

[illegible]

Let's Dive In!

Friday, February 16, 2024 | 3:00 PM - 4:00 PM



SIX TENANTS OF SUCCESS

Lieutenant Jason Redman

U.S. Navy SEAL, Motivational Speaker

This session is sponsored by Fairway Independent Mortgage Corporation, The Michael Inkman Team.

Jason Redman is a retired U.S. Navy Lieutenant who spent 11 years as an enlisted Navy SEAL and almost 10 years as a SEAL officer. He was awarded the Bronze Star with Valor, the Purple Heart, the Defense Meritorious Service Medal, the Navy Commendation Medal, the Joint Service Achievement Medal, five Navy Achievement Medals, two Combat Action Ribbons, and the U.S. Army Ranger Tab. After being severely wounded in Iraq in 2007, Redman returned to active duty before retiring in 2013.

In 2013, he launched a speaking and consulting company that focuses on inspirational presentations on leadership, teamwork, and the "Overcome Mindset," helping individuals, companies, and teams to "Get off the X™" from what he refers to as "life ambushes." In addition, Redman provides workshops, online programs, executive coaching, and business consulting to businesses around the world and group coaching through his Get off the X™ training and Overcome Army™ coaching programs.

Redman is the author of the New York Times bestselling memoir "The Trident: The Forging and Reforging of a Navy SEAL Leader" and Amazon bestsellers "Overcome: Crush Adversity With the Leadership Techniques of America's Toughest Warriors" (2019) and the Pointman Planner guided, motivational productivity journal (2021). He lives with his family in Virginia.



Notes

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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 NAIFA-Texas Quality Award Recipients, please visit: tx.naifa.org/history or Scan the QR code!

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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 member, visit:
tx.naifa.org/texas-leaders-round-table



2024 Texas Leaders Round Table (TLRT) Members

Lel Arandela, LUTCF, ChFC, CLU, CASL

Roland Barrera

Jim Coyle, CLU, RHU, REBC

Howard Crissey, CLU, ChFC

Rick Demko, CLU, ChFC, RICP, LUTCF, LACP

Karen Easterling

Mike Evans, CLU, ChFC, LUTCF

Hollie Gandy Donohue, CSA, CSLTC

Greg Goeders, CFP, CLU

David Goldfarb

Andra Grava, CLU, RHU

Mark Jones

Joe Neal Kerr

Charlie Matejowsky, LUTCF, CIC

Tracy Miller, CFP, CLU, ChFC, AEP, AIF, CPFA

Rodney Mogen, LACP, CRPC, AAMS, DBA, DFP

Mark Olson, CFP, MSFS, CLU, ChFC

Joseph Orr, LUTCF

Lesley Pinckard, CLU, LUTCF, FSS, CLTC

Cynthia Price, RICP

Randy T. Robertson, LUTCF

John Ruckel, LUTCF

Ruth Shannon

Jason Talley, LUTCF

James Thompson

Derek True, DIA, DHP

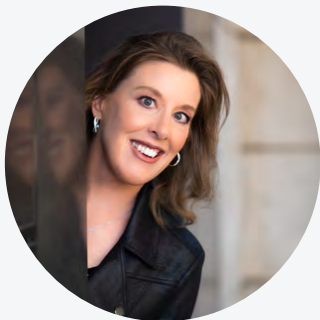
David W. Webb, CSA, LUTCF

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

This list shows TLRT members as of February 1, 2024

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

Ahoy There!



Traci Brown **Body Language Expert**

TIME Magazine has named Traci 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 #3 body language expert in the world and will be featured in the '24 Nivea Lotion ad campaign.

Saturday, February 17, 2024 | 9:00 AM - 9:45 AM

SESSION 1: LIAR, LIAR PANTS ON FIRE

Learn to read Liars 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, your boss, your team, and prospects. Protect your company's hard-earned profits and catch would-be fraudsters before they can take away everything.

You can quit second-guessing your instincts and immediately tell fact from fiction when Traci teaches the nine telltale signs someone is lying, how to quickly uncover the truth, and how to keep nefarious people from making you a victim.

Saturday, February 17, 2024 | 1:45 PM - 2:45 PM

SESSION 2: LIAR, LIAR DEEP DIVE

In this deep dive session, the lie detection skills you learned in Traci's keynote will be put to the test. You'll have the chance to work on solving high profile cases just like our country's top law enforcement does. And we'll deepen your interrogation skills (the fun way). You've got to come to see who we'll interrogate and how. Don't miss this impactful and entertaining session. You'll leave seeing people with new eyes and listening with new ears so you're never deceived again.



Notes

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Rob Sporrer, age 56
Paragliding Instructor

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ABOUT THE LILI CURRICULUM

The NAIFA Leadership in Life Institute is a six-month 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.

To learn more, please visit: tdc.naifa.org/lili

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UPCOMING EVENTS

Around the State

**Stay connected with NAIFA members
across the state of Texas by attending
in-person and virtual events in 2024.**



tx.naifa.org/state-event-calendar

Here for you today and tomorrow

As the world navigates the current pandemic, you may have questions coming to mind as you see the impact in your community, your livelihood, or your client's lives.

Will Midland National be able to fulfill its commitment to my clients?

Will my client's policies perform how I illustrated them?

How do I keep my business running when I can't meet face-to-face with clients?

Those are good questions that I hope to answer to provide additional clarity during this time. Even though the future may feel unclear, you can rest assured in your decision to work with Midland National.

Midland National Life, North Texas

Greg Goeders, Regional Vice President
(469) 858-1938

ggoeders@sfgmembers.com

Midland National Life, South Texas

Ricardo 'Rick' Gomez, Regional Vice President
(210) 471-8224

rgomez@sfgmembers.com

Midland National Annuities, Texas

TJ Meredith, Regional Vice President
(833) 586-0946 Opt. 2

tmeredith@sfgmembers.com

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
or Scan the QR code to learn more!

Continuing Our Voyage

Saturday, February 17, 2024 | 3:15 PM - 4:15 PM



MAKING A DIFFERENCE

Steve Gilliland, CSP, CPAE

National Speaker, Author, Businessman

Focusing on the conscious choices we make every day that impact the lives of others, **Making a Difference™** is an eye-opening and heartfelt keynote detailing how to positively influence people in every imaginable way, regardless of position or status. Each of us has the potential to transform the culture of an organization through our actions and attitude.

Takeaway Message – While we don't always know what challenges face the people we meet every day, we do have the power to bring them hope. That hope can multiply a thousand times over and spread throughout the world exponentially. **Making a Difference™** is about conscious choices that do, and will, impact the lives of people we encounter. One person can change the world. It starts with you!

Steve Gilliland is one of the most in-demand and top-rated speakers in the world. Recognized as a master storyteller and brilliant comedian, he can be heard daily on SiriusXM Radio's Laugh USA and Jeff & Larry's Comedy Roundup. With an appeal that transcends barriers of age, culture, and occupation—plus an interactive and entertaining style—Steve shows audiences how to open doors to success in their careers, their relationships and their lives.

Steve built a multimillion-dollar company from the ground up on the same philosophy he expounds to his audiences. If you continually learn more about your company, your industry, your customer, and yourself, you will always be a leader. You will be purpose-driven rather than process-driven, and you will make a difference. His motto is straightforward: "If you take care of people, the business will follow."

Whether Steve is speaking at an event, writing about current issues that impact others or leading his own employees, he is not just a person who challenges people to change, he motivates them to do so. Steve's personal vision is to wake up every morning and, through humor and inspiration, help others to discover and develop their potential and live life to fullness. Everyone who hears his message leaves with a renewed sense of enthusiasm for who they are and for what really matters.



Notes

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Local Leader of the Year Award

The NAIFA-Texas Local Leader of the Year Award recognizes an advisor's commitment to NAIFA by their service and leadership at the Local Chapter and/or Affiliate level and their positive impact on the insurance and financial services industry.

The NAIFA-Texas Board of Directors is proud to announce the 2023 recipient of the Local Leader of the Year Award, Mike Evans, CLU, ChFC, LUTCF of Coppell, Texas.



Mike E. Evans, CLU, ChFC, LUTCF
The DI Center | Brokerage Manager

Mike brings over 40 years of experience in the life and health industry to The DI Center as a specialist in Individual Disability Insurance (IDI) and Guaranteed Standard Issue (GSI) DI. A native of Lubbock, Texas and graduate of Texas Tech University, Mike began his focus on income protection in 1987 when he opened Paul Revere Insurance Company's West Texas Brokerage Office. He has been partnering with employee benefits brokers and financial advisors to protect their clients' most important asset, their income, ever since!

As a career-long member of NAIFA (since 1980) and long-time member of the National Association of Benefits and Insurance Professionals (NABIP), Society of Financial Services Professionals (SFSP) and International Disability Insurance Society (IDIS), Mike has taught numerous LUTC and CE classes and has been a speaker at multiple state and local industry association meetings. He has also been a guest instructor at Texas Tech's nationally renowned Personal Financial Planning Department and was recently presented NAIFA Dallas' coveted O.C. Jackson Hall of Fame Award in 2021.

Mike and his wife of 45 years, Karen, live in Coppell, Texas. They are blessed with two grown children and five grandsons.



Young Advisor Team (YAT) Leader of the Year Award

The NAIFA-Texas YAT Leader of the Year Award recognizes an advisor's commitment to NAIFA including service on local, 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 the 2023 recipient of the NAIFA-Texas YAT Leader of the Year Award, Michele L. Guzman, RICP.



This award is not associated with the YAT Leader of the Year Award that is presented at the national level. To learn more please visit, <https://tdc.naifa.org/yat>



Michele L. Guzman, RICP

New York Life Insurance Company | Financial Services Professional

Michele is a South Texas native; born in San Antonio, raised in Houston, and relocated to Corpus Christi in 1999 with her family. She is a mother of two beautiful girls, Kambree and Kenzie. They are her sole motivation to thrive and grow personally and professionally.

She holds a bachelor's degree in business management with a focus in Marketing from Texas A&M University Corpus Christi. In 2015, Michele began her Career with New York Life. Since then, she has achieved many professional accolades. In 2023, she earned the Investment Leader award in South Texas and has been recognized as a Life All Star, Annuity Elite, and Council Agent. She has also earned the Retirement Income Certified Professional Designation through the American College of Financial Services. Michele is a perennial qualifying member of the Million Dollar Round Table, and she has acquired the Series 6, 7, and 63 Licenses.

Currently, she serves as Co-Chair for NAIFA Corpus Christi, and is a Board Member of the NAIFA-Texas Membership Value and Texas Leaders Round Table Committee. Michele is currently serving her second term as the President of the Dawson Elementary PTA, and volunteers at Most Precious Blood Catholic Church, Operation Homefront, and many other organizations. In 2023, Michele was recognized as one of Corpus Christi's 40 Under 40 Honorees by the Young Professionals of the Coastal Bend.

When it comes to her practice, she is passionate about creating personal experiences with her clients, guiding them in all areas of financial planning and helping them create generational wealth. As a role model to her daughters, her priority is to provide them with opportunities to be the best version of themselves, and to foster an environment that encourages and guides them to achieve anything they put their mind to.

NAIFA-Texas 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 Aycok, CLU, ChFC

2010 Suzanna Powell, LUTCF

2011 Randy T. Robertson

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

2022 Frank Correa, LUTCF, FSCP



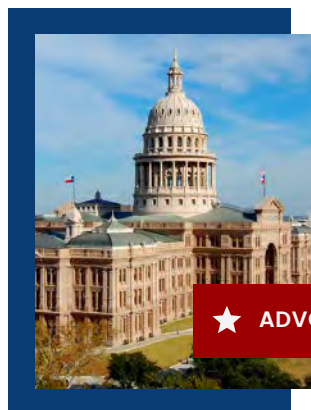
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Bruce Murray Tall Texan Award

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 the 2023 recipient of the Bruce Murray Tall Texan Award, Mark R. Warren, LUTCF.



Mark R. Warren, LUTCF

Mark R. Warren started his insurance career in Dallas Texas in 1978. After many years of Life, health, and Property Casualty work with companies and agencies he located in Plainview Texas with a Property Casualty Independent Agency. In 1993 he bought into the Morgan Eaves Agency in Planview and began his dream of Agency ownership. Mark has been a member of NAIFA since 1978 and a PAC contributor since 1987.

Mark has served his City, County and State as member of many boards and committees and served on the NAIFA Texas board from 1995 to 2006, serving as president of the association in 2005.

Mark has always believed in participation, not only serving, socially exchanging with fellow agents, but most importantly advocacy. Advocacy for the insurance companies, for fellow agents, but most importantly for our customers. He is a recipient of the Lifetime Achievement Award from NAIFA-Texas, past chair of NAIFA-Texas IFAPAC, and is an affiliate member of NAIFA Amarillo. Mark and his wife, Freada live in Plainview Texas and are retired.



NAIFA-Texas Lifetime Achievement Award Past Honorees

2002 Charlie Flowers
Oscar Newton
Tyson Payne
E. Kenneth Tooley

2003 C. Dean Davis, JD

2004 Robert A. Ehlers

2005 O. C. Jackson, CLU

2006 John N. Neighbors, CLU, LUTCF

2007 John M. Ruckel, LUTCF

2008 Rosalie L. Kuntz, LUTCF
H. Dan Smith, CLU, LUTCF

2009 Jim H. Benjamin, CLU

2010 Thomas D. Currey, CLU, ChFC, LUTCF

2012 Dee K. Carter, CLU, ChFC, CSA

2013 Glen Baecker, CLU
R. Keith White

2014 Ron Mullen, CLU, ChFC, CWC

2015 Alan Carl, RHU, REBC, LUTCF

2017 Mark Warren, LUTCF

2018 Stephen Ehlers, LUTCF

2019 Charles Matejowsky, CIC, LUTCF

2021 Russell Donohue, CLU, ChFC
Douglas Massey, CLU, ChFC, FSS

2022 Joey Ussery, CLU, ChFC, LUTCF

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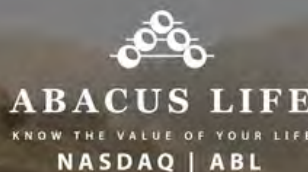


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Executive Director

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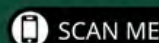


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Lifetime Achievement Award

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 the 2023 Lifetime Achievement Award Recipient, Randy T. Robertson, LUTCF.



Randy T. Robertson, LUTCF

President Randy Insurance | President

2024 is Randy's 47th year of selling life insurance and annuities. Randy Robertson has been a qualifying member of MDRT every year since 1981 with 14 Court of the Tables. In 2014 he sold 1160 life insurance policies and according to Van Mueller, he was the World Champion that year. He has won the National Quality Award every year since 1982. Since 1985, he has been National Farm Life's agent of the year 29 times (19 straight times since 2005). A 2005 LILI graduate, 2011 Tall Texan Award winner, and in 2017 inducted into the NAIFA Dallas Hall of Fame.

Randy joined the Lubbock Area Association of Health Underwriters in December 1979 and became their Public Service Chair in 1982. For 32 years he served on the Lubbock and NAIFA-Texas boards; 1995-1996 President of Lubbock, 2005 President of TLRT and 2009-2010 President of NAIFA-Texas.

He has spoken all over Texas, New Mexico, and Louisiana. His favorite sayings are "There is a 100% chance you will die" and "of all the insurance policies you will buy there is a 100% chance you will use the life insurance".

Randy and (the love of most of his life) his wife Nancy live in McKinney, Texas. He has a son, a daughter, 2 stepsons, 1 stepdaughter, 9 grandkids, and 6 great grandkids.

His theme song is Simple Man:

Find a woman and you'll find love (Nancy)

Don't forget there is someone up above (Jesus)

Be a simple kind of man (no laptops)

Be something that you love and understand (Life insurance agent)



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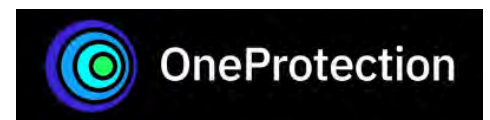
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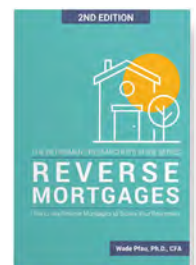
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