



Insurance Advertising Compliance Association  
Practical approaches to advertising topics and issues for  
Insurance Marketing, Legal, and Compliance professionals.

# Register Now ... for the IAdCA 2009 Annual Conference

Register now for IAdCA's 2009 annual Conference at the Sheraton National Hotel. Send in your form today or go online, [www.iadca.org](http://www.iadca.org), to get the early-bird discount! Network with industry peers and hear the latest on topics ranging from building brands to the impact of regulation on advertising.

### Sheraton National Hotel

Ideally situated just minutes from Washington DC, the Sheraton National Hotel provides travelers with easy access to the many attractions in our nation's capital. With stunning panoramic views, contemporary accommodations, and first-class service, our Arlington hotel is the ideal choice for business and government travelers, vacationers, and event guests alike. Boasting unmatched convenience, our Reagan National Airport hotel offers a central setting.

### Hotel Information

900 South Orme Street Phone (703) 521-1900  
Arlington, Virginia 22204 Fax (703) 271-6626

Reservations: 1.888.627.8210  
Group Rate: \$189.00  
On-line Reservations: [www.starwoodmeeting.com/book/IADCA9](http://www.starwoodmeeting.com/book/IADCA9)

Please specify the **Sheraton National Hotel** and that you are attending the **IAdCA Conference** when calling for your reservation. Group rate may be available for a limited number of rooms 3 days prior and 3 days after the conference. The **Sheraton National** will accept reservations into this room block until March 26, 2009.

Attendees may cancel their room reservations without penalty if they cancel by 4 P.M. the day prior to arrival. Check-in time is 3 P.M. Check out time is 12 P.M.

You will receive hotel and additional conference/workshop information after your registration is received.

### General Information

The Insurance Advertising Compliance Association (IAdCA) is an organization for insurance marketing, legal and compliance professionals with a common interest in creative, compliant and compelling insurance communications materials.

Participants in the annual conference include those involved in creative, legal and compliance aspects at insurance companies of all sizes.

**IAdCA's Vision:** To promote advertising and compliance education, and to create a beneficial impact on advertising regulation through active participation by insurance and financial services creative and compliance professionals.

IAdCA's web site, [www.iadca.org](http://www.iadca.org), was launched to further enhance this vision and is available to all. Conference attendees will be provided with member only access to information that helps expand their professional knowledge.

Remember to check our Web site, [www.iadca.org](http://www.iadca.org), for news and updates on the conference. For answers to conference questions, contact Vicki Olson-McQuerry, (515) 248-7559.

# Preliminary Conference Schedule

### Wednesday, April 22

4:00 P.M. – 6:00 P.M. Registration  
6:00 P.M. – 6:30 P.M. New Attendees Meeting  
6:30 P.M. – 8:00 P.M. Welcome Reception

### Thursday, April 23

6:30 A.M. – 7:45 A.M. Registration and Breakfast  
7:45 A.M. – 8:00 A.M. Opening Remarks  
8:00 A.M. – 9:15 A.M. Avoiding Injury While Climbing the Marketing/Compliance Relationship Ladder  
9:15 A.M. – 9:30 A.M. Break  
9:30 A.M. – 10:45 A.M. State DOIs Session  
10:45 A.M. – 11:00 A.M. Break  
11:00 A.M. – 12:00 P.M. Building Brands with Customers, Not Advertising  
12:00 P.M. – 1:15 P.M. Lunch  
1:15 P.M. – 4:30 P.M. Breakout Sessions

### Friday, April 24

7:00 A.M. – 8:30 A.M. Breakfast  
8:30 A.M. – 8:35 A.M. Welcome Back  
8:35 A.M. – 9:30 A.M. Public Policy/Government Affairs– Its Impact on the Insurance Industry  
9:30 A.M. – 9:45 A.M. Break  
9:45 A.M. – 10:45 A.M. Disclosure and Advertising: a Legislative and Regulatory Update  
10:45 A.M. – 11:00 A.M. Break  
11:00 A.M. – 11:45 A.M. Q & A Session  
11:45 A.M. – 12:00 P.M. Closing and Door Prizes

**2009 Annual Conference**  
Sheraton National Hotel  
April 22 – 24, 2009  
Washington, D.C.

See you in  
Washington D.C.

## General Sessions

### Avoiding Injury While Climbing the Marketing/Compliance Relationship Ladder Todd Way, VP of Marketing, AEGON

Marketing 101 tells us there are five steps in developing a lasting relationship with a customer or client: Awareness, Relevance, Trial, Preference, and finally Partnership. These same steps can apply to building a successful relationship between Sales, Marketing, Compliance, and Legal departments inside a financial services organization. Whether you're trying to scale multiple approval levels inside a huge corporation, span geographic distances between review groups, bring divergent departments closer together or decrease the gap between sales and legal priorities, the Relationship Ladder might be the tool you're looking for.

### Departments of Insurance Session

Hear directly from Insurance Department representatives on advertising regulations, current issues and what is expected from companies doing business in their states.

### Building Brands with Customers, Not Advertising Scott Calame – Calame DMC, LLC

Discover a step-by-step, relationship-based approach to building your brand in consumers' minds with direct marketing communications tailored to the level of relationship you have with the customer. It's a framework for building your brand not overnight with advertising, but over time—with customers.

- How to balance concern for response rates with brand image.
- How (and why) to avoid sending "advertising" in the mail.
- How to apply personal relationship-building skills to the process of selling and brand building.
- Why direct marketers are uniquely situated to help build strong brands.

### Public Policy/Government Affairs: Its Impact on the Insurance Industry

George Nichols - Senior Vice President & Executive Management Committee Member , New York Life

Hear directly from the head of New York Life's Office of Government Affairs about how his experience as an insurance commissioner shaped his approach to government affairs and how his team manages/navigates the ever-changing legislative and regulatory landscape. George will provide his insight on the political environment and the myriad issues affecting the Company.

## General Sessions (cont.)

### Disclosure and Advertising: a Legislative and Regulatory Update Kelly Ireland, ACLI

This session addresses developments and emerging issues concerning disclosure, the impact of SEC Rule 151A, and the use of sales and advertising materials, illustrations, and producer credentials. Discover what's new and what's coming, and stay on top of relevant topics.

### General Session Q&A: Learn from your peers and share YOUR experience.

This is an excellent opportunity for group interaction and individual networking. Submit your questions ahead of time via the online or paper registration form.

## Breakout Sessions

### FINRA's Rules for Variable Insurance Product Communications: New Standards and Old Favorites Amy Sochard, Director, Programs & Investigations, FINRA's Advertising Regulation Department

Learn about FINRA's proposed new rules for variable insurance product communications and explore FINRA's approach to equity indexed annuity advertising. We will also cover current topics including seminars, designations and ghostwritten material.

### Building Successful Integrated Marketing Programs J. Hoey, TPG Direct

A strong, customer-oriented message and consistent graphic design is the starting point for successful marketing and helps assure ethical and compliant communication. Targeting, timing, and effective reach are enhanced by attention to brand awareness, consumer response and increased scale. The keys to a successful marketing program are to:

- Identify the optimal audience
- Define relevant value proposition
- Develop contract strategy
- Create the message and engage the customer

### You Pick the Winner!!

Scott Calame – Calame DMC, LLC

Look at head-to-head direct-mail tests and guess which one won. This fast-paced, entertaining primer on direct marketing covers basic strategy, offer development, and creative execution. With real-world examples of best practices (as well as worst practices to avoid), this fun and interactive presentation covers both fundamentals and high-level strategic thinking.

## Breakout Sessions (cont.)

### Marketing Messages: The Compliance Perspective David Kelly, Advertising Compliance, Aflac

It's not fair, of course. Coke says, "It's the real thing!" Burger King says, "Have it your way!" Wal-Mart says, "Save money. Live better." Catchy. Sexy. They can say it ... why can't we? If you're new to the compliance game, join us as we explore the impact of marketing language on advertising.

### Hands-on Review: Regular & Advanced Tom Stallings, Professional Market Practices, Inc.

A practical, "hands-on" recognition of advertising violations. This workshop will look at specific ads for mandatory compliance requirements. This review is designed for all lines of business with practical advice that you can use right away. Two sessions will be offered to accommodate newer and more advanced reviewers.

### Internet Marketing

Kevin McKenna, The Jackson Consulting Group, Ltd. (JCG)

This interactive discussion focuses on the components of internet marketing including: lead generation, branded sales, media utilization, financial implications and expansion opportunities.

### Advertising Compliance: State Advertising Law Overview Karen Lierley JD, Assist. VP Compliance

This presentation provides a survey of the advertising compliance laws for all lines of business in all states and the District of Columbia. Hear an overview by topic of the areas regulated. You'll also receive a lovely parting gift: a chart of each jurisdiction's laws and regulations.

### How to Create the Ideal Relationship Between Marketing and Legal/Compliance Departments Scott Calame – Calame DMC, LLC

Are your Marketing and Legal/Compliance areas at odds? Scott Calame shares his strategies for easing the compliance burden by creating a more ideal relationship through common goals and established procedures.

## Registration Information

Registration before March 22, 2009 - \$475  
Registration on or after March 22, 2009 - \$525

On-line registration now available using PayPal at [www.iadca.org](http://www.iadca.org).  
Mail or fax form and fee to: IAdCA  
P.O. Box 140593  
Irving, TX 75014-0593  
Fax: (813) 288-5773

**Multiple Registrations Discount:** When 2 or more individuals from the same company register, there is a \$50 per person discount. Submit a separate registration form for each attendee and include all names under the "Registering with" section. Registrations must be submitted together to receive the reduced rate. **Note:** IAdCA cannot apply the multiple attendee discount for registrations submitted separately from the same company.

Fax or mail multiple registrations together in order to receive the reduced rate. Conference refunds are only available for cancellations before March 30, 2009.

### Registration Form:

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

Title: \_\_\_\_\_ Company: \_\_\_\_\_

Registering with (must include all registrants' forms for discount):  
\_\_\_\_\_  
\_\_\_\_\_

Line(s) of business: \_\_\_\_\_

Primary job responsibility: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

First Name on Badge: \_\_\_\_\_

Please copy this form for additional registrations.  
 Check here if you require special accommodations  
(to remain confidential)

If paying by credit card:  
 Visa  MasterCard  American Express

Credit Card Number: \_\_\_\_\_

Expiration: \_\_\_\_\_ Cardholder: \_\_\_\_\_

Authorized signature: \_\_\_\_\_ Date: \_\_\_\_\_

If paying the registration fee by check, make check payable to IAdCA and include all registrants' names on the check or check stub. (IAdCA Tax Identification No. 81-0586053)

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