

Register now – and get noticed!

| MEETING REGISTRATION | Early Bird (By January 19) | Regular |
|--|-------------------------------|---------|
| PIMA Agency Member | \$ 990 | \$1,090 |
| Additional Agency Member | \$ 900 | \$1,000 |
| Prospective Agency Member* | \$1,090 | \$1,090 |
| Company & Business Partner | \$1,190 | \$1,290 |
| Additional Company & Business Partner Member | \$1,090 | \$1,190 |
| Prospective Company/Business Partner Member* | \$1,290 | \$1,290 |
| Retiree Member | \$ 300 | \$ 300 |
| Partner/Guest Fee** | \$ 100 | \$ 100 |

* Nonmembers may attend up to two PIMA meetings at the prospective member rate. Prospective member attendees who join within 60 days of the meeting shall have a discount applied to dues upon joining.
**This fee applies to Adult guests only (over age 18) to cover food & beverage costs.

To Register

Register online at www.pima-assn.org. Upon registering for the meeting you will see a link to the hotel reservation page. **Register & reserve housing online by January 19, 2009 for PIMA's special room rate of \$299 (includes daily resort fee).** For questions about hotel reservations or accommodations, call Meaghan Corkrey at Empire Travel Solutions at 1-800-456-6778. (Or, go to www.pima-assn.org/AM09 to download and FAX the Registration Form with payment.)

Early bird discount: Save \$100 when you register by January 19. Final housing deadline is also January 19, 2009.



Travel & Destination Notes

The Arizona Biltmore Resort & Spa
Phoenix, Arizona
www.arizonabiltmore.com

Known as the "Jewel of the Desert," the historic Arizona Biltmore Resort & Spa provides a restful oasis of 39 acres covered with lush gardens, glistening swimming pools, and Frank Lloyd Wright-influenced architecture.

Set in the heart of Phoenix, the Arizona Biltmore has been a favorite of celebrities and United States presidents throughout its colorful history.

This acclaimed property features:

- 739 guest accommodations including one- and two-bedroom villas
- Eight swimming pools (with several daytime cabanas for rental)
- Seven tennis courts
- A full-service resort spa, salon, and fitness center
- Five dining options

The adjacent Arizona Biltmore Country Club boasts two 18-hole PGA golf courses: The Links and The Adobe.

Note: **Resort Attire** is appropriate throughout the meeting. Smart or Business Casual is suggested for Saturday night.

Airport & Transportation

The property is only 7 miles from the Phoenix Sky Harbor International Airport; attendees do not need to rent a car unless doing off-site travel. (There is a daily complimentary self-parking at the hotel.) Taxis (\$33 one way), Super Shuttle service (\$16 one way) or town-car service (avg. \$45) can be arranged. Contact the Resort Services desk at 602.955.6600 ext. 7000 or ExecuCar, the preferred town-car service for the Arizona Biltmore. www.execucar.com or (800) 410.4444, Super Shuttle is 602.244.9000.

PIMA Partners Program

Friday, February 27

Book Club

9:30 a.m.-10:30 a.m.

PIMA Partner Carol Lenz will lead a discussion of the classic novel, *A Tree Grows in Brooklyn* by Betty Smith. This distinctly-American tale of a turn-of-the-century Brooklyn family is both poignant and humorous.



The Arizona Biltmore Resort & Spa

11:00 a.m. - Noon

Salsa making demo

Learn & sample six savory and fruit salsa recipes.

Partners are also welcome at the Opening & Closing Keynote sessions or may register for PIMA's Golf Tournament.

Saturday, February 28

Partners are welcome to enjoy the property's spa, pool, tennis and fitness facilities OR venture to nearby shops or the historic Wrigley Mansion. You may also take the complimentary guest tour of the property and hear about the architecture & some of the famous past guests.

Notes: The Partner Program, for spouses and guests, includes Thursday and Saturday night's social events.

Children are welcome at our evening meal events. The hotel also has a by-reservation **Kids Korral** and can assist with babysitting needs.

See www.arizonabiltmore.com for more information about activity options.

Please share this brochure with your Partner/Guest!

REGISTER TODAY!
2009 PIMA Annual Meeting
Early Bird and
Housing Deadline -
January 19, 2009

230 E. Ohio Street
Suite 400
Chicago, IL 60611
817-569-7462 (PIMA)
FAX: 312-644-8557
www.pima-assn.org

pima

2009 PIMA ANNUAL MEETING

Go for the Gold

Mine the New Economic Terrain

A Senior Leaders Meeting on Business Forecasts and Strategies in a New Market Environment

February 26 –
March 1, 2009

Arizona Biltmore
Resort & Spa
Phoenix, AZ



Register today!

Early Bird deadline – January 19, 2009

At the Professional Insurance Marketing Association...networking means business.

Go for the Gold

Mine the New Economic Terrain

There are many changes & challenges facing our industry today, related to...evolving regulatory and market conditions...emerging & new product opportunities...and, as always, improving marketing results.



I invite you to join us to explore these and other issues at PIMA's 2009 Annual Meeting in Phoenix. We believe that you will find answers to many of your tough questions, both from our program and from each other.

This meeting is the premier annual event for leaders in the insurance direct marketing arena – those of us serving the affinity/sponsored marketplace. Our Conference Chairs have worked diligently to provide superior topics and presenters. As is our tradition, we will include several formal and informal networking opportunities and will elect our new leaders.

I hope that you will make plans to join your peers & colleagues at this important meeting. Register today at www.pima-assn.org.

Paul C. Latchford, Esq.
PIMA President

2009 Annual Meeting Conference Chairs



Jennifer Damme,
Marsh Consumer Connexions



Syma Mendelsohn,
JZA Affinity, Nonprofit Division of RCM&D



Marcia Moore,
Transamerica Affinity Services

Conference Highlights

- Economist Jeff Thredgold & Senior Industry Executives' Insights
- NAIC Report
- Agency CEO Forum
- Direct Marketing Strategies & Trends
- The Retiree & Association Marketplaces

Why Attend?

Severe pressure on the economy, and other changes in the landscape, may accelerate insurance industry reform and change the way we do business. Hear the views of our own member leaders, plus outside experts, on these and other key questions our industry niche faces. This meeting will spark conversation and business solutions.

Join us to...

- Network with the leaders in the affinity direct marketing arena
- Get up to speed on trends, challenges, and issues
- Find resources to enhance your business success

Who You Find at PIMA

Aetna • Acxiom • AON • AIG American General • AMPAC • AMA Insurance Agency • AmWINS/NEBCO • ARAG • CIGNA • Gilsbar • The Hartford • ING • Knowledge Base Marketing • Marsh • New York Life • Pearl • Prudential • Selman • Transamerica • United Healthcare • USI Affinity • and others in the affinity business!



Conference Agenda

Indicates a networking event

Thursday, February 26

Board of Directors Meeting

8:30 a.m.- 11:30 a.m.

Committee Meetings

1:00 p.m.- 4:00 p.m.

New and Prospective Member Reception

5:30 p.m. – 6:00 p.m.

Welcome Reception

6:00 p.m. – 8:00 p.m.

Join us for our sunset opening event co-sponsored by MasterCard. Connect with current business colleagues & meet new ones over a light dinner/heavy hors d'oeuvres.

Friday, February 27

Registration

7:00 a.m. – Noon

Roundtable Discussions & Breakfast

7:00 a.m.- 7:45 a.m.

President's Welcome

7:50 a.m. – 8:00 a.m.

Opening Keynote

8:00 a.m. – 8:55 a.m.

An Insider's Report on the Economy

SPEAKER: Jeff Thredgold, CSP, Economic Futurist/Thredgold Economic Associates

Get an up-to-the-date tour of the economy, financial markets, government – and a sneak preview of what the future may hold. With traditional institutions and business models in flux, and consumer focus on the financial services sector at an all-time high, get an expert view of the economic landscape and how it will impact *your* business. www.thredgold.com



JEFF THREDGOLD

SAM FLEET

BILL VIT

MARILYN CARP

LORI HIGH

JOHN COLEMAN

BILL TYSON

WARREN HUNTER

MIKE WISE

KATHLEEN BELL

DARRELL ROBERTSON

KENNETH JUDKOWITZ

BRIGITTE MADRIAN

Senior Executive Insights

8:55 a.m. – 10:20 a.m.

Learn how our own Agency & Company leaders view today's major business and economic issues, with a sharp focus on the interests of PIMA members. In addition, hear what these leaders have to say about opportunities and challenges as they position their own companies for future success.

Part I – Agency Leaders Panel

MODERATOR: PIMA President-Elect Frank Fimmano, CLU, Aon Consulting

SPEAKERS: Sam Fleet, President & CEO, AmWINS Group Benefits/NEBCO
Bill Vit, President & CEO, Aon Affinity Insurance Services

Part II – Company Leaders Panel

SPEAKERS: Marilyn Carp, President & CEO, AEGON Direct Marketing Services, Inc.

Lori High, President, Prudential's Group Insurance

Networking Break

10:30 a.m. – 11:00 a.m.

Breakout Sessions

11:00 a.m. – 11:45 a.m.

Track I: Agency CEO's (only) Forum

Track II: Affinity Marketing Strategies and Trends Revealed

MODERATOR:

Linda Brignola-Braverman, Senior Vice President, Topak Marketing, Inc.

SPEAKERS:

John Coleman, Director of Insurance Services, Mintel Comperemedia

Bill Tyson, EVP & COO AMPAC Insurance Marketing, Inc.

Warren Hunter, Chairman & CEO, DMW Worldwide

Mike Wise, Vice President IdeaStar, Inc.

PIMA member marketing experts discuss cutting-edge affinity marketing strategies and trends. From social networking to analytics to multi-channel marketing, assess your current strategies--and develop new ones--as our panelists share what's best in class.

Track III: Association Trends

MODERATOR:

Joan O'Sullivan, Managing Director, Marsh Consumer Connexions

SPEAKERS:

Kathleen Bell, CLU, Senior Director, SmithBucklin Corp. & ASAE Fellow

Denise Friday, CLU, Vice President, American Medical Association Insurance Agency, Inc.

Learn how economic, demographic, and technology changes are impacting association membership programs – and how that may impact your programs.

Best of PIMA

11:50 a.m. – 12:15 p.m.

Our PIMA Marketing Methods Competition judges and award recipients, including Best of PIMA recipient USI Affinity, share details on this year's best entries!

Afternoon Networking events

1:00 p.m. – 6:00 p.m.

Sue Ellen Witten Memorial Golf Tournament

3:00 p.m. – 4:00 p.m.

PIMA Cabana (on-site)

Evening networking-on-your-own

Saturday, February 28

Advisory Forums and Breakfast

7:15 a.m. – 8:00 a.m.

Regulatory Update – NAIC

8:05 a.m. – 8:45 a.m.

SPEAKER:

Roger Sevigny, NAIC President-Elect & New Hampshire Insurance Commissioner

This session will delve into the regulatory environment in 2009.

Annual Business Meeting and Elections

8:50 a.m. – 9:05 a.m.

Maximizing Your Affinity Marketing – Best Practices: AARP Case Study

9:05 a.m. – 10:00 a.m.

SPEAKERS:

Darrell Robertson, Vice President, New York Life AARP Operations

Kenneth Judkowitz, Director of Insurance Products, AARP Financial

AARP and New York Life have a 15-year partnership in marketing life insurance to AARP members. With more than 1 million certificate holders, this is the company's most successful endorsed insurance program. What's their secret? Explore how these partners work together and hear how they manage and support this customer-centric line of business.

Networking Break

10:00 a.m. – 10:20 a.m.

Retirement – Insight on Economic Factors

10:20 a.m. – 11:10 a.m.

SPEAKER:

Brigitte Madrian, PhD, Aetna Professor of Public Policy and Corporate Management Harvard Kennedy School of Management

How are economic factors affecting retiree decisions? What does research show us about their financial needs and possible marketing opportunities? Attend this session to learn about the challenges – and opportunities – in this turbulent time.

Closing Keynote

11:10 a.m. – Noon

The Future of Direct Marketing – Turning Gold into Platinum

SPEAKER:

Roger Craver, Founder, Craver, Matthews, Smith & Co.

Roger Craver, an expert in direct marketing for affinity organizations shares his insight and recommendations about new markets and product opportunities. Fast-changing demographics and communications patterns are altering the ways Americans give the \$350 billion they contribute to non-profits – and insurance products are an increasingly important part of the fundraising mix. Find out how this trend affects us and how you can benefit!

Closing Remarks

Noon

Prize drawing & Golf Awards

Networking-on-your-own

Closing Reception

6:00 p.m. – 7:00 p.m.

Closing Dinner

7:00 p.m. – 8:30 p.m.

Passing of the Gavel & Awards Presentation

Afterglow Dessert Reception

8:30 p.m. – 9:30 p.m.

Congratulate award recipients and the new President and enjoy one last chance to connect with colleagues!

Sunday, March 1

Bun-on-the-Run

6:30 a.m. – 10:00 a.m.

Light breakfast to go!



For more than 30 years, the Professional Insurance Marketing Association (PIMA) has been the premier networking, education & resource forum for leaders in the insurance direct marketing industry—serving associations, employers, financial institutions & other groups.



Where Decision-Makers Meet Deal-Makers