

2017 NAIFA-OREGON INDUSTRY AWARDS (for 2016 production)

SELECTION RULES

Agent of the Year * Senior Agent of the Year
Multi-Lines Agent of the Year * Health Agent of the Year

This year's selection rules for Agent of the Year, Senior Agent of the Year, Multi-Lines Agent of the Year and Health Agent of the Year are as follows:

- 1) Each local association is asked to submit one or more nominations for each of the four awards. Additional nominations should be submitted by the local association, members, or company representatives.
- 2) Nominees must be a current member, in good standing and must have paid current dues by the time of the application. **Nominees must give assurance that they will be in attendance at the NAIFA-Oregon Industry Awards Banquet at the state convention on March 29, 2017 at the Salem Convention Center.**
- 3) A person who has won one of the above awards will not be eligible for nomination for that same award for a five-year period.
- 4) Each nomination must be submitted on the official form provided. Supplemental information should be attached to the application. Each application must be submitted to the local awards chairperson or local president for verification of dues payment and association activity. NOTE: Applications may be forwarded directly to Don Nau at the address below.
- 5) Nominations must be postmarked and sent to Don Nau by March 8, 2017.
- 6) The awards are judged for overall achievements, **not just production.** The breakdown in the candidate's scoring is as follows: Volume of qualified business counts **34 percent**; association and industry activity counts **33 percent**; and, citizenship and community activity counts **33 percent**.
- 7) Production qualification will be based on the paid business for the previous calendar year. The committee will request verification as required.
- 8) Eligible products include policies written by an insurance company such as ordinary Life, UL, Term, individual, group annuities, individual and group disability income, pension, various riders and Broker/Dealer CONCESSIONS (including Advisor Fees and all Variable products - Life and Annuities-EXCLUDING trails). **DO NOT include individual or group health unless nominated for the Health Award and then in the appropriate places.**

Return completed applications by fax, email or mail to:

Don Nau
818 S 69th St.
Springfield, OR 97478
Fax 1-541-726-8547/
email- naud1@comcast.net

QUESTIONS? Call Don at 541-747-1458

NAIFA-OREGON

2016 INDUSTRY AWARDS APPLICATION FORM

(2016 PRODUCTION)

Agent of the Year
Multi-Lines Agent of the Year

Senior Agent of the Year
Health Agent of the Year

AWARD CATEGORY TIME REQUIREMENTS

AGENT OF THE YEAR: An agent with less than TEN years by 12/31/16.

SENIOR AGENT OF THE YEAR: An agent who has completed 10 or more calendar years by 12/31/16.

MULTI-LINES AGENT OF THE YEAR: Minimum of 5 years

HEALTH AGENT OF THE YEAR: Minimum of 5 years

NOMINATIONS (completed form and related information) **MUST BE POSTMARKED BY March 8, 2017.**

I nominate _____ as (CIRCLE ONE)
* Agent of the Year * Senior Agent of the Year * Multi-Lines Agent of the Year * Health Agent of the Year

Nominee's address: _____

Nominee's company/or list as independent _____ Year Licensed _____

Nominated by: _____

Nomination verified by: _____ Local Association Award Chair or President (CIRCLE ONE)

Qualifications --- **ACTIVITIES, EXCEPT FOR PRODUCTION ARE LIMITED TO THE LAST 5 YEARS**

- ⇒ Local Association and insurance industry activity: Includes local association participation, board member, officer, work on committees, leadership participation (local or state) or completion of LUTC, CLU, FSS or other designations, and MDRT membership. List any company honors or accomplishments and any industry awards (NQA, NSAA etc.) *ATTACH NARRATIVE. 33 points*
- ⇒ What community, religious, or citizenship activities have YOU participated in over the last 5 years. This will include organizational work, fundraisers, committee work" working on a board, etc. *ATTACH NARRATIVE. 33 points*
- ⇒ Production: New Life Insurance/Annuities, Disability Income, & Broker/Dealer GDC'S (excluding Trails) **34 points.**
Complete details on attached page.
- ⇒ Health Agent of the Year nominations only:
Complete details on attached page.
- ⇒ Multi-Lines Agent of the Year nominations only:
Complete details on attached page.

Return this form with substantiating and any additional information to either:
Don Nau, 818 S. 69th St. Springfield, Or, you may fax completed forms to: 541-726-8547
Or email at naud1@comcast.net

Production Report for _____ (Please insert name)

Production information is considered confidential & will only be viewed by the selection committee.

PRODUCTION WILL COUNT FOR 34% OF AWARD REQUIREMENTS

PRODUCTION RECORD FOR AGENT AND SENIOR AGENT OF YEAR

⇒ **New Life Insurance, Annuities, Disability Income, & Broker/Dealer GDC's** (excluding Trails)

Number of new individual lives written and issued in 2016 _____ First year commission/GDC'S generated _____

Number of new group cases written and issued in 2016 _____ First year commission/GDC'S generated _____
(only on above products listed)

PRODUCTION RECORDS FOR HEALTH AGENT OF YEAR

Number of health insurance cases written and issued in 2016: Group _____ Individual _____

Gross Commission on new health insurance cases 2016: Group _____ Individual _____

Retention rate for 2016 ____ %

PRODUCTION RECORDS FOR MULTI-LINES AGENT OF YEAR

P&C Gross New Premium for 2016 _____ P&C Gross Premium for 2016 _____

Number of New P&C policies written and issued in 2016 _____ P&C Retention rate for 2016 _____ %

Life/Health/DI Policies Written _____ Gross Commissions 2016 \$ _____

Attested to by: _____ Supervisor or G.A.

Contact Information to verify above disclosures:

Manager: _____

Company: _____

Phone: _____

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Or email to naud1@comcast.net*