



RHUSTER

DECEMBER

WERE ONLINE AT WWW.OKTAHU.COM

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2006 Calendar

December 5th, 2006

TAHU Holiday Social
@ Fox and Hound

January 18th, 2007

TAHU General Membership Meeting
HIPPA Overview, Kathy Mitchell
1 hour CE
More details TBA.....

January 29-31, 2007

Day at the Capitol
More details TBA....

March 15th, 2007

TAHU General Membership Meeting
More details TBA.....

May 7th, 2007

State Golf Tournament
@ Perkins, OK more TBA....



Please welcome our newest members at the next general membership meeting!

1. Amy Eastman- BCBS, email: amyeastman@hcsc.net, recruited by Deborah Crall
2. Stephania Grober- BCBS, email: stephaniagrober@hcsc.net, recruited by Kay Ameen
3. Jennifer Miller- The Holmes Organization, email: jmiller@theholmesorg.com, recruited by Dee Sink
4. Mandy Sage- BCBS, email: msage@bcbsok.com, recruited by Melissa Sanden
5. Troy Turner- Advanced Benefit Systems, email: troy@advben.com, recruited by John Lamb
6. Felix Jones- The Holmes Organization, email: fjones@theholmesorg.com, recruited by Dan Hart/Dee Sink

Keep up the great work recruiters!!



TULSA ASSOCIATION OF HEALTH UNDERWRITERS 2006-2007 OFFICERS

PRESIDENT

Susan McGinnis
susan@benex.com
918-369-5900

PAST PRESIDENT

Alicia Tiefenthaler
atiefent@hillrest.com
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PRESIDENT ELECT

Barry Wilson
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VICE PRESIDENT

Andrea Blevins
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918-663-8888

SECRETARY

Sheila Hood
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918-925-3222

TREASURER

Dale Whiteis
dale@whiteisbenefits.com
918-499-5380

Trustees

Bob White
Glen Mulready

Directors

Harry Hanig
Tim Hendricks
Lisa DeRycke
Mike Stephens

If you are interested in serving on the TAHU Board of Directors either chairing or serving on a committee, please contact one of the current Board members.

Presidents Message!



We had a great showing of members and guests at the November General Membership Meeting wherein NAHU President, David Fear, provided a powerful CE program on the future of health care. He challenged all members to become legislatively involved through our chapter in light of the recent Democrats taking majority of the House!

Contact our TAHU Legislative Chair, Bob White @ bwhite@ccok.com to learn how you can do your part through Operation Shout which takes less than 2 minutes. On issues that directly involve employers, you can forward the Operation Shout to your clients. Operation Shout is synonymous with Career Insurance!

The TAHU Annual Christmas Social had a great turnout! It was a lot of fun and we want to thank all who came. We also want to thank everyone who sponsored the Angel Tree. (International Ins. Brokers, Summit Financial, Rich & Cartmill, Benefit Designs, Tim Hendricks and BenEx). We appreciate All who made donations to this Great cause.

Finally, I'd like to wish each of you and your families a safe and very Merry Christmas and a Happy New Year. I look forward to seeing everyone next year at the January General Membership Meeting.

Susan McGinnis, RHU



LEGISLATIVE UPDATE



Giving Back to the Community

According to a recent poll, an impressive 90 percent of small-business owners contribute to their communities. As a small-business owner, you probably receive a number of requests to lend support to worthy causes throughout the year. And if you're a typical business owner, you've given your time and/or money to one or more of these causes.

Most business owners give back to their communities for personal reasons, but businesses reap many other benefits from these contributions -enhancing the businesses reputation, creating a better business climate, and free publicity to name a few.

One way to reap even greater rewards is by implementing a charitable giving strategy. If structured properly, this approach can result in a reduction in income taxes and, potentially, estate taxes. A reduction in your tax liability could also help free up more of your assets to donate to charity.

A Better Strategy

Two popular methods for structuring charitable giving involve setting up a trust.

- **Charitable remainder trust (CRT):** When a CRT is established, the donor names a beneficiary to receive the assets in the trust upon his or her death. The donor may receive income generated by the trust during his or her lifetime, while the trust assets are typically excluded from the donor's estate. Any assets transferred to the trust may be partially tax deductible and are exempt from any current capital gains tax.
- **Charitable lead trust (CLT):** When you set up a CLT, income generated by the trust assets is directed to the charity of your choosing. This can help reduce any current income taxes due on trust income, and the remaining trust assets can be passed to heirs upon your death. As you review these strategies, also consider whether to donate personal or business assets. The appropriate choice will depend on a number of factors, including how your business is structured, your estate conservation strategy, and current level of giving. Bear in mind that not all charitable organizations are able to use all possible gifts. It is prudent to check first. The type of organization you select can also affect the tax benefits you receive. The use of trusts involves a complex web of tax rules and regulations. You should consider the counsel of an experienced estate conservation professional before implementing such strategies. Before you write another check, consider the additional benefits that a structured giving strategy can provide. Call today to learn more.



There is a new tool for you to see your standings in the Triple Crown award from NAHU. The criteria to qualify for Triple Crown are:

1. 2 new members
2. HUPAC 10 x 12 or at least an annual contribution of \$150
3. 3 Operation Shouts

The Triple Crown qualifying period is annually, from January 1st through December 31st. You still have time to qualify for Triple Crown for 2006 and join Lisa DeRycke, Susan McGinnis, Mike Stephens and Bob White. Qualifications are tallied annually; however, qualifiers are announced quarterly. Susan was our first local Triple Crown, recognized first quarter 2006. Lisa, Mike and Bob were recognized second quarter 2006 and there were no Tulsa members recognized for third quarter 2006.

You can now check your status on any of the above criteria. If you are interested in knowing how close you are to Triple Crown qualification, just go to the NAHU website at www.nahu.org, click on “members area”, then click on “awards”, then choose “President’s Triple Crown Program”. Under the heading criteria, you can select to see your recruitment standings or your Operation Shout standings. For your HUPAC standings, you’ll have to contact either Dan Hart, Tulsa HUPAC Chair or Susan McGinnis, State HUPAC Chair.

Your NAHU Board of Trustees have all committed to being 100% Triple Crown. They’d like to see each member reach this goal and encourage you to check your standings and reach for the crown. For additional information, or for assistance with checking your standings, please contact a member of your local membership team, Dee Sink (dsink@theholmesorg.com), Lance Thompson (rlthompson@cvtv.com) or Zane Whitlow (zane_whitlow@aric.com). You can also contact your Oklahoma State Membership Team, Lisa DeRycke (lisa@benefitsok.com) or Colleen Stephens (cstephens@rogersbenefit.com).

Good Luck!”





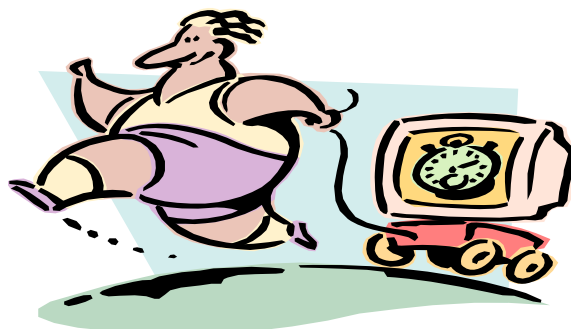
Attention All Brokers!!!

We are now accepting sponsors for the TAHU Walk for Wellness to be held Saturday, April 28th , 9-10 am at LaFortune Park. We anticipate our very own Commissioner Holland, Governor Henry and Tulsa Mayor Kathy Taylor to join us in this community event. There will be advertisement (to include sponsors) in various newspapers / publications.

TAHU's vision is for brokers to not only sponsor, but also invite their employer clients to join in the effort and encourage their employees to participate. Good Samaritan Health is the charity we are helping and partnering with. They will receive 100% of the registration fees! We will have various wellness related vendors and raffle prizes at the event too!

There are limited sponsor spots available. In fact, the "Nutrition After the Walk" has been taken! Attached is the Sponsorship Form. If you are interested in being a part of this big event, please complete the form and fax to Alicia Tiefenthaler at 579-6360 right away!

Phase I is filling all the sponsor spots. Phase II will focus on participation and begin in February 2007.





TAHU Walk for Wellness

... because you're worth it!



April 28, 2007@ 9-10 am - The Gardens at LaFortune Park

A portion of net proceeds will be donated to Good Samaritan Health.

They provide free "whole person healthcare" for those in need!

For more information visit their website at www.goodsamaritanhealth.com.

SPONSORSHIP PACKAGES

(3) Sprint Level Sponsors at \$2,500

- Corporate name in large print on t-shirt
- Four participant entries including t-shirts
- Website advertisement for 3 months
- Acknowledgement in next RHUster newsletter
- Recognition at every General Membership Meeting (until event)
- Press Release
- Signage at event
- Option to donate logo giveaways items to participants

(1) Water Hole Sponsor at \$500:

- Corporate name on bottles to be given out at event
- Acknowledgement in next RHUster
- Recognition at every General Membership Meeting (until event)

(5) Running Level Sponsors at \$1,000:

- Corporate name in medium print on t-shirt
- Two participant entries including t-shirts
- Website advertisement for 30 days
- Acknowledgement in next RHUster
- Recognition at every General Membership Meeting (until event)
- Signage at event

Walking Level Sponsors at \$500:

- Corporate name in small print on t-shirt
- Recognition at every General Membership Meeting (until event)
- Signage at event

(1) Nutrition After The Walk at \$250:

- Acknowledgement in next RHUster
- Recognition at every General Membership Meeting (until event)
- Signage at event

Sponsor Name: _____

Address: _____

Phone: _____ Fax: _____ Email: _____

Contact Person & Title: _____

Please reserve the following Sponsorship:

- Sprint Level (\$2,500)** **Running (\$1,000)** **Walking (\$500)** **Water Hole (\$500)** **Nutrition After (\$250)**

Please fax this completed form ASAP to: Alicia Tiefenthaler at 918-579-6360

Direct all questions to: Sydney Briley at 918-638-7198

Recruit a Member – You Could Be a Winner!

NAHU 2006 END OF YEAR MEMBERSHIP CONTEST

Small Chapters (1-100) – Increase your membership by at least 5% (minimum of 5 new members) between October 1 and December 31, 2006, and get a ticket in the hat for a chance to **win \$500 in NAHU Bucks.**

Large Chapters (101+) – Increase your membership by at least 5% (minimum of 10 new members) between October 1 and December 31, 2006, and get a ticket in the hat for a chance to **win \$500 in NAHU Bucks.**

Recruit 1 - 4 new members between October 1 and December 31, 2006, and your name will automatically be entered into the Grand Prize drawing for **\$100 American Express Gift Card.** Recruit two new members, your name goes in the drawing twice; recruit three members and, well, you get the picture.

Recruit 5 - 9 new members between October 1 and December 31, 2006, and your name will automatically be entered into the Grand Prize drawing for **\$500 American Express Gift Card.** Recruit five new members, your name goes in the drawing five times; recruit six members and your name goes in the drawing six times, etc.

Recruit 10+ new members between October 1 and December 31, 2006, and your name will automatically be entered into the Grand Prize drawing for **\$1,000 American Express Gift Card.** Recruit ten new members, your name goes in the drawing ten times; recruit eleven members and, well, you get the picture

Drawing for the Grand Prizes



The more members you recruit, the better your chances of winning.

The recruitment program is valid only for new NAHU members, not renewals. The referred member must not have been a member of NAHU for the 3 months prior to the application date.



“ MAKE IT HAPPEN ”



TAHU

General Membership Meeting January



Date: January 18th 2007

Time: Registration- 11:15

Lunch- 11:30

Program- 12 to 1 pm

Location: Cedar Ridge Country Club

10302 S. Garnett, Broken Arrow, OK 74011

Phone # 918.252.2501

Cost: - **RSVP**: \$20 members / \$30 non-members

Cost – **At the Door**: \$25 members/ \$35 non-members

Speaker is: Kathy Mitchell

Discussing: HIPPA Overview

1 CE Credit

RSVP online at www.oktahu.com.

Questions can be referred to Debbie Crall, TAHU

Programs Chair, at Deborah.j.Crall@iibltd.com

Remember to RSVP early, as the seats go quickly