

2012
July
Newsletter



Can't Find What You Need In "Life?"

Ever tried to track down an old life insurance company to see if there's any coverage in force for a relative who's lost a loved one? Help has recently arrived for those frustrated in the hunt for existing life insurance policy information. The Oregon Insurance Division's new Life Insurance Finder Tool (LIFT) is up and running. After months of planning, Oregon now is one of a handful of states to offer a tool of this type to help match people who are searching for missing life insurance/annuity policies with the companies that sell them.

Here's a link to the webpage consumers should visit : insurance.oregon.gov/consumer/life-insurance/life.html. Families using this tool simply provide the Insurance Division with basic information about their deceased family member. That information is then relayed to the 300-plus companies that sell life insurance in Oregon. The companies search their databases and report their findings through an online system called iReg that insurers already use to pay taxes.

If the companies find any active policies, they also contact authorized representatives. Families who are searching for missing policies receive a link to a secure webpage where they can see all the companies that have checked their databases and the results. Complaints can also be reported if a search request is still pending after 60 days.

You can be a real hero to anyone frustrated by an inability to find the missing piece of to the life insurance puzzle. And, remember, we also can help you and your family find life insurance that fits your changing needs.



Derek Ames,
Agent

Andy Thanks You For Your Friendship!



Andy Rosson joined our agency in 1986 after a distinguished career as an insurance company employee and independent agent. It was the beginning of a friendship and business relationship that has spanned the decades! Andy came to work with a passion to always serve his customers independently; a desire to always do "what's right" for the customers who entrusted us with their financial security.

He's instilled that sense of honesty, integrity, and diligence to duty in every colleague who's crossed his path or entered his office to seek sage advice. Customers have insisted he's their insurance guy and have referred legions of friends and relatives to him as he helped guide our company.

So, there's a certain sense of loss as Andy advises that it's time for him to slow down his professional pace. While continuing to maintain an office, Andy will be spending more time with his wife, Marge, their dogs (Max & Ruby), and 11 grandchildren. It's difficult for any of us to believe Andy can ever fully separate himself from his life's work. And, he assures us that he has spent the last months preparing for the day when he passes the day-to-day torch to his very qualified and hand-selected colleagues, who will also work with his customers when he's not in his office.

Many of you know that Andy's son, Bob, joined our firm in 1994. But, Andy has also been an insurance father figure to each and every one of our agents at all three offices. Although his hair hasn't turned steely grey from time or tension, his counsel has been sought both internally and externally. He even served as Northwest Region President of Safeco Insurance Company's President's Advisory Council. Andy was nationally recognized by Safeco when the company bestowed on him their highest agent honor nine times: The Award of Excellence!

While many of us have awkwardly faced the retirement of our trusted doctor or dentist with trepidation, Andy cautions us not to panic here. He's not entirely leaving our agency, and promises to still check on his customers who've become "like family" over the years. In Andy's case, your relationship is more than business...it's friendship first! You'll be receiving a note from Andy soon introducing the agent he's personally selected for you when he's out of the office. We know you join us in wishing him some fun trips, long dog walks, and some good rounds of golf when he finds the time!

You Left 'Em Smiling!

Thanks to all who referred their friends and relatives to our agency in the first quarter of 2012! Because you shared our name, **The Friends of Creston Children's Dental Clinic were presented a check for \$510.00!**

A group of concerned dental professionals adopted the free dental clinic inside SE Portland's Creston School when it's future was threatened about 5 years ago. For many of these kids, Creston is the first time they have seen a dentist.

While operating on a small budget with an all-volunteer group of dentists, hygienists, and assistants, the services provided are every bit as complete and professional as those provided by your own dentist's office. The clinic depends almost entirely on individual contributions for supplies, equipment, and other operating expenses. Volunteer board member Barry Rice advises that the money our agency customers helped raise will allow the clinic to treat 25 children who otherwise would lack oral health care. And that's something we can all smile about. Thanks to you for making a difference in the lives of so many kids already this year!

New Quarter's Charity: Theodore Roosevelt Women's Scholarship.



L to R: Barry Rice, Erica Soto,
John Timm



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In a moment of insanity, I switched to another agency to consolidate home owners and car insurance. Within weeks, this new agent managed to get my home owners insurance canceled, and I only found out after I'd been without insurance for eight days. Panicked, I called Susie Ames. She immediately made the calls and faxed the documents to get my insurance reinstated, and has been diligent in following through to sort out the massive confusion caused by the other agent's incompetence. I will never change agencies again." — **Rosalie Key**, Portland



Summer Beckons ...

Many of you like to fill a relaxing summer day by visiting the many Farmers Markets dotting our communities. The opportunity to find farm fresh produce, support

local artisans, sample festival foods and enjoy live music outdoors beckons us to these locations near our offices:

Broadway Office – Irvington Farmers Market

Sundays 10:30 am – 2: 30 pm, May through October 7
NE 16th Avenue between NE Broadway & NE Weidler
NE Broadway SUMMER SUPER SALE – July 20, 21, 22

Peninsula Office – Cedar Mill Farmers Market

Saturday 8 am – 1 pm, May through October
NW Cornell @ Sunset Park & High School

St Johns Office– St Johns Farmers Market

Saturdays 9 am – 2 pm, June through October 15
St Johns Plaza @ N Lombard & N Philadelphia

Referral Rewards Heat Up!

Our Referral Rewards Program continues to recognize your kindness in sharing our name with family and friends. If your referral calls us, you've automatically earned:

- \$10 Starbucks, Washman, or Kaady Car Wash gift card
- \$10 donation to our Charity of the Quarter
- Entry to our monthly \$50 McMenamins gift card drawing
- Entry for a chance to win the \$500 year-end drawing
- Congratulations and thanks to our 2012 monthly McMenamins gift card winners: John Dorfer, Dar Krambule, Darlene Gibson, Neil Jensen, Dianne Harrington

How to Spend Hot Summer Days?

Greg Bair – Easy for me...high tide at Hood Canal, jumping off the bulkhead into the cool saltwater.



Kim Hanlon – My favorite place on a hot August day is in our own backyard with the kids and family, sliding down the inflatable water slide to keep cool and eating BBQ hamburgers, hotdogs, enjoying cool drinks and popsicles.

Susie Ames – Skamania Lodge for scenic views, comfortable lodging and outdoor activities. Not far from town but far enough to feel like a vacation.

Ramona Taylor – My favorite thing to do is spend the day at the Oregon Zoo or at the Lincoln City on the beach.

Kim Thomas – Silverwood Water Park in Coeur d'Alene, ID is one of our favorite places! There are plenty of rides and ways to stay cool for the kids. Mike and I enjoy the beautiful scenery and hiking around the lake. It's worth the trip!

Andy Rosson – We look forward to going to Gearhart, Oregon. Gearhart House has everything for a family: indoor pool and Jacuzzi, the beach, golf across the street. Now an even more attractive destination since the renovation of the golf course, rebuild of the clubhouse, addition of the McMenamins' Sand Trap pub and new hotel!

Derek Ames – My family has a tradition of renting a lake house in Eastern Washington that always offers good times, great food, and a chance for young cousins and older "kids" alike to enjoy water sports and fun in the sun! The conversations around the bon fire and S'mores make for memories I relish.

Coffee & Coverage: Iced Is Nice!



We're continuing take the chill off your insurance concerns by sharing information at our popular customer sharing series. This month, we gather near the epicenter of coffee quakedom... at our NE Broadway office in the shadows of Peet's Coffee, Café D'Arte, Grand Central Bakery, and Starbucks. We'll even offer iced coffee to provide a soothing summer change if you bring your questions about coverage and ways to protect yourself using the products you're already buying. Knowledge is power, and we like powerful customers. Simply reserve your seat by calling us now and we'll put your coffee on ice!

FRIDAY, JULY 20 at 9am – 1615 BROADWAY – 503-288-8818