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Letter from President



Darlene Banogon 2014-2015 Corporate President North Island Credit Union, EWI of San Diego

This is the season for wrapping gifts, spending time with family and friends, baking favorite family recipes, a magical time for children and a time of hope and joy. Holiday lights are everywhere and stores are brightly decorated. For some there is snow and for others like me, Santa is seen surfing at the local beach. During this time of year there's a lot of hustle and bustle, too many events, and not enough time to do everything. But I hope everyone will take

some time and reflect on the joy in their lives. Take time to remember your most memorable Christmas. Mine was when I was eight years old; my parents had just sold our home in Savannah, Georgia and were getting ready to move the family to California in January. That Christmas we stayed at my great-grandparents' home. Now, my great-grandparents are Jewish so you can imagine how it felt for me and my two brothers, who were used to having a Christmas tree for Santa to leave us presents under. We were just so sure that Santa wasn't coming to Nana's house. But on Christmas morning we woke up and Santa had made a spot for each of us in a separate corner of Nana's living room. There were our Christmas stockings and presents from Santa. Santa had found us!

There is so much hope that surrounds this season. **John F. Kennedy** said "We should not let our fears hold us back from pursuing our hopes" and **Pope John XXIII** said "Consult not your fears but your hopes and dreams". My hope for EWI this holiday season is that we will grow stronger this year with the help of all our Chapters and members.

The board recently met in Phoenix, at member firm Arizona Grand Resort, for three days of meetings. We had the pleasure of meeting with some of the EWI of Phoenix board members during our trip and also had a very productive conference call with David James Group (DJG), the marketing firm that has been hired to assist EWI in putting together a campaign to help chapters in recruiting new members. Our main goal continues to be strengthening our core membership and keeping our members apprised of what is going on in EWI. With that in mind, here are some updates:

- Leadership Council: At LCAM, I mentioned that EWI would be holding Leadership
 Council meetings throughout the year. The first will be held for Chapter Presidents and
 Vice Presidents on December 10 at 3:00 pm ET; 2:00 pm CT; 1:00 pm MT; Noon PT
 and 9:00 am HT. On the agenda for this meeting will be the 2013-2014 Year-End
 Financials, which will be posted on the website prior to the call; the LCAM survey;
 Individual Membership; revised scholarship applications and an update on the
 marketing campaign.
- EWIConnect Award changing to Communications Award: This year the
 EWIConnect Award will be changed to a Communications Award and will include not
 only ensuring the Chapter newsletter is using the correct EWI branding, but that the
 Chapter websites are up to date and that the chapter is using some type of social media.
 I've noticed some Chapters' websites have not been updated in a few years. So I urge all
 chapters to start updating their websites.
- Collegiate Program: The Board has approved three potential Collegiate Chapters for 2014-2015; The College at William and Mary, Williamsburg, VA; The University of Missouri - Kansas City, MO; and Temple University, Philadelphia, PA. Director Ihde and Lindsay Pierce, EWI Collegiate - University of Missouri are beginning to work with students from these schools to start the process.
- Dues Renewals: The dues renewals are underway for the year-end renewals. I've
 been hearing from members how easy the process is. It's important that the Chapters

In This Issue

Christmas Gift Ideas
Individual Membership Info
Professional Development
Article
EWIConnect Correction

Save the Date for Professional Development

Stop Competing & Start Creating
The Life You Want to Live
Tuesday January 6 - 3:00pm ET
Register Now

The November webinar hosted 193 participants. Congratulations to EWI of Dallas and San Antonio for having the most attendees on the November webinar!

Recruitment Tip of the Month

It's all about "T-I-M-E"

How easy is that to remember? Regardless of which marketing tools you choose to use (websites, social media, webinars, email, etc.), make sure it has "TIME" ingredients.

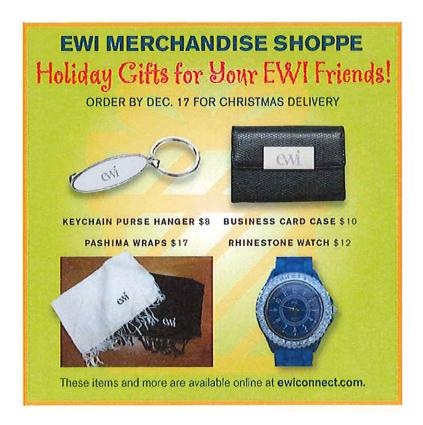
Read on to discover the TIME principles for use as you analyze and improve your marketing efforts you will follow a path that will lead to success.

READ MORE >>

review the reports from the Corporate Office and follow-up with their members to ensure renewals.

 Year-End Compilation/Audit: These reports for both EWI and the EWI Foundation are due into the corporate office by December 31 for the period of October 1, 2013 - September 30, 2014.

I wish all of you a joyous Holiday season. Enjoy making memories with your loved ones. Nothing is more important than the people in our lives and our relations with them. As you start your new year, think of this quote from **Zig Ziglar**: "January 1st is the first page of a 365 page book; write a good one!"



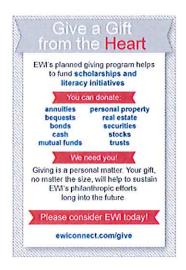
Who qualifies for Individual Membership?

The Corporate Office and Board have been receiving questions about the new Individual Membership category. Let's take moment to discuss one of the major questions. Who qualifies for Individual Membership? The official Chapter Bylaws on the Individual membership category reads:

B. Individual Member. The Chapter shall have the option of including the Individual Member class of membership. An Individual Member shall be <u>an employee of a business</u> which is not a Member Firm of the Chapter.

The key words here are "an employee of a business". Chapters cannot have a Standing Rule that is in conflict with a Bylaw. The Bylaw allows for Individuals who are employed only. If you have written into your Chapter Standing Rules to allow for an individual who is currently unemployed or retired that is in direct conflict of the Chapter Bylaws and needs to be removed from the Chapter Standing Rules.

An Individual Member has all the rights of an active representative of a member firm and the Corporate assessment are the same as the first representative of a member firm. An Individual



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member has the right to vote, serve as a Chapter Officer or Director, and to serve on the Corporate Board.

The only way an individual who is not employed can be a member of EWI is either as a Transitional Member, providing the Chapter has provided for a class of Transitional Members in its Standing Rules (because as of this year's Annual meeting, the Bylaws no longer contain a provision for a class of Transitional Members) or as a Sustaining Member. Sustaining membership does remain in the Bylaws and states:

C. Sustaining Member. A Sustaining Member shall be an individual who has been a Representative in good standing immediately prior to retirement from a Member Firm. A Sustaining Member shall have no voting rights and may not serve as an Officer or Director. A Sustaining Member may attend all membership meetings and functions. A Sustaining Member may transfer from one Chapter to another should the Sustaining Member move within the boundaries of another Chapter. A Sustaining Member shall be subject to Corporate and Chapter assessments for this membership classification. Should a Sustaining Member return to full-time employment, as full-time is defined by the employer, said Sustaining Member shall no longer meet the qualifications of a Sustaining Member.

If you have any further questions regarding this please feel free to contact Bev Kennedy, Corporate Bylaws Chair at millieo712@aol.com.

Professional Development Article

Basement Dwellers or Penthouse Cheerleaders?

As the new year quickly lands upon us, and we start to think about the need to join a gym and finally get the body we know is hiding beneath our good living layers, or we are desperate to do a new year's cleaning of closets to rid ourselves of what we no longer wear, I encourage you to do the same analysis of the people you surround yourself with. Take out a piece of paper right now and write down a list of the 10 people you spend the most time with. These can be both personally and professionally. Then decide if these Top 10 folks are really basement dwellers or penthouse cheerleaders. Basement dwellers are your negative nellies. They are the first to tell you that you can't or shouldn't, when in reality they are intimidated that you might just be more successful then they could ever dream to be. Your penthouse cheerleaders always start from a place of yes. Whatever crazy idea you might have, they are going to encourage you to make your dream a reality and be waving their pom-pom's in support.

It is important to take regular inventory of the people you are surrounding yourself with on a fairly consistent basis. Whales aren't born with barnacles; the barnacles get stuck to them over time. Friends are the same way. Without setting your basement dwellers free, we allow their voices to become our doubts. Enough already! The great thing about life is that it is yours to design - choose cheerleaders!

Nicole Matthews, CSEP, is Founder and Lifestyle Architect of The Henley Company, LLC., a global event, travel, and lifestyle concierge firm based in San Diego, CA. With the belief that life should be experienced in a big way, she focuses on helping clients to live the life they want and produce the experiences they want to remember. You can lean more tips and tricks from Nicole during the January EWI professional development webinar. Click here to register.

Correction - Professional Development Webinar Committee

In the Corporate EWIConnect - November Edition, Darlis Vauble was incorrectly listed with EWI of Des Moines. She is a member representative with Woodmen of the World Life Insurance Society in EWI of Omaha.

Chapter Anniversaries

EWI of Boise

December 1978 Celebrating 36 years

EWI of Charlotte

December 1963 Celebrating 51 years

EWI of Dallas

December 1951 Celebrating 63 years

EWI of Knoxville

December 1987 Celebrating 27 years

EWI of Philadelphia

December 1969 Celebrating 45 years

EWI of Pittsburgh

December 1963 Celebrating 51 years

EWI of Salt Lake City

December 1953 Celebrating 61 years

Corporate Office Serving EWI Membership

The Corporate Office deepens its commitment and level of service to EWI. We commit to 24-hour turnaround in email reply and answering voice messages, unless the office is closed or the person you need to reach is out for the day.

Wendy H. Cowley Executive Director, COO

Kristine Pepin Managing Director

Brittany Jones Operations & Events Administrator

Vacant Member Services Administrator

Bonny Steele Webmaster

Office Hours: 9:00am-5:00pm MT Email: ewi@ewiconnect.com Phone: 801.355.2800 Address: 3860 S 2300 E, Ste 211

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