



**WESTFIELD  
INSURANCE**

Sharing Knowledge. Building Trust.®

## **Together, we achieve more**

### **The Value of Westfield Agents Association Membership**

As independent agents we are faced with many challenges, and oftentimes our work may feel like a solitary endeavor. By joining the Westfield Agents Association (WAA), you become a member of a community with common goals. As your directors, we speak with Westfield on your behalf, sharing your feedback and questions and working to find solutions to make our relationship with the company even stronger.

### **Our commitment**

The Westfield Agents Association is an advocate for Westfield agents and policyholders, providing creativity and innovation to serve the needs of our stakeholders. The Association creates success through a strong working knowledge of the worldwide financial services industry.

### **We accomplish this by:**

- Making educational opportunities available to our member agencies.
- Participating in strategic planning with Westfield Insurance.
- Interacting proactively with our membership using technology.
- Fostering the unique and valued partnership between Westfield Insurance and the Westfield Agents Association.
- Acting as a catalyst for innovative change.

### **As a member of the WAA community, you can:**

- Voice your concerns – and those of your customers – through our board members, who represent you in one-on-one discussions with Westfield leadership regarding compensation, perpetuation and other issues concerning today's agents.
- Join us in-person or view a webcast of our Agents Association Annual Meeting, featuring educational speakers on topics you care about (in conjunction with the Westfield Annual Meeting).
- Save an additional \$1,000 off tuition for TAPP producer school program, an intensive, three-week school featuring product and sales training for new producers, with a focus on perpetuating your agency.
- Save with discounts on everything from educational webinars for Applied users to Dell computers, FedEx and Westfield Group Country Club outings.
- Connect with the Association through the Agents Association web page on Agent's Web Passport to stay up-to-date on information and resources for members.
- Participate where interested on special topic sub-committees to help articulate agents' concerns and work toward solutions.



## A Focus on the Future

The Association is committed to attracting bright, new agents to our business, and developing them to become leading producers and future agency principals. Over the past 15 years The Association Perpetuation Plan (TAPP), a producer training program developed cooperatively by the Westfield Agents Association and Westfield Insurance, has trained and graduated more than 450 agents, and the retention rate is almost twice that of the industry at 57%. In 2006, the TAPP program was expanded to include an Advanced Sales session as an annual follow-up to the producer program as well as additional programs.

In addition, a college scholarship program awards six \$6,000 scholarships each year to benefit dependents of Westfield Insurance employees and dependents of agency employees.

## Your Westfield Agents Association on Agent's Web Passport<sup>SM</sup>

It is easy to learn more about the work of your Westfield Agents Association. Visit our web site on Agent's Web Passport, the agents-only section of the Westfield Insurance site. There you will find updates on projects, educational opportunities, and a place you can ask questions and get answers from our WAA Directors and Westfield leaders. To join the Association, simply return the annual dues notice or use the Contact section to send us an e-mail. We welcome your involvement and appreciate your support.

## Association Board of Directors

Association members are represented by 14 directors (five from Ohio and nine from other operating areas) who are elected to their positions. Directors meet quarterly and convene sub-committees responsible for the key areas of:

### Contracts & Compensation

Agent Members: Scott Franklin, Jimmy Ward, Mark Nelson;  
Westfield Members: Phil Swettenham, Kevin Wermer, Dorothy Barry

### Education

Agent Members: Vaughn Troyer, Tim Dyer, Chuck Naso, David Dulude;  
Westfield Members: Mary Mennell, Connie Frey, Pat Farber, Shannon Ahlborn

### Communications

Agent Members: Chris Ramsburg, Tim Ruhl, Sam Tuten;  
Westfield Members: Gary Christy, Terri Grimm, Katie Herbst

### P&C Initiatives

Agent Members: Tom Flynn, Jane Koppenheffer, Dave Jacobs, Mark Dunham;  
Westfield Members: Jim Clay, Pat Schiesswohl, Nicole Granata, Kristine Neate

The resulting sub-committee findings and recommendations are presented directly to Westfield senior leaders, voicing the needs of both agents and consumers.



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