

Yesterday Today Tomorrow

Basic Insurance and Employee Benefits Research & Resources

Virginia Webb/American College Library
2009 SLA Annual Conference/IEBD Division
June 16, 2009

Yesterday

A very important year!

The Beatles perform in Washington, DC
February 11, 1964

* Image used with permission: <http://www.pophistorydig.com>

Yesterday

• Used with permission: <http://www.pophistorydig.com>

• DVD Clip 7: "She Loves You"

Passport Video/DVD, 2003/Used with Permission.

Yesterday

Dr. Solomon Huebner
1885-1964

- ❖ Founder of the American College in 1927
- ❖ Life Insurance Education Crusader
- ❖ Human Life Value Concept

Yesterday




American College History

- ❖ Dr. Huebner originally affiliated with Wharton School
- ❖ Insurance should be studied as a profession similar to a CPA
- ❖ CLU (Chartered Life Underwriter)-first designation offered

Yesterday

Dr. Solomon Huebner

THE TEACHER WHO CHANGED AN INDUSTRY

TAC Library established in 1937
Archival jewels include:


- ❖ Original papers and manuscripts of Dr. Huebner
- ❖ History of Life Insurance
- ❖ Best's Life/Health Reports from 1906/Complete Set to Present Day
- ❖ L/H, P/C and Fire Insurance Company Histories
- ❖ <http://www.fundinguniverse.com/company-histories/>





June 16, 2009



• Used with Permission. <http://www.here-comes-the-sun.com/>

• I Read the News Today Oh Boy...


Start your Day with Industry Links & News
My Top 3

The National Underwriter Company

- <http://www.nationalunderwriter.com>

ACLI NEWS NOW

- <http://www.acli.com>

Insurance Newscast

- <http://www.insurancebroadcasting.com/today.htm>




Today

- Don't forget (in-print and/or online):
- **Daily Newspapers** (NYT, WSJ, USA Today)/Regional/Local
- **International Newspapers** :London Times, Financial Times
- **Online Television News** :CNN, MSNBC, BBC
- **Newsfeeds** (Bloomberg, Reuters, GoogleFinance, YahooFinance)



Insurance Company Ratings in Today's Uncertain Markets



↑ ↓



Today



- In 2008 ratings actions for the life/health industry were negative
 - ↓ 43 ratings downgrades
 - ↑ 14 ratings upgrades
- Source: Best Week/Business Wire,
9 February 2009



Ratings Resources You Should Know

My Top 3

- AM Best
- <http://www.ambest.com/ratings>
- Fitch Ratings (Great industry surveys)
- <http://www.fitchratings.com>
- Weiss Ratings
- <http://www.weissratings.com>



Today



The INSURANCE FORUM®

Special Ratings issue every September:
Financial Strength of Insurance
Companies



Today

Government & US Statistics and Polls

My Top 3

- University of Michigan Documents Center
- <http://www.lib.umich.edu/govdocs/>
- Gallup Poll (now Free)
- <http://www.gallup.com>
- 2009 Statistical Abstract
- <http://www.census.gov/compendia/statab/>



Statistical Abstract of the United States 2009





Today

**Insurance and Financial Services
Statistics and Facts**

My Top 3

III Factbooks (Insurance Information
Institute)

- <http://www.iii.org/media/websites>



III FACT BOOKS



Also... Insurance Fact Book 2009
(Fee)

and

International Fact Book/PDF
2008/2009 (Free)



Today



**Insurance and Financial Services
Statistics and Facts/My Top 3 (continued)**

ACLI Life Insurers Fact Book

- <http://www.acli.com>

College of Financial Planning ® 2008
Survey of Trends in the Financial Planning
Industry

- <http://www.cffpinfo.com/pdfs/2008SOT.pdf>



**Employee Benefits Statistics, Reports
and Trends**

My Top 3

EBRI

- <http://www.ebri.com>

Crains Benefits.com

- http://www.crainsbenefits.com/data_bank.php



Today



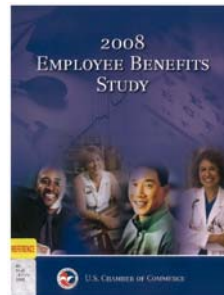
**Employee Benefits Statistics, Reports
and Trends/My Top 3 (continued)**

US Chamber of Commerce/Employee
Benefits (Fee)

- <https://www.uschamber.com/publications/bookstore/2008empbensurvey.htm>



2008 Employee Benefits Study/U.S. Chamber of Commerce



Today



Employee Benefits & Medical Resources

My Top 3

PLANSPONSOR

- <http://www.plansponsor.com>

International Foundation of Employee Benefit Plans

- <http://www.ifebp.org/>



Today



Employee Benefits & Medical/

My Top 3 (continued)

PubMed

- <http://www.ncbi.nlm.nih.gov/pubmed/>



T
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d
a
y

People/Networking Resources/

My Top 3

ZoomInfo

- <http://www.zoominfo.com>

LinkedIn

- <http://www.linkedin.com>

Spoke

- <http://www.spoke.com>



Insurance and Financial Services/ Executive & Company Resources

My Top 3



Financial Yellow Book

- <http://leadershipdirectories.com>

Updated semi-annually/also available/online subscription

Selectory Database/Dun and Bradstreet (Fee)

- <http://www.selectory.com>

Useful for intelligence gathering and marketing/list creation



**2009 Financial Yellow Book/
A Leadership Directory®**



Today



**Insurance/Financial Services
Company Resources/My Top 3
(continued)**

Hoovers (Print & Online/Fee)

[Part of TAC Campus WESTLAW®
subscription here at TAC]

Basic and in-depth reports including Company Overviews,
Key Numbers, Stock info, Officers, Directors, Product
Information, Competitors, Subsidiaries and History.



Fun Fact

- **Surprise** Beatles-related recording about Insurance....☺
- **Take out Some Insurance on Me Baby (If You Love Me Baby)** (2:52) Recorded: June 24, 1961 at Studio Rahlstedt, Hamburg, Germany
Tony Sheridan - lead vocal
John Lennon - rhythm guitar
Paul McCartney - bass guitar
George Harrison - lead guitar
Pete Best - drums
Karl Hinze - engineer



Today

**Agent, Producer and Field
Manager Resources**



TAC Wealth Channel (New!)

- <http://www.thewealthchannel.com/>

Agents Sales Journal

- <http://www.agentssalesjournal.com/>



ProducersWeb

- <http://www.producersweb.com>



Today





With a little help from my friends...



* Used with permission: <http://www.last.fm/music/The+Beatles/+albums>





 **MDRT** 

<http://www.mdr.org/>

- ❖ Proceedings
- ❖ Round The Table
- ❖ Close relationship/support with TAC/ "MDRT Foundation Hall"

✓ Check it out!





 **NAIC**

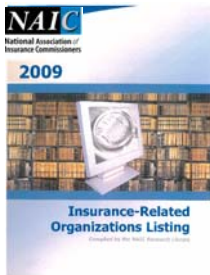
- NAIC <http://www.naic.org/>
- THE source for: Federal/State Insurance Regulations
- 2009 Insurance-Related Organizations Listing (Graphic)


Sorted by subject- check TAC out on Page 7

✓ Check it out!

NAIC Insurance-Related Organizations Listing/ Directory






 **Today** 

- LIMRA- The GOLD Standard <http://www.limra.com>
- ❖ Cutting-edge industry trends and analysis
- ❖ LIMRA Online subscription (Fee)-Industry intelligence TAC highly values
- ❖ Top-rate customer service from Information Center Staff and in-house experts
- ❖ International Research Resource

✓ Check it out!



Today 

Helpful Web & Print Directories/Links/ My Top 3

BankInsurance.com


- <http://www.bankinsurance.com/home/links/insurance-links.htm>

SirNet


- <http://www.sirnet.org> (Some free/some fee)


PC World/Top 100 Incredibly Useful Web Sites

- <http://www.pcworld.com/>




Tomorrow Never Knows..



Tomorrow 

- * Image used with permission: <http://www.last.fm/music/The+Beatles/+albums>



Twitter and Beyond...

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Tomorrow

TECHNOLOGY (Keeping up is vital!)

ZD Net (Free)
<http://www.zdnet.com>

American Association of Individual Investors (AAII)
<http://www.computerizedinvesting.com> (Fee)

Information Advisor (Fee)
<http://www.informationadvisor.com/>

When I'm 64...

Tomorrow

Retirement Resources/My Top 3

Yahoo Finance/Retirement

- <http://finance.yahoo.com/retirement>

National Care Planning Council /Planning for Eldercare

- http://www.longtermcarelink.net/a13information_article.htm

AARP/Ageline

- <http://www.aarp.org/research/ageline/>

Tomorrow

Trends and Research (Anticipate and follow closely..)

My Fab Four

LIMRA

- <http://www.limra.com>

SSRN (Social Science Research Network)

- <http://www.ssrn.com> (Mostly free- some fee)

McKinsey Quarterly

- <http://www.mckinseyquarterly.com> (Mostly free- additional paid content available)

MetLife @ Annual Employee Trends Study

- <http://www.whymetlife.com/trends/index.asp>

The American College

- The future is here at American College...

- [Whserver2\USER\TAC\PUBLIC\MediaServices\Creative_Solutions_Generic.wmv](http://whserver2\USER\TAC\PUBLIC\MediaServices\Creative_Solutions_Generic.wmv)

Yesterday, Today & Tomorrow



Thank you !!



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