

Member Highlight

Please enjoy this Member Highlight of Norm Winer and make a point of introducing yourself to Norm at the next meeting! New Members bring greater diversity to our network of financial professionals and more opportunities for collaboration! Invite a professional you respect to join you at an upcoming program. Information and registration available at www.sfsptwincities.org

Meet Returning Member Norm Winer



I have lived, went through school and worked in Minnesota since birth. I graduated from the University of Minnesota with a Bachelor of Science degree in accounting. After several accounting job's I became a life insurance agent with the North Western Mutual. My accounting experience gave me the opportunity to do joint sales with other Northwestern Mutual agent's.

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Member for 34 years
re-joined in 2015
Retired

In the middle 70's until December 31, 2000 my company, National Benefits Group [NBG] partnered with the largest casualty company in the world selling life insured nonqualified executive benefit plans to the executives of their client's. After a three year non-compete, I formed a new National Benefits company with some of my prior key employee's.

Many of National Benefits Groups recent sales required specially designed products that were sold to companies, including banks, credit unions, employee stock ownership plans & owner buy/sell agreements between partner's, children and employees.

NBG's partnerships includes brokerage general agencies, casualty agencies and professional firms, Our partners would like their agents to be able to



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offer their clients nonqualified benefit plans, but many of their agents are reluctant if they are not familiar with the federal, state, Department of Labor & Security Exchange rules and regulations; as failure to meet the rules can have severe penalties for plan participants and the plan sponsor.

When I'm not working with prospects, I donate time to charity, hunt & fish. I re-joined FSP to take advantage of FSP's programs and to make new business relationships.

Thanks Norm! We look forward to your participation in FSP-Twin Cities!
Membership Co-chairs,

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BUILDING YOUR FSP TEAM



The Society of Financial Service Professionals is a unique organization. It's the ideal place where you can belong to a community of credentialed multidisciplinary professionals, helping you build a team that allows you to deliver the highest level of client service.

Our local Chapters and national society provide exceptional opportunities across the spectrum of financial services

- Committed to relationship building and high-quality education
- Providing personal access to world-class resources and knowledge to help you:
 - Build your professional network
 - Enhance your knowledge base
 - Grow your practice

Visit www.sfsptwincities.org to learn more about membership in FSP and upcoming Chapter events.

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