

## GRAND KNIGHT INSURANCE CHECKLIST FRATERNAL YEAR 2011 - 2012

1. Check State Directory to get name servicing Field Agent or call General Agent David M. Wellmon (1-828-298-3660).
2. Meet with Field Agent to review the following:
  - A. Provide a council roster / telephone list
  - B. Invite to installation of Officers
  - C. Schedule Fraternal Benefits Night
  - D. Review a plan to attain Founder's Award goal (insurance quota required for Star Council) and insurance promotion Insurance Promotion Awards (see Grand Knights Handbook for details)
  - E. Review Wellmon Agency Insurance Achievement Award Requirements
  - F. Place Field Agent on council newsletter mailing list
  - G. Ensure that newsletter editor publishes insurance articles and agent's name and telephone number. (Field Agent will provide articles.)
  - H. Review role of insurance information relative to informing new members at Admission Committee meetings. Send agent copy of Admission Committee form to General Agent with Form 100
  - I. Develop plans to recruit new members and advise agent of 1<sup>st</sup> Degree dates
  - J. Obtain items for council insurance promotion - ie - posters, flyers, display, etc. Agent will provide.
  - K. Invite Field Agents to council activities and introduce whenever he attends
3. Ensure that Financial Secretary:
  - A. Sends original and duplicate copies of the Form 100 for *New Member Insurance* transactions to the General Agent (G.A. has labels) with initial premium and W-9 Form (obtain from G.A.). Only a check from member or a money order accepted. No cash or check from council accepted by home office.
  - B. Send duplicate copy of *other* Form 100 transactions to G.A.
  - C. Is aware that suspension of insurance members affects Founder's Award quotas
  - D. Calls General Agent to advise of any deaths in the council ASAP.
  - E. Calls Field Agent (or General Agent) if any member desires insurance information or has a problem.
4. For additional details, please refer to the Supreme Council Awards portion of the Grand Knights handbook and Surge with Service booklet. Under the Membership Activities section of the "Surge" handbook review the Insurance Promotion section.
5. As Fraternal Year 2011 - 2012 begins, I would remind you that your council Field Agent can be a tremendous resource to assist you in obtaining council membership goals during your term of office. A good communicative, cooperative relationship not only helps the council, but ensures that the council members receive the service that they deserve.
6. Encourage all new members at admission to set an appointment with the Field Agent when he calls.
7. As General Agent for North Carolina I am here to assist you. I can be reached at: 828-298-3660.