



 **AALU?**  Refer a friend
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May 03, 2019





TRANSFORM 2019, an AALU Experience, is in the books! Nearly 1,000 people gathered in Washington, D.C., to challenge ourselves through a continuous improvement ethos. We tried new things and changed the experience. A palpable energy coursed through everyone who participated.

Special thanks to [Courtney Mesmer](#) and [Matt Derrick](#) for leading us all through this fantastic experience. If you joined us, we want your [feedback](#) to make sure 2020 is even better!



Larry Rybka, President and CEO of Valmark, and Christie Corado, SVP and Senior Counsel at Crump, discussing the New York State Fiduciary Rule

Capitol Hill Club Day



Rep. Brad Schneider (D-CO), far left, Rep. Lauren Underwood (D-IL), center right, pose with AALU members at the CHC reception on the roof of the AALU offices at 101 Constitution.

More than **400 financial security professionals** took to Capitol Hill on April 30th and held more than **260 meetings with lawmakers** in Congress. They met with their representatives in Congress to teach them about the importance of the financial security profession and the crucial role advisors play in helping Americans properly plan for their financial futures. We advocated for sound tax policy for life insurance and improvements in retirement security policy that help American consumers understand their savings and access annuities.

We asked every lawmaker to support the SECURE Act (H.R. 1994) and RESA (S. 972). As financial security professionals who help families and businesses secure their financial future, we are committed to addressing the retirement savings gap.



AALU members outside Sen. Marco Rubio's office before a meeting during CHC Day.



Senator Scott was gracious enough to lend a hand in capturing the moment with AALU CEO Marc Cadin and John Watson.

Ambassadors in Action with Senator Ron Wyden (D-OR)



Senator Wyden and AALU President David Byers and his wife Karen.

This past week, Wes Thompson and a number of M Financial Ambassadors hosted an event for Senator Ron Wyden (D-OR) at TRANSFORM2019. The event was a huge success, and the ranking member of the Senate Finance committee really appreciated the chance to reconnect with friends at M Financial. To read a recap of the event, please click below.

[Read more](#)

Ambassadors in Action with Senators Chuck Schumer (D-NY) & Gary Peters (D-MI)



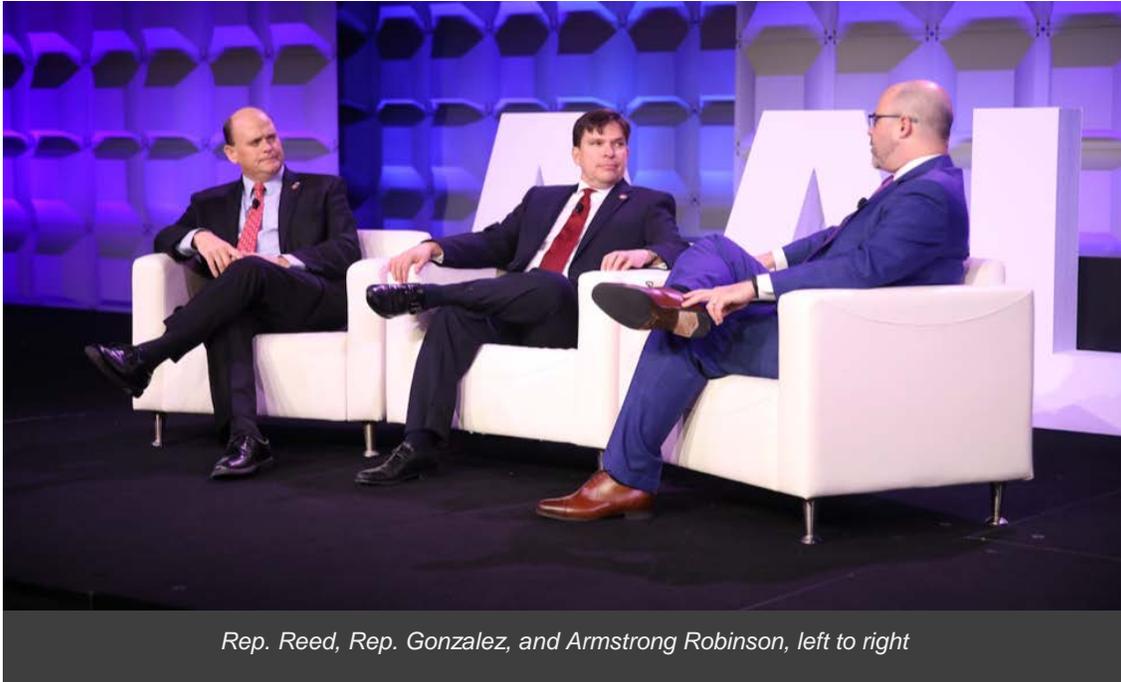
Senator Peters with Brendan Walsh

On Tuesday, AALU ambassadors Brendan Walsh (M Financial), Alex Tuff (M Financial), Nat Perlmutter (Guardian), and Rick Van Benschoten (MassMutual) hosted a dinner with Senate Minority Leader Chuck Schumer (D-NY) and Senator Gary Peters (D-MI), who was a financial advisor for Merrill Lynch for over 20 years. Leader Schumer unequivocally spoke of his support for AALU members and the life insurance profession, remarking how they help Americans save for retirement and noted the country needs more of their advice and products. To read a recap of the event, please click below.

[Read more](#)

Problem Solvers Caucus

AALU VP of Legislative Affairs [Armstrong Robinson](#) interviewed Problem Solvers Caucus members Reps. [Tom Reed](#) (R-NY) and [Vicente Gonzalez](#) (D-TX) on the main stage to gather their experience in the Caucus as well as their outlook on the tax and retirement agenda.



Rep. Reed, Rep. Gonzalez, and Armstrong Robinson, left to right

After the packed session, there was considerable interest in learning more about the [Problem Solvers Caucus](#). Congressman Reed co-chairs the Caucus with Rep. Josh Gottheimer (D-NJ). However, the Caucus does not publish a public list of their membership.

Do you want to know if your representative is a member of the Problem Solvers Caucus? Do you want to support their work? The best way is to reach out your member and ask them. Members of Congress are receptive to the concerns of their constituents, and establishing a line of communication is a good first step in forming a lasting relationship with a Member of Congress.

If you do reach out to your representative, feel free to share any details with our Political Affairs Team. Want to know more about getting involved with your representatives on the Hill? Contact [Josh Caron](#) at (caron@aalu.org).

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