

**MS-368**

**Dayton Association of Life Underwriters (DALU)/National Association of Insurance and  
Financial Advisors (NAIFA) Records**

**Special Collections and Archives  
Wright State University Libraries**

**Processed by:  
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## **Introduction**

The Dayton Association of Life Underwriters were given to the Wright State Special Collections and Archives by Jennifer Hart Schaffer, a member of NAIFA, on August 14, 2007. Two record center boxes (approximately 2 feet) of materials were received. The organization will add to the collection once a year.

The collection includes: minutes from meetings, financial statements, a scrapbook, some photographs, Who's Who directories for Insurance Agents, speeches from presenters and presidents, and awards. The items in the collection deal with the DALU and NAIFA-Dayton.

The majority of the collection dates from the late 1950's until 2007. The majority of the collection is concentrated from the 1970's onward. This collection details the organizations activities both internally and externally in the community.

The deed of gift imposes no restrictions on the use of material(s) in this collection.

The DALU/NAIFA Records are organized into 5 series:

Series I: Administrative

Series II: Newsletters

Series III: Awards

Series IV: Membership

Series V: Outreach & Outings

## **Agency History**

The first time the Dayton Association of Life Underwriters organized was in March of 1904 and was admitted as the 33<sup>rd</sup> association to the national organization, the National Association of Life Underwriters. However, this first effort only lasted until 1910. In 1915 the Dayton Chapter was reorganized and had 48 members and chapter attended the national meetings again. By 1917, membership plummeted to 16, and no delegates were sent to the national meeting and the local organization was in danger of relapsing, but the following year saw an increase in membership to 40. The DALU helped to form an association for the state of Ohio. The organization has grown considerably and it was not until the 1950s that the Dayton Association had serious problems. A turnover of Executive Secretaries and lost records set them back, but they pressed onwards despite the difficulties.

The members met to discuss the current events in their field and invited speakers to present on related topics. Over the years a number of people have spoken on a number of issues and their outreach has included blood drives, visiting high schools, and national ceremonies for the Life Underwriters.

## Scope and Content Note

### Series I: Administrative

The Administrative Series documents the finances and minutes from the meetings of the DALU/NAIFA. This is one of the largest series in the collection. It is rich in details about what the organization was working on and involved with at that time. Throughout the years, it contains the updates with various organizations. There are Minutes from Board Meetings from 1963 until 2007. There are treasurer's reports from 1965 until 1971 (not complete), 1976, and 1978.

### Series II: Newsletters

This section is another of the largest series in the collection. Some of the documentation dates from the early 1960's until 2007. These publications were used to update the membership what was upcoming and to inform them on events that had recently occurred. The newsletters go into greater detail about the events in most cases than the Administrative Series does.

### Series III: Awards

This series contains all of the various awards and applications that the DALU applied for and won. Most of these awards are from the 1990's and beyond. All of the awards are based in the insurance field. The awards applied for and received include the Robert L. Rose Award, Louis Dublin Award, and PR awards.

### Series IV: Membership

This section contains several early membership rosters of the DALU from the late 1950's and early 1960's. There is also a nearly complete selection of Who's Who for the Life Underwriters starting with the 1963-1964 edition. These are published by the Dayton Association of Life Underwriters, Inc. Inside the Who's Who Directory there is a list of the members in the DALU for that year and also a listing of the insurance agents in the Greater Dayton region.

### Series V: Outreach & Outings

This series contains more details on the social events that the DALU sponsored. Many of the events were social outings such as picnics, golfing, and tennis. It also contains information on the DALU members that campaigned for state committees and boards. It has the speeches, contributions, and material used on the campaign trail for the local DALU members. This section also contains the charities and organizations that DALU were involved, such as Carl's Coats for Kids, Community Blood Center Blood Drives, and Angel Tree among others. This section also contains the celebration that DALU had in 1990 for its 75<sup>th</sup> Diamond Anniversary. This part of the Series V includes a history of the organization, speeches from the celebration,

letters from the Ohio House of Representatives, memorabilia and a scrapbook. There is also a small folder on the 85<sup>th</sup> anniversary of the DALU, which includes the agenda, speeches, and another history of the organization.

## Container Listing

<b>Series I: Administrative</b>			<b>Date</b>
<b>Box</b>	<b>File</b>	<b>Item</b>	
1	1	Board Meeting Minutes	May 2007 -Oct. 2001
	2	Board Meeting Minutes	Sept. 2001 -Oct. 1994
	3	Board Meeting Minutes	Sept. 1994 -Sept. 1986
	4	Board Meeting Minutes	Aug. 1996 -April 1982
	5	Board Meeting Minutes	March 1982 -Jan. 1979
	6	Board Meeting Minutes	Dec. 1978 -Jan. 1974
	7	Board Meeting Minutes	Dec. 1973 -Jan. 1970
2	1	Board Meeting Minutes	Dec. 1969 -April 1963
	2	Treasurers Reports	1965- 1971 (not complete), 1976, 1978, 1989- 1999

### **Series II: Newsletters**

2	3	DALU Newsletter	Dec. 1992- Jan. 1988
	4	DALU Newsletter	Dec. 1987- Jan. 1984
	5	DALU Newsletter	Dec. 1983- Jan. 1980
	6	DALU Newsletter	Dec. 1979- Jan. 1975
	7	DALU Newsletter	Dec. 1974- Jan. 1970
	8	DALU Newsletter	Dec. 1969- March 1963

### **Series III: Awards**

3	1	Recognition and Awards Programs and RSVP card	1994-1990, 1988, No dates
	2	Robert L. Rose Award Application and Letter	1995- 1996
	3	PR Award Application	1996-1997
	4	Robert L. Rose Award Application and Letter	1998-1999

<b>Box</b>	<b>File</b>	<b>Series III: Awards</b>	<b>Date</b>
3	5	Louis I. Dublin Award Application and Letter	1998-1999
	6	Association Achievement Award Local Association Application	1998-1999
	7	Louis I. Dublin Community Service Award Application	1999-2000
	8	Robert L. Rose Award Application	1999-2000
	9	Association Achievement Award Local Association Application	1999-2000
	10	PR Award Application	1999-2000
	11	Robert L. Rose Award Application	2000-2001
	12	Louis I Dublin Award Application	2000-2001
	13	Association Achievement Award Application	2000-2001
	14	PR Award Application	2000-2001
	15	Louis I. Dublin Award Pictures	No Date

Series IV: Membership

3	16	DALU Membership Rosters	1951, 1959-1961
	17	DALU Who's Who Directories	1963-1970
	18	DALU Who's Who Directories	1970-1980
4	1	DALU Who's Who Directories	1980-1986
	2	DALU Who's Who Directories	1986-1993
	3	DALU Who's Who Directory	1993-1994
	4	DALU Who's Who Directory	1994-1995
	5	DALU Who's Who Directory	1995-1996
	6	DALU Who's Who Directory	1997
	7	DALU Who's Who Directory	1998
	8	DALU Who's Who Directory	1999

<b>Box</b>	<b>File</b>	<b>Series IV: Membership</b>	<b>Date</b>
4	9	DALU Who's Who Directory	2000
	10	DALU Who's Who Directories	2002, 2004

Series V: Outreach & Outings

5	1	DALU Outings (Golf, Tennis, Family Picnics)	1992-1985, 1982
	2	DALU Campaigns for National Positions	1992, 1994, 1995, 1999, 2000, Undated
	3	Our Ohio Matters	1993-1996, 1999, 2000
	4	DALU 85 <sup>th</sup> Anniversary	2000
	5	DALU information	1968, 1990, Undated
	6	DALU information for 75 <sup>th</sup> Anniversary	1990
	7	DALU Financial Correspondence for 75 <sup>th</sup> and 85 <sup>th</sup> Anniversaries	1990, 2000
6	1	DALU Jubilee 75 <sup>th</sup> Anniversary Scrapbook (Part 1 of 2)	1990
	2	DALU Jubilee 75 <sup>th</sup> Anniversary Scrapbook (Part 2 of 2)	1990
		Oversize Location 71-15	1990