Abstract

Oldest currently active African American-owned insurance company in the United States, founded in 1898 and headquartered in Durham, North Carolina.

The North Carolina Mutual Life Insurance Company Archives documents the development of N.C. Mutual in Durham, N.C., and contributes to the historic record on African American businesses and entrepreneurship in the South and in the United States. Dating from 1850 to 2008, with the majority of the items dating from 1898-2008, the material covers nearly every aspect of N.C. Mutual's operations, management, and milestones. Documents take the form of corporate office files, including the offices of five company presidents; annual statements; reports; surveys; memos; legal and financial papers; original life insurance policies; training material; programs; ephemera and artifacts; and a large number of historical photographs of staff and their families, offices, buildings, and Durham scenes. Significant businessmen represented in the papers include founders John Merrick and Aaron Moore; and presidents Bert Collins, Joseph Goodloe, William Kennedy Jr., William Kennedy, III, Charles C. Spaulding, Asa T. Spaulding, and current president James H. Speed. The collection is especially rich in print material, including many issues of three company publications: The Mutual (1903-1929), The Whetstone (1924-1998), and The Weekly Review (1925-1998). It is also notable for its assemblage of material on United States African American history, and public relations material dating from the earliest years to present times, including advertising ephemera, advertising campaigns, and other related items. Other materials document NCM's outreach to the African American community throughout its history to counter racism, unemployment, and diseases by means of public health programs, church affiliations, mentoring, and scholarship programs. Over one hundred selected digitized photographs and a few documents are also available online. Acquired and curated jointly by the North Carolina Central University's University Archives, Records and History Center and the John Hope Franklin Research Center for African and African American History and Culture at Duke University.
Descriptive Summary

Collection Title: North Carolina Mutual Life Insurance Company Archives, 1850-2008 and undated, bulk 1898-2008
Creator: North Carolina Mutual Life Insurance Company (Durham, N.C.)
Extent: 217 linear feet, approximately 98,000 items
Language of Material: Material in English

Information for Users

Access Restrictions
Files in the Office of the President Subseries are restricted for 25 years from the last year of each presidency. Permission to access these records must be granted by NC Mutual in writing prior to use. Otherwise, contents are open to research. Personnel files found in this series have been separated and are closed for 75 years from the date of creation of the latest material, currently 2074.

Patrons must sign the Acknowledgment of Legal Responsibility and Privacy Rights form before using this collection. Collection has been screened and medical records removed. However, there may be remaining third-party records or information which are subject to privacy laws. Users are responsible for obtaining permission to release or publish personal information.

Original audiovisual materials are closed to patron use. Some use copies are available in the collection. Otherwise, Technical Services staff need to produce use copies before contents can be accessed.

All or portions of this collection may be housed off-site in Duke University's Library Service Center. Consequently, there may be a 48-hour delay in obtaining these materials.

Please contact staff in the Rare Book, Manuscript, and Special Collections Library, Duke University, or in the University Archives, Records and History Center, North Carolina Central University, before coming to use this collection.

Copyright Notice
The copyright interests in this collection have not been transferred to Duke University or North Carolina Central University. For more information, consult the copyright section of the Regulations and Procedures of the Rare Book, Manuscript, and Special Collections Library.

Preferred Citation
[Identification of item], North Carolina Mutual Life Insurance Company Archives, Rare Book, Manuscript, and Special Collections Library, Duke University, and University Archives, Records and History Center, North Carolina Central University.

Provenance
The North Carolina Mutual Life Insurance Company Archives were received by the Duke University Rare Book, Manuscript, and Special Collections Library and by the North Carolina Central University University Archives, Records and History Center as a gift in 2009.

Processing Information
Descriptive sources and standards used to create this inventory: DACS, EAD, NCEAD guidelines, and local Style Guide.

This finding aid is NCEAD compliant.

Accession 2009-0231 is represented in this finding aid.

**North Carolina Mutual Life Insurance Presidents**

- 1898-1919: John Merrick
- 1919-1923: Dr. Aaron McDuffie Moore
- 1968-1972: Joseph W. Goodloe
- 1972-1990: William J. Kennedy, III
- 1990-2003: Bert Collins
- 2004-: James H. Speed

**Chronological History**

- 1883: The Royal Knights of King David, a fraternal organization, formed by John Merrick, John Wright, W. A. Day, J. D. Morgan, and T. J. Jones to provide insurance for African Americans, chiefly for burials
- 1899: North Carolina Mutual incorporated by the North Carolina General Assembly, began doing business selling burial insurance
- 1900: Charles Clinton (C.C.) Spaulding named general manager
- 1901: Dr. Aaron Moore and John Merrick found the Lincoln Hospital in Durham to serve African Americans, with Moore as its first superintendent
- 1903: First full-time insurance agents hired
  
  Launch of first internal publication: *The North Carolina Mutual*
NCM began to buy lots in Durham and build houses for influx of black workers

1907 NCM began issuing ordinary whole life policies in $100, $200, and $500 face amounts

NCM founded and provided capital for Mechanics and Farmers Bank in Durham, to better serve African Americans

1910 Merrick-Moore-Spaulding Land Company formed; as NCM real estate subsidiary, constructed hundreds of low-cost rental houses in African American neighborhoods in Durham

1919 Death of President John Merrick; Dr. A. M. Moore appointed as successor

NCM charter amended, changing the name to North Carolina Mutual Life Insurance Company

1920-1921 Dr. Donnell, new director of Medical Department, organized modern medical facilities in new Home Office

1923 C.C. Spaulding became president after the death of Dr. Moore

1943 The Liberty Ship S.S. John Merrick, named in honor of the company’s first president, was launched from Wilmington, N.C.; participated in the invasion of France in June 1944, making many voyages ferrying troops, tanks and supplies between English ports and Utah Beach; returned to Brooklyn, New York, April 1945

1948 North Carolina Mutual marked its golden anniversary, producing short film, *Success Story*

1950 The company reached its goal of having $200 million of life insurance in force

1952 William J. Kennedy, Jr. appointed president after the death of C. C. Spaulding

1959 Asa T. Spaulding appointed president after William J. Kennedy, Jr.’s retirement from the office

1960 Director of Medical Department, Dr. Donnell, retired, succeeded by Dr. Charles Watts

1966 The company dedicated its headquarters on Chapel Hill Street with Vice President Hubert H. Humphrey as the keynote speaker

1967 The Board of Directors established the Merrick-Moore-Spaulding National Achievement Award

1968 Joseph W. Goodloe became president after Asa T. Spaulding’s retirement from the office

1971 NCM broke into "Billion Dollar League" by having more than one billion dollars of insurance in force

1972 William J. Kennedy, III became president after Joseph Goodloe’s
Inventory of the North Carolina Mutual Life Insurance Company Archives, 1850-2008 and undated, bulk 1898-2008

retirement from the office

1983 Opening of the Heritage Room, a pictorial exhibit of the company's history

1986 The company forms NCM Capital Management Group, Inc. to expand its presence in the financial arena and to diversify its business and investment mix

1987 Director of Medical Department, Dr. Charles Watts, retired, succeeded by Dr. John Daniel, Jr.; several years later, Medical Department is discontinued

1990 Bert Collins appointed president and CEO after William Kennedy III's retirement from the office

1995 Board member Thelma J. Smith was named chair of the audit committee; first woman to head a major NCM committee

1997 NCM licensed to operate in 22 states and the District of Columbia with offices in 11 states and Washington, D.C., and more than $9 billion of insurance in force

1998 NCM celebrated its centennial anniversary

2004 James H. Speed, Jr. appointed president and CEO after Bert Collins' retirement from the office

Collection Overview

The records in the North Carolina Mutual Life Insurance Company Archives document the history of the oldest currently active African American insurance company in the United States. The material dates from 1850 to 2008, with the majority of the items dating from 1898-2008, and covers nearly all aspects concerning the operation, management, and milestones of NC Mutual (NCM). Documents include but are not limited to corporate office files, including the offices of five company presidents; annual statements, reports, surveys, and memos; legal and financial files; original life insurance policies and other documents; advertising, internal and external publications, pamphlets, posters, and other print material; training material; many historic photographs; public relations and outreach material; memorabilia; and audiovisual recordings. The majority of the collection concerns the company's home office in Durham, N.C., although there is a significant amount of material that also relates to NCM district offices located throughout the United States, particularly in Southern states, as well as records that refer to other related organizations such as insurance companies and financial institutions.

Broadly speaking, the company records contribute to documentation on the history of African American businesses in the United States, particularly in the South, and on the socioeconomic status of African Americans in the South in the 20th century. Information on public health issues affecting 20th-century African Americans and public health programming created by NC Mutual as well as other agencies is also present. In addition, through company records and many ephemeral publications such as obituaries, the collection also documents in detail the work status and personal lives of the company's many employees, predominantly African American women and men.

The collection is rich in print material, including many issues of three company publications--The Mutual (1903-1929), The Whetstone (1924-1998), and The Weekly Review (1925-1998). It is also
notable for its assemblage of public relations material dating from the earliest years to present times, including advertising ephemera, material related to advertising campaigns, and other items. Additionally, there are records of NCM's extensive community outreach such as public health, mentoring, and scholarship programs, and documents relating to the company's ties with Durham's churches such as White Rock Baptist, and with other organizations such as Mechanics and Farmers Bank. Corporate office files form the bulk of the collection, covering nearly every aspect of the company's operations and activities from its beginning. There are extensive correspondence files as well as meeting notes and minutes, and many legal and financial reports, as well as surveys of the insurance industry. Material relating to a history of NCM written by one of its presidents, William Kennedy Jr., are located in the Office of the Presidents Series. Company presidents represented most substantially in the files include: William Kennedy Jr. (1952-1958), Asa T. Spaulding (1959-1967), Joseph Goodloe (1968-1972), William Kennedy III (1972-1990), and Bert Collins (1990-2003). Earlier and later presidents and leaders, including founders Merrick and Moore, and presidents C.C. Spaulding and James Speed are represented by smaller amounts of material. Personnel records are also present and are closed to use until 2074, 75 years after date of most recent record.

Several thousand photographs preserved in the collection date from the earliest years of the company and offer important visual documentation on NCM's history, its employees and their families, and on the history of Durham as well. The collection also contains photographs of founders Merrick and Moore and their families, NC Mutual office buildings throughout its history, and many large photographic portraits of senior administration from the earliest years to the most current. Other photos capture employees either in company photographs or at banquets and conventions, throughout the company's history. From these photographs and other images not represented in the collection, North Carolina Mutual created an exhibit space named "Heritage Hall" in its home office devoted to the commemoration and preservation of the company's history; the exhibit images and texts, framed or mounted on board, are also preserved in the NC Mutual Archives.

Acquired and curated jointly by the North Carolina Central University's University Archives, Records, and History Center, and the John Hope Franklin Research Center for African and African American History and Culture at Duke University.

Collection Arrangement

The collection is arranged in the following series, described more fully in this inventory: Corporate History Files (2 boxes), Company Offices (83 boxes), Digital Media (3 boxes), Exhibit Material (25 boxes), Memorabilia and Artifacts (14 boxes), Other Organizations (9 boxes), Photographic Material (23 boxes), Printed Material (51 boxes), Recordings (24 boxes), Social Groups and Events (1 box), and Scrapbooks (6 boxes). There is a large Oversize Material section (over 50 flat boxes and larger oversize folders) containing material from almost all series. The Company Offices Series comprises records from selected offices: Actuary, Agency, Auditing, Controller, Corporate Planning, Executive Committee, Facilities, Medical Department, Office of the President - the largest subseries, Public Relations, and Personnel Files (closed). These subseries are described further in this collection guide.

Subject Headings

These are searchable subject entries for this collection. Performing a search on these subjects in the Duke University Libraries online catalog will bring up other related research materials.

Collins, Bert.
Goodloe, Joseph W.
Kennedy, William, III.
Merrick, John, 1859-1919.
Moore, A. M. (Aaron McDuffie), 1863-1923.
Spaulding, C. C. (Charles Clinton), 1874-1952.
Speed, James.
Watts, Charles De Witt.
North Carolina Mutual Life Insurance Company (Durham, N.C.)
Advertising -- Insurance.
African American business enterprises -- History
African American business enterprises -- North Carolina -- History.
African American women -- Employment -- History.
African Americans -- Diseases.
African Americans -- Employment -- History.
African Americans -- Health and hygiene.
African Americans -- Medical care -- 20th century.
African Americans -- North Carolina -- Durham -- History.
African Americans -- North Carolina -- Durham -- Pictorial works.
African Americans in advertising.
Industries -- North Carolina -- Durham.
Insurance.
Insurance companies, American -- History.
Insurance companies -- Employees.
Insurance companies -- Management.
Insurance companies -- North Carolina -- Periodicals.
Life insurance -- History.
Durham (N.C.) -- Church history.
Durham (N.C.) -- Economic conditions.
Durham (N.C.) -- History.
Durham (N.C.) -- Pictorial works.
Durham (N.C.) -- Social conditions.
North Carolina -- Economic conditions.
Audio recordings.
Calendars.
CD-ROMs.
DVDs.
Ephemera.
Films.
Electronic records.
Negatives.
Photographs.
Slides.
Videos.
John Hope Franklin Research Center for African and African American History and Culture
(Duke University)
University Archives, Records, and History Center (North Carolina Central University)

Related Material
Asa and Elna Spaulding Papers,
Rare Book, Manuscript, and Special Collections Library, Duke University
C.C. Spaulding Papers,
Rare Book, Manuscript, and Special Collections Library, Duke University
Lincoln Hospital Records,
Rare Book, Manuscript, and Special Collections Library, Duke University
North Carolina Mutual Digital Collection,
Rare Book, Manuscript, and Special Collections Library, Duke University
Charles DeWitt Watts Papers,
Rare Book, Manuscript, and Special Collections Library, Duke University
William A. Clement Papers,
Louis Round Wilson Special Collections Library, University of North Carolina at Chapel Hill
Inventory of the North Carolina Mutual Life Insurance Company Archives, 1850-2008 and undated, bulk 1898-2008
List of Series

Company Offices Series, 1850, 1898-2008 and undated, bulk 1920-2000 (83 boxes plus oversize containers)

[The material in the Office of the President is restricted for 25 years from the date of the end of the presidency in question, unless written permission is granted by North Carolina Mutual. The Personnel Files subgrouping is closed to public access for 75 years from date of creation of the most recent record, or 2074.]

Corporate History Files, 1900-2005 (2 boxes)

Digital Media Series, 2000s (3 boxes)

Exhibit Material Series, 1940s, 1960s-2000s, and undated, bulk 1970s-2000s (25 boxes)

Memorabilia and Artifacts Series, 1923-2008 and undated, bulk 1970s-2000s (14 boxes)

Other Organizations Series, 1927-2008 and undated (9 boxes)

[Box 104 contains fragile material and is slated for preservation photocopying. Please contact a reference archivist to use this material.]

Photographic Material Series, 1888-2008 and undated (22 boxes)

Print Material Series, 1903-2008 and undated, bulk 1920s-1990s (51 boxes)

Recordings Series, 1943-circa 1970s (24 boxes and film cans)

[Original audiovisual recordings are closed to use. Use of these materials may require production of listening or viewing copies. Please contact a reference archivist before coming to use this collection. Slated for further preservation and identification work.]

Scrapbooks Series, 1912-1975 (6 boxes)

[Scrapbooks are fragile; some are slated for further preservation treatment. Please contact a reference archivist before coming to use this material.]

Social Groups and Events Series, 1922-1992 and undated (1 box)

Description of Collection

Company Offices Series, 1850, 1898-2008 and undated, bulk 1920-2000

(83 boxes plus oversize containers)

Arranged in the following subseries named after North Carolina Mutual departments and offices: Actuary, Agency in Force, Auditing, Controller, Corporate Planning, Executive Committee, Facilities, Medical Department, Office of the President, Public Relations, and Personnel Files (closed). There is also an oversize section at the end of each subseries or smaller subgrouping. The Office of the President Series holds the records from the following presidents: William J. Kennedy, Jr., Asa T. Spaulding, Sr., Joseph W. Goodloe, William J. Kennedy, III, and Bert Collins. Company office functions and spaces are also represented in other formats in the Exhibits, Photographic Material, Memorabilia and Artifacts, and Recordings Series.
[The material in the Office of the President is restricted for 25 years from the date of the end of the presidency in question, unless written permission is granted by North Carolina Mutual. The Personnel Files subgrouping is closed to public access for 75 years from date of creation of the most recent record, or 2074.]


The records relate to the Actuary Office's responsibilities of risk assessment in life insurance, investments, pensions, and other company activities and policies. Organized into two categories: Reports for the Board of Directors and Executive Committee, and Actuary Files. Actuary files include memos and consultants' studies and plans. The bulk of the material was created in the 1980s.

**Reports for the Board of Directors and Executive Committee**

**Box 1**

- Report of the Actuary to the Board of Directors, 1980-1998 (10 folders)

**Box 2**

- Report of the Actuary to the Board of Directors, 1999-2001 (2 folders)
- Board of Directors meeting minutes with memos from Actuary, 1980-1983
- Executive Committee meeting minutes with memos from Actuary, 1980-1983

**Actuary Files**

**Box 2**

- Federal Home Loan Bank of Atlanta, 1984-1986
- Hay Consultants: compensation study, 1985
- Hay Consultants: incentive plan, 1985
- Industrial insurance system conversion, 1983 and undated
- Jamison, Eaton, and Wood policy statements, 1985
- "Long Range Forecasting and Surplus Study", 1969
- Memoranda and notes, 1986
- Mortgage loan computer systems, 1986
- NCNB investment management, 1985
- "Planning New Horizons", 1986
- Report of the Controller, 1986
- Rolling Hills Associates, 1986
Stellar Communications, 1984-1986

Box 3

Annual statement files, 1974-1987 (2 folders)
Bulletins and memos, 1952
Commercial series, 1977-1983 and undated (3 folders)
Legal agreements, 1980-1983 and undated
National Cable Television Association convention, 1985
Position papers, 1986
WMGB/WQKS, 1984-1985

Box OV1

Commercial series financial statement, 1982

Box OV2

Statements and memos, 1984-1987

Agency in Force Office Subseries, 1850, 1920-1994 and undated

The center of company operations, the Agency in Force Office handles all company sales of policies, and is staffed by agents in the field, their supervisors, district managers, and home office representatives. By 1948, the company already had over 1,000 agents in force throughout the South. The material of this subseries includes Executive Committee directives and decisions, agency-related files and ledger books, and the G.W. Cox papers. The Agency files contain salary information, several issues of *The Weekly Review*, memos, and manuals. The subseries also contains policy loan certificates and claims dismissal correspondence with the Receiver from Woodmen Union Life Insurance Company.

[Materials in Box 3 and 4 are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

Box 3

Certificate of membership policy, Amey Husband, 1902 Oct. [photostat copy - reduced size]
Policy loan certificates, 1923-1937 (7 folders)
Correspondence regarding Woodmen Union Life Insurance Company and policies, 1921-1937 (2 folders)

Box 4

Correspondence regarding Woodmen Union Life Insurance Company and policies, 1931-1937 (8 folders)
G.W. Cox papers, 1936-1957 (7 folders)
Box 4-A

Policies, circa 1930s

[Materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

Box 4-B

Policies, circa 1930s

[Materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be further processed before being handled.]

Box 4-C

Policies, circa 1930s

[Materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be further processed before being handled.]

Box 4-D

Field Bulletin Book No. 1, 1922-1957

Memos to agents in field, #1-252, were filed in binder with Asa T. Spaulding's initials. Appears to be complete run. To better preserve contents, the memos were disbound and foldered. Arranged in reverse chronological order.

Box 5

Executive Committee directives and decisions, 1956-1984 (14 folders)

Executive Committee memos, 1985-1988

Box 6

NCM Agent's manual, circa 1965

John T. Carey papers:

photos for Spartanburg, SC district, 1960-1971 and undated
retiree correspondence and information from L. B. Frasier, 1984-1986
certificates for community service, 1981-1983

Box 7
Annual statements, 1921-1927, 1947, 1958
Job duty charts, undated
Managerial training, undated
NCM "Digest of Union Contracts", 1966-1969
NCM forum, 1956
New home office, 1962-1966
NIA Institute in Agency Management conference, 1959
Salary scales and wage memos, 1920-1954 (3 folders)
Weekly Review, 1929-1937 (5 folders)
"Manual of Instructions", 1975-1977 and undated (2 folders)

Box 8
"Manual of Instructions", 1975-1977 and undated (3 folders)
Letter from B. W. Kennedy - legal competency of minors, 1937
Letter from B. W. Kennedy - regarding claims signed by practitioners other than licensed physicians, 1955
Memos and letters, 1992 May-Dec.
Binder of home addresses, 1978
Binder of memos, 1988
Personnel binder: transfers and terminations, 1991-1992
[Removed to Personnel Subseries.]

Box 9
"You and Your Company" binder, after 1965
Memos and letters, 1989 Jan.-1991 July (4 binders)

Box 10
General ledger, Mr. McClinton, 1971-1979
Blank form - application for life insurance, circa 1994
Industrial agent contract, undated

Box 11
Memos, 1968 Jan.-1969 July
Office Workers Union contract, 1952
Ordinary agent's contract (special), undated
Regular ordinary agent's contract, undated

Box OV2
North Carolina Mutual Life [Raleigh] policy, 1850 with letter attached, 1969
Mailed to NC Mutual's offices in 1969 by an executive in Baltimore, this life insurance policy was sold by an insurance organization in Raleigh by the same name, which organized in the 1840s and disbanded in the 1860s. A blank life insurance policy on a slave printed by this same company also exists in the Charles Hunter Papers in the Special Collections Library at Duke.

Box OV3
Life insurance policies, 1921-1926 (3 folders)
Matted life insurance policy, 1941
[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

Box OV4
Policies, 1921-1926 (3 folders)
Laminated policies, 1913, 1919, 1935
One million and a quarter drive chart, mortgages to go to Century Life, 1919, 1927
[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

Box OV5
Training records and reports, 1962-1963

Box OV6
Ledger, 1967-1986

Box OV7

Box OV8
*A Birds-eye View of the Manager's Job*, undated
Blank policy, circa 1952

Includes files relating to audits of NCM and its district offices, as well as material from the NCM Audit Committee. Audits were conducted by outside firms such as Deloitte, Haskins, and Sells and Ernst and Ernst.
Box 11

Accountants and other correspondence, 1980
Accounting audits, NCM, 1983-1987
"BC Audit Committee, 1980" (2 folders)
Deloitte, Haskins, and Sells:
   Financial statement reports, 1981-1983
   NCM reports, 1981-1982
   Reports for NCM, 1981-1985 (2 folders)
Ernst and Ernst: CPA review of NCM, 1972-1973
Internal auditors home office audits, 1980

Box 12

NCM Audit committee:
   Agendas, 1980
   Meetings, 1982-1985 (9 folders)
   Miscellaneous documents, 1979-1981
NCM internal audits, 1974-1984 (2 folders)

Box 13

PA audit, 1982
Regular audits, 1980

Box OV4

Financial statements and data, 1904-1905, 1922-1944
Financial statements, underwriters' pocket charts, death claims paid, 1922-1950
Financial statements, ordinary mortality experience statements, NIA questionnaire, 1927-1941
[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

Box OV9

Ernst and Ernst checklist, undated

Controller Subseries, 1945-2001 and undated

The Office of the Controller is in charge of coordinating, planning, and reporting on financial activities, including bookkeeping, accounting, and financial reporting. The material in this subseries consists of the "Report of the Controller to the Board of Directors" for NCM, ranging from 1986-2001. Also contains annual reports, annual statements, and Bonds and Stocks Owned
statements.

**Box 13**

NCM federal income tax return, 1995 (2 folders)

**Box 14**

"Abstracts from the Tenth Annual Statement", 1908
Bonds and stocks owned, 1945-1978 (2 folders)
Ratings and rankings from Best's and National Underwriter, 1964-1986

**Box OV4**

Annual statement, 1960

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]


(9 boxes)

Contains detailed materials on the research, planning, execution, and progress of the construction of the new Mutual Plaza home office, including blueprints for the home office and the Chatham annex. Also includes plans for organizational and management restructuring, business plans by company department, reports, manuals for the functions and duties of home office organization, reviews of data processing, and correspondence with management consulting firms and other companies. Additionally contains alphabetized files regarding general correspondence, solicitation, and donation requests. Includes information regarding Murray Marvin (one of the directors of Corporate Planning) during his time at both Jackson Mutual and NC Mutual. Note: The structure of the Corporate Planning department changed several times over the course of NC Mutual's history. Corporate Planning and Public Relations merged under Murray Marvin in 1967 and was reorganized into Planning and Communications around 1976.

**Box 15-24**

Corporate Planning files

**Box OV2**

Floor plans, undated (2 folders)
Clipping, 1966

**Box OV8**
Monthly review of office construction and costs, 1965
Clippings, 1970

**Box OV10**
Display panel and blueprints, 1952-1958
Blueprint, Mutual Plaza (?), circa 1960s

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

**Folder 4**
Very large blueprints, 24x36" (5 items)

**Executive Committee Subseries, 1922-2003 and undated, bulk from 1972-1989**
[RESTRICTED]
Mainly pertains to business conducted by the Executive Committee, a standing committee of the Board of Directors, which is made up of a minimum of five Directors, at least one of which is required to be an outside Director. Material from the Salary Committee, another standing committee of the Board, is also included in this subseries. The Salary Committee consists of five of the Directors, one of whom must be the President of the company.

[Subseries is restricted for 25 years from date of last created folder, or 2028; until that date, written permission must be given by donor before contents can be accessed.]

**Box 25**
Housing project for home office employees, 1948
Minutes of Budget Control Committee, 1928-1944
Mrs. W.D. Hill, 1945
Bessie Whitted mortgage, 1952
D.C. Deans, Richmond City Council, 1952
Board of Directors, 1927-1952
Gaillard correspondence, 1970
Committees, 1941-1972
Great Lakes region, 1972-1975
Good Citizen Life Insurance Company, 1973
Miscellaneous papers, 1922-1938 and undated
Response to *Business Week*'s "Upheaval in Life Insurance", 1984
Minute book of Budget Control Committee, 1928-1944
Salary Committee:

Hay Associates compensation study, 1985
Clerical salary adjustments, 1972-1984
Nominating Committee, 1987-1988
Merit increases and promotion recommendations, 1987-1988
Agency regional bonuses, 1976-1990
Board meeting, 1983
Data processing job descriptions, 1979-1989 and undated
Performance standards worksheets, 1973-1975
Annual Statement Committee, 1979-1981
Employee retirement dates, 1975-1981
Net annualized premiums, 1975-1976
Notes, charts and memoranda, 1978-1991 and undated
Salary information, 1979
Salary charts, 1980-1983
Clerical salary adjustments, 1973-1988
Salary increases, senior officers and directors, (J. W. Goodloe on cover), 1977

Box 26

Salary Committee:

Charity fund committee, 1931-1932
John C. Blackman claim, 1972
Salary Study, 1956
Memoranda, charts, guides, and notes, 1988-1989
Notes, memoranda, and charts, 1986-1988 and undated
Agendas and memoranda, 1989-1990 and undated
Officer and administrative salaries, 1969-1985 and undated
Charts and memoranda, 1987-1988
Proposed budget, 1987
Salary forms, undated
Salary breakdown by department, 1977-1986
News clippings, 1985
Annual statement and proposed budget, 1985-1986
Home office salary schedules, 1924-1964
Salary memos, 1926-1958
Salary adjustment notes and charts, 1989
Salary charts, 1976-1981
Salary adjustments, 1969-1989
Salary increases, early retirements, position cuts, 1989-1990
Salary increases, etc, 1981-1988

Box 27
Salary Committee:
Salary increases, etc, 1981-1988 (2 folders)
Salaries, 1960s-1970s
Salary increases, 1980-1982 (2 folders)

Box OV1
Officers' salaries, 1946-1964
Officers' salaries and operations analysis, 1974, 1989

Box OV8
Drives letter, 1922 Feb. 1
Envelope with notes and directions, undated
Good Citizens Life Insurance Co. agent report, 1973
Financial statements of other companies, income and investment table, 1952-1955
Salary expenses and increases by district, 1980-1985
Salary worksheets, reports, and bonus projections, 1977-1980

Box OV10
Assets and stocks of life insurance companies, salary study, 1969
[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

Contains material concerning the home office at Mutual Plaza. It includes photos of the construction and dedication of Mutual Plaza, as well as blueprints, manuals, guides, and reservation forms. It also includes a Department of Housing and Urban Development (DHUD) award for building design. Arranged in original order as received.

Box 28

*The Whetstone*, Mutual Plaza issues, 1963-1964

New home office - programs, promotional material, and invitation, 1963-1966

"Moving to Mutual Plaza" manual, 1966

Construction of Mutual Plaza photos, 1963-1964 and undated (12 folders)

"Dedication - Mutual Plaza", 1950-1966 and undated (3 folders)

HVAC evaluation, 1990

NCM building layout, undated

Stressteel post-tensioning publication, after 1966

Box 29

Facility reservations and related forms, 1994-1998 (4 folders)

Department of Housing and Urban Development: "Honor Awards for Design Excellence", 1966

Box OV1

Clippings, 1966

Box OV10

Floor plans and blue prints, 1963-1964

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]


Materials include a history of the department, which was established by Dr. A.T. Moore in 1916 and disbanded after 2002, as well as print material produced for health campaigns, and biographical information on directors Dr. Charles D. Watts and Dr. John T. Daniel. Arranged in alphabetical order by folder title. Other archival records and memorabilia on medical topics and health campaigns can be found in the Printed Material, Publicity, and Memorabilia Series.

Box 29

Curriculum Vitae, Dr. Watts and miscellaneous Medical Department material, 1955, 1978, 1984-1986

Daniel, John T., M.D., Senior Vice President position description, 1987
"Employee Wellness Program," 2002
"Medical Bulletin: Tuberculosis," 1922 Feb. 3, from Director Dr. Donnell, two pages
"Raising Healthy Children," Dr. Alvin Poussaint, 1990, talk, includes photo of his visit to Durham
"Swat That Fly," circa 1920s, health campaign circular from Director, illustrated (ink)

Box OV8

Sign, undated

Office of the President Subseries, 1903-2002 and undated, bulk from 1950s-1990s
[RESTRICTED]

This subseries consists of material from the offices and files of five of NCM's nine presidents: William J. Kennedy, Jr., Asa T. Spaulding, Sr., Joseph W. Goodloe, William J. Kennedy, III, and Bert Collins. The contents relate mainly to the periods during which these presidents held the office, though in some cases there is material from previous positions they held within NCM and apart from the company. Much of the material includes files relating to the execution of company business, correspondence, and personnel matters. The majority of the material in the subseries originates from the offices of Kennedy, III and Collins.

[Files in the Office of the President Subseries are restricted for 25 years from the last year of each presidency. Permission to access these records must be granted by NC Mutual in writing prior to use. Otherwise, contents are open to research. Personnel files found in this series have been separated and are closed for 75 years from the date of creation of material, or 2074.]

William J. Kennedy, Jr. (5 boxes)

Served as President of NC Mutual from 1952-1958. Much of the contents of this subseries comprises the materials that Kennedy, Jr. used to document the history of North Carolina Mutual, as well as the wide variety of historical sketches he produced. Other material in this subseries relates to general company business from his tenure at NCM both as the Corporate Secretary and as President, including a letter of support for Pauli Murray's admission to the New York State Bar Association in 1948. Additionally, there is material relating to his tenure as the President of the Bankers Fire and Casualty Insurance Company.

[Some of the material found in box 33 is fragile and should be handled with care. Contact reference archivist before using, as material may need photocopying before use.]

Bankers Fire and Casualty Insurance Company

Box 30

Bankers Fire and Casualty:

1929, 1962-1968, and undated (2 folders)
By-laws, WJK resignation, and miscellaneous documents, 1960-1968
Christmas message, 1963-1967
Executive Committee, 1963-1968
[Photo removed to Photographs series.]
Expansion program, 1956-1962
Minutes, Executive Committee, and Board, 1964-1968
Statements of Condition, 1960-1968

Box 32

Bankers Fire and Casualty:
  1965-1968 and undated
  1921, 1926, 1963-1968
Personnel File, 1965-1967

NCM Company Business

Box 30

Century Life Insurance Company, 1927 and undated
Golden Anniversary program, 1949
Letter of recommendation for Pauli Murray to the N.Y. Bar from W. J. Kennedy, Jr., 1948
Letter regarding unemployment from Alabama Department of Industrial Relations, 1946 June 1
"Liberia Today," 1956
Minutes from meetings of the Actuarial staff, 1957-1959
Miscellaneous documents, 1965 and undated
Mortgage loans, 1944, 1950-1956, and undated

Box 31

National Association of Insurance Commissioners, 1949-1953
NCM Real Estate, 1931-1953
NIA Convention, 1966
North Carolina state insurance laws, 1949-1950
Other insurers’ policies, 1957 and undated
Requests for deferment to the Selective Service Draft Board, 1942-1944
Speeches, 1950, 1953-1965

Box 32
Afro-American insurance companies, 1927-1930 and undated
Annual reports of banking institutions owned and operated by Negroes, 1944-1960
Board of Directors meetings binder, 1925, 1950-1964
Correspondence between Abner Lee and "Lee," 1965 Apr. and undated
_Durham Herald_ clipping regarding 15th annual National Negro Insurance Association (NIA) convention, 1935 May 22
Financial statements, banks, and savings and loan associations, Durham, 1955
Forms committee, 1946, 1949-1953, and undated
Mortgage loans, 1952, 1957-1959, and undated
Miscellaneous historical papers, 1942, 1947, circa 1959
Officers' salaries from various insurance companies, 1955-1956
Population statistics, 1943-1965 and undated
"Records of insurance companies owned by Negroes", 1943-1958
Sales drives - Agents' conferences, 1919, 1923, and undated

NCM History Project

Box 31
"A Brief Outline History of the Organization, Growth, and Development of the North Carolina Mutual Life Insurance Company, 1898-1931" by Asa T. Spaulding
Biographical sketches of E.R. Merrick and Aaron McDuffie Moore, circa 1967 and undated
Correspondence with N.J. Board of Education, 1954, 1963
Dr. J.H. Taylor, consultant - history and correspondence, 1960-1967
History of J.M. Avery and other NCM history and business info, 1914, 1931, 1942-1945, and undated

Box 32
Inventory of the North Carolina Mutual Life Insurance Company
Archives, 1850-2008 and undated, bulk 1898-2008


Box 33

"The North Carolina Mutual Story - A Symbol of Progress: 1899-1966" (the founding of NC Mutual), handwritten manuscript, 1966 (9 folders)
[Some of the material found in box 33 is fragile and should be handled with care. Contact reference archivist before using, as material may need photocopying before use.]

Box 34

History of NC Mutual:

Biography of founders and other material for writing NCM history, 1959

Miscellaneous reproduced photos and other material, 1904, 1943-1959, and undated (2 folders)

John Merrick biographical notes, 1932-1943 and undated


Miscellaneous photos and loose materials, 1912, circa 1950, and undated

Miss S.E. Bailey, consultant - NC Mutual history, 1960

Mr. W.J. Kennedy, Jr. to Mr. John A. Spaulding, 1960-1963, 1966

Mrs. G.P. Lipscomb - NC Mutual history project, 1966

NCM history and historical sketches, circa 1934, 1944, 1959, and undated

NCM History Committee:

1962-1970

Illustration labels, 1969 and undated

Memos to directors, 1959-1969

"History of other Life Companies" correspondence file, 1959-1967

University Press - UNC-Chapel Hill - Mr. W.J. Kennedy, Jr., 1963-1965

Asa T. Spaulding

Spaulding served as President of NCM from 1959-1967. Mainly includes speeches and press releases, as well as some material relating to company business. Much more information can be found in the Asa T. and Elna Spaulding Papers held in the Duke University Special Collections Library.

Box 32

Newspaper clippings, circa 1959
Press release, circa 1957

Box 35

7th annual G.W. Cox Sales for NCM 60th anniversary, 1959
50th and 60th anniversaries, 1949, 1959-1960
60th anniversary and miscellaneous newspapers, 1954-1961 and undated
"A Christmas Wish" by A.T. Spaulding, undated
"A Message" by A.T. Spaulding, 1934
Correspondence and miscellaneous, 1963 and undated
"Histories of Negro Insurance," 1943 and undated
Membership certificate from National Defense Executive Reserve, 1959 July 1
NCM publications, 1947, 1966
N.L. Gregg retirement, 1966
Northern Frontier Planning Committee - "Appreciation Production to President Asa T. Spaulding", 1959
"Partners in Business" by A.T. Spaulding, 1940
Pay stabilization, 1951 and undated
Progress report, 1963
"Report to the Policyholders," 1961-1968 (3 folders)
"Special Reports on Major Business Problems" from Business Week, 1965
The Presidents' Council of the American Institute of Management, 1965
Youth opportunity campaign, 1965

Joseph W. Goodloe

Goodloe served as President from 1968-1972. Contains some material from his time as Corporate Secretary. There are very few materials present within the collection from Goodloe's tenure at NCM.

Box 32

Philadelphia office 30th anniversary, 1968
Dedication Committee for new home office - Mutual Plaza, 1965-1966 (2 folders)
Inventory of the North Carolina Mutual Life Insurance Company
Archives, 1850-2008 and undated, bulk 1898-2008

Box 35

Letter concerning employment contracts for former Unity Mutual Life Insurance Company officials, 1971

Report to policyholders, 1971-1972 (2 folders)

**William J. Kennedy, III (7 boxes)**

Kennedy, III, son of William Kennedy Jr., served as President of NC Mutual from 1972-1990. Material relates to general company business, external and internal correspondence, mergers with and reinsurance of other insurance companies, and information pertaining to other organizations with which NC Mutual was affiliated (the contents are categorized as: company business/personnel, correspondence, other insurance companies, and other organizations).

[Some personnel records were removed to Personnel Subseries and are closed for 75 years from date of creation of most recent record or 2074.]

**Company Business/Personnel**

Contains material relating to both financial and non-financial aspects of the company business, including but not limited to matters relating to personnel. Material is organized alphabetically by the size of the material. There is also one personal letter from his parents, 1958.

Box 36

"Accountants' Opinion" report, 1981 Dec. 31
Asa T. Spaulding Insurance Hall of Fame, 1984-1985
Banquet tributes, 1978 and undated
Blank retirement "Certificate of Service," undated
Board of Directors fees and committees of the Board, 1985 Mar.
Board items, 1973-1984, 1989 and undated
Construction offers, 1988
Cost Committee: Life Office Management Association, 1954-1963 (3 folders)

*Harvard Business Review*, 1973


"Historical Experience of the Reinsured Group Business," 1976
"Historical Sketch" by W.J. Kennedy, Jr., three versions circa 1934, 1949, 1957
"Introduction to Life/70, Student Guide," circa 1978 (2 folders)
Box 37

"Introduction to Life/70, Textbook", circa 1978

Martin Luther King Jr. memorial program, 1985

Merrick-Moore scholarship advertising, press releases, clippings, 1935-1936

[The contents of this folder are fragile and in need of preservation. Please contact a reference archivist to use this material, as material should be photocopied before handling.]

Md. Insurance Division hearing in petition for approval of contract and reinsurance of Mutual Benefit Society of Baltimore, 1977

Miscellaneous company business, circa 1970s

New South Life Insurance Company financial statements and information, 1973-1975

North American Insurance Company contracts, 1980

NCM book review

NCM building, Vierendeel trusses, 1977-1980

NCM employee evaluation plan, 1961-1962

NCM Employment handbook, guidelines, and company information, undated

NCM Group Reinsurance Program report, 1982 July 28

NCM long range planning manual - 1st draft, 1973

NCM "Moving to...Mutual Plaza", 1965

Photos - WJK III, Heritage room, undated


Time capsule placement ceremony, 1963 Oct. 20

Box 38

Claim settlement practices in Virginia, 1978

Documents relating to the reinsurance of North American Insurance Company, 1974-1980

Insurance Certificates of Authority, 1977

Miscellaneous company business, 1977 and undated

Notes, 1984-1986

Releases, agreements, and contracts for reinsurance, 1970-1975

Various personal insurance policies and invoices for W.J. Kennedy, III, 1946, 1953-1965 (3 folders)

Personal letter to Kennedy from mother and father, William Kennedy Jr., on vacation trip to New Mexico, 1958 Sept. 24
Various NCM committee agendas and plans, 1988-1989

**Correspondence**

Materials include chronologically-ordered internal and external correspondence with the Office of the President under William J. Kennedy, III. Also includes various NCM memoranda.

**Box 39**


*Essence* magazine correspondence for possible investment, 1973

Goodloe policy inquiry and correspondence, 1947-1948, 1988

Insurance Holding Company Act, Linville Roach, 1987-1989 (2 folders)

National Employers Security Trust, 1976

Virginia Mutual, 1975

**Other Insurance Companies**

Contains material relating to annual/financial statements, contracts, and correspondence with other insurance companies that were associated with NC Mutual in terms of mergers and reinsurance.

**Box 38**

"Annual Statement of the Southern Life Insurance Company," 1983

All American Assurance Company annual statements and minutes, 1974-1976 (2 folders)

American Citizens Life Insurance Corporation information and annual statement, 1978-1979 (2 folders)

**Box 40**

Bradford's Industrial Insurance Co. annual statement and examination, 1977-1981

Chicago Metropolitan Mutual Assurance Company:

Annual statements, examinations, business records, 1965-1975, 1978 (4 folders)

Merger agreement, circa 1973-1974 (2 folders)

Policy samples, undated

Mammoth Insurance Company merger, 1985

Mutual Benefit Society of Baltimore City contract information, merger, and historical sketch, 1977-1978 (2 folders)

NC Mutual budget statements and merger information, 1978 (2 folders)
New South Life Insurance Company records, 1978
North Carolina Insurance Code and purchasing/selling of other insurance companies, 1978
Other insurance companies annual statements, 1975-1986

Box 41
Provident Home Industrial Insurance Company merger and miscellaneous info, 1974-1975, 1981 (2 folders)
Southern Aid Life Insurance annual statement, 1986
Southern Life Insurance Company, 1977
Union Protective Life Insurance Company business records, 1973-1975
United Mutual Insurance Company of NY annual statement and information, 1985-1987 (3 folders)
Universal Life Insurance Company of Memphis annual statement, 1979
Various merged companies' financial information, 1975-1977
Virginia Mutual Benefit Life Insurance Company:
   Annual statement, 1984
   Acquisition, 1985-1988 (2 folders)
   Miscellaneous files, 1988

Other Organizations
Includes material relating to business meetings, memoranda, and other miscellaneous information concerning organizations outside of North Carolina Mutual with which William J. Kennedy, III and NCM were affiliated. Material is organized alphabetically.

Box 42
American Citizens Life Insurance portfolio summary, 1979
Chicago Metropolitan:
   Employee information, 1969, 1972
   Labor union agreement, 1970
   Merger information, contracts, 1974
   Significant financials, reports, 1973
Coinsurance agreement between American Capital Life Insurance Co. and Citizens Security
Inventory of the North Carolina Mutual Life Insurance Company
Archives, 1850-2008 and undated, bulk 1898-2008

Life Insurance Co., 1980
NC Association of Life Insurance Companies, 1985-1990 and undated (5 folders)
Opportunities Industrialization Centers, 1986-1989 (2 folders)
Virginia Mutual Life Insurance Co., 1988
Winston Mutual Life Insurance Co. merger information and finances, 1974, 1977, 1984

Bert Collins (23 boxes)
Collins served as the President of NC Mutual from 1990-2003. Prior to his role as president, Collins served as an Executive Vice President for the company. Includes documents dating from when he first joined the company in the 1970s through until near the end of his tenure as president, with the majority of the material dating from 1985-1994. The contents are organized into four categories: budget/finance, company business/personnel, correspondence, and other organizations. Some personnel records were removed to Personnel Subseries.

Budget/Finance
Contains material relating to financial aspects of NCM company business. Examples include company audits, budgets, financial reports, bills for service and pension account reports. Organized alphabetically by folder title.

Box 43
Business plans and budgets, Insurance OPS, 1990
Check requisitions, bills for service, receipts ledger entries, 1990-1994 (4 folders)
Claims, 1988-1990
Comparative Statement of Budget and Actual Income and Disbursements for 1991 Sept. 30
Corporate business plan, 1988 Nov. 16
Employee Pension Account reports, 1987
Internal audit, budget, reports, clearing checks, general finance, 1986-1992 (5 folders)

Box 44
Internal audit, budget, reports, clearing checks, 1992-1994 (2 folders)
Mechanic and Farmer's Bank statement, 1971-1972
Ostine Swan - Review Audit Plan, 1995
PW Trust Company, 1994

Box 66
Group Reinsurance Contingency Reserves, 1990
Premium income by week, 1990
Securities Committee minutes, 1987-1990

Company business/Personnel

Contains material relating to non-financial aspects of the company business, including but not limited to matters relating to personnel. Documents are organized alphabetically. Non-NCM printed material is located in the "N" section and includes material such as various business articles, the Durham Rotary Bulletin, and photocopies of newspaper clippings. Similar material can be found in the Printed Material Series.

[Confidential material has been removed to Personnel Subseries and is closed for 75 years from date of creation of most recent record or 2074.]

Box 45

20th anniversary of Mutual Plaza, 1968-1988
Ad hoc committee to study use of Home Office facilities, 1976
A.J. Rivers retirement, 1990
Bachrach Studio - Presidential photo, 1991
Claims, 1988-1990
Collins promotion congrats and clippings, 1987
Collins speeches and remarks, 1991
Compensation Task Force, 1987
Complaints, 1988-1992
[Removed to Personnel Subseries.]

Conflict of Interest forms, 1994
Control Environment questionnaire, undated
Copies of memos to Board of Directors, 1980-1983
Data Processing Task Force, 1989 May-July
"Directions and Goals: Field Operations," 1984
Disaster Plans - letters, 1973
District mergers, 1988
Dr. Charles Watts, 1987
Duties of the System Coordinator, undated
Electronic Data Systems, 1989-1990
Employee and Management evaluation, analysis, and improvement, 1985 (9 of 13 folders)

**Box 46**

Employee and Management evaluation, analysis, and improvement, 1985 (4 of 13 folders)
Employee personal computers, 1985-1987, undated
Employee Performance Reports material, undated
Environmental Task Force, 1989 May-July
Field Committee, 1986-1987 (2 folders)
Field Accounting System, 1982-1990 (5 folders)
Founders' Day, 1987
Furniture and fixtures, 1984-1989, undated
Goodloe policy, Parrish policy, 1990
Hay Management Consultants report and recommendations for Incentive Program, 1985 Nov.

**Box 47**

Historical documents, 1989
Home Office appointments, 1990-1993
[Removed to Personnel Subseries.]

John Tyler Caldwell Award for Humanities Program (Honoree: John Hope Franklin), 1991
Management Development program, 1985-1986
Memorex maintenance agreement, 1985
Merger of Mutual Community Savings Bank with Greensboro National Bank, 1994
Miscellaneous company business, 1989-1994 (5 folders)
NCM Life Communications sale of Williamsburg, Va. radio stations, 1985
NC Mutual Re-engineering project, 1994
Non-NCM printed material: "Performance Appraisals that Measure Up", 1985
Non-NCM printed material: UN Bio: "Joseph Nanven Garba (Nigeria)", circa 1989
Non-NCM printed material, 1989-1994 (5 folders)

**Box 48**
Office maps, 1986 and undated
Orphan photo, undated
Personnel:
[All of these files have been removed to the Personnel Subseries and are closed for 75 years from date of creation of most recent record or 2074.]

Pension Fund Manager, 1990
Pension Investment, 1986-1988
Pensions and Retirement, 1986
Pension Retirement Plan Committee - appointments and resignations, 1991
12th floor personnel, 1988
Absenteism and Tardiness policy, 1986
Changes in assignment and promotion, 1979-1989 and undated
Craig Page - RDU Airport, 1990
Letters of recommendation, 1974-1990 and undated
Personnel matters, 1988-1994 (5 folders)
Org charts and personnel listings, 1990 and undated
Salary policy and examination, 1986
Sexual Harassment policy, undated
Suggestion plan, 1985-1990 and undated
Planning, 1989
Policy approval material, 1983-1989 and undated
Press release, 1988
Program to conserve NAIC business, 1980
Revoked CPA license, 1983

Box 49

Profitability Task Force:
NC Mutual annual statement, 1982
Minutes and agenda, 1983-1984 (2 folders)
Studies:
  Agency, 1983-1984 (2 folders)
  Controller and misc, 1983
  Correspondence, 1983
  Direct group, 1983
  Executive Committee recommendations, 1983
  Financial data, 1983
  Hospitalization - Employee benefits, 1983
  Reinsurance and EDP, 1983

**Box 50**

Speeches:
  Boy Scout Troop 55, 1992
  District offices, 1975, 1980-1990, and undated (2 folders)
  Dr. Donna Benson, Vita - Introduction, 1992
  Durham Business and Professional Chain banquet - Tony Brown, 1992
  Speech file, 1990-1991 and undated
  Goldsboro district home office visit, 1992 June 25
  Good Idea speech material, undated
  Greetings, 1991
  Impact of violence on the business community, undated
  Health Care, 1992 Nov. 18
  Life/70 training, 1992 June 19
  Mel Watt introduction, 1993 Aug. 1
  Miscellaneous speech material, 1991-1998 and undated
  Receptions, 1990-1991

**Box 51**

Sayre and Sayre, 1989
Southwood Landscaping contract, 1982
Suggestion Committee, Good Idea campaign, 1991
Survey results, 1988
Survey of mutual life insurance companies, 1986
Team Leader Task Force, 1988 (14 folders)
Telecommunications, 1983-1986
Today's mail, 1993 Feb. 9

**Box 66**

Board meeting, 1985 (3 folders)
Employee Agreements, 1974-1988 and undated
Employee Group Health Plan, 1984-1988
Equipment lease file, et al., 1985-1986
Miscellaneous documents, 1990 and undated
Collins, Bar exam, 1970
Rolling Hill - Offer to purchase and contract, 1990
*Whetstone* Editorial Board, 1988

**Correspondence**

Materials include chronologically-ordered internal and external correspondence with the Office of the President and the Office of the Executive Vice President under Bert Collins. Also includes North Carolina Mutual committees' meeting minutes and information, and NCM memoranda.

**Box 52**

Correspondence-External:

Collins promotion congratulations, thank you's and announcement addresses, 1990
1991-1994 (5 folders)

**Box 53**

General solicitation, 1989-1994 (10 folders)

**Box 54**

Internal memoranda and meetings:

1984-1988
NCM Board of Directors meeting, 1989 May 24 (2 folders)
NCM Board of Directors meeting, 1989 July 26 (2 folders)
1989-1994 (4 folders)

Box 55

Correspondence-Internal:
  1989-1991 and undated (2 folders)
  1992-1994

Other correspondence:
  Attorney Charles McClain, 1994
  *Black Directory* information and business plan, 1990-1992
  Correspondence with *Black Enterprise*, 1993 Mar.-Apr.
  Charles Ray - proposal, 1994
  CC Spaulding papers - Duke Library, 1999-2000
  Department of Insurance - various states, 1990-1994
  *Dollars and Sense* 1993 Jan. issue, solicitation and correspondence
  Draft letter to A.M. Best Co. from Bert Collins, 2002
  EEOC Notice of Charge of Discrimination, 1989
  [Removed to Personnel Subseries.]

  Government departments and agencies, 1989-1994
  Motivational sales letters, 1993
  Shaw University campaign, 1992
  The Continuum Co. correspondence, 1982-1989
  Tillinghast correspondence, 1989-1990

Box 66

Correspondence and memoranda, 1990-1991

Other Organizations

Includes material relating to business meetings, memoranda, retreats, and other miscellaneous information concerning organizations outside of NCM with which Bert Collins and NCM were affiliated. Connections to these organizations range from giving philanthropically to holding a seat on a Board of Executives. Material is organized alphabetically.

Box 56
Air Atlanta, 1986-1987
American Citizens Life Corporation - Board of Directors meeting, annual stockholders meeting announcement, 1991 Apr.
American Council of Life Insurance: Life Insurance Company Quality Efforts survey, completed by Charkes Blackmon, 1992
American Council of Life Insurance: Proposed regulation, 1990 (7 folders)
Boys and Girls Club, 1987-1991 (2 of 4 folders)

Box 57

Boys and Girls Club:
1987-1991 (2 of 4 folders)
National Council Annual meeting, 1991
Regional meeting, 1994 Apr. 19
CLG, Inc., 1985-1987
Deloitte and Touche, 1984-1990 (2 folders)
Duke Hypertension Center - Community Advisory Board, 1994 June 25
Duke University Fuqua School of Business, 1987-1989 (2 folders)
Ernst and Young (Ernst and Whinney), 1983-1990 (2 folders)
External meetings, symposiums, and retreats, 1990-1992 (2 folders)
External memos, reports, and general info, 1989-1990

Box 58

External memos, reports, and general info, 1990-1994 (10 folders)

Box 59

External memos, reports, and general info, 1994 (4 folders)
Greater Triangle Community Foundation:
1991 (2 folders)
Board of Directors, 1991
Finance Committee meeting, 1991 Nov. 7 (2 folders)
Greater Triangle Community Foundation Finance Committee minutes, 1991

Box 60

Guardsmen, 1994
Insurance Achievement - John Allen, 1987-1989 (2 folders)
[Five audiocassettes removed to Recordings Series.]

J. Brown, Pro Care Insurance Services, Inc., 1994
Leadership Training Institute and Civil Rights Reunion, 1990 Aug. 15-19
Legislative and Salary Study Commission report, 1990
LIC Board Meeting - Chicago, 1994 Sept. 24-25
Major Campaign Review Board, 1991
NC Business Council, 1991
NC Center for Nonprofits, 1994
North Carolina Airports Association annual meetings, 1991
Raison D'Etre Club, 1970-1972
Raleigh Durham Airport, 1990
Total Quality Education, 1994
UDI/CDC Board meeting, 1994 Sept. 28
United Way of Greater Durham Loaned Executive Training, 1992 Aug. 17
Wachovia Board meeting, 1994 Apr. 15


Box 61

NCM Capital:

   Acquisition, 1991 (5 folders)
   Attorney's fees, 1991
   Information regarding purchase, 1991
   Items due from lease, 1991
   Management Group business records and information, 1988-1991 (3 folders)
   By-laws, 1991
   Compensation data, 1991
   1991
Corporate meetings, 1990
Information, 1990-1991 (2 folders)

Box 62

NCM Capital:
Information packets, circa 1988
Executive Committee meeting, 1991
NCM Board resolutions, 1991
Note purchases, 1991
Quarterly report, 1990
Stock and notes, audit info request, 1986-1991
United Asset Management annual report, 1990

Box 63

North Carolina Central University:
Academic Affairs annual report, 1990-1991
Board of Trustees, 1988-1994 (7 folders)
Board of Trustees agendas and meetings, 1990
Board of Trustees info, 1989-1990
Board of Trustees information for Collins, 1990 (2 of 3 folders)

Box 64

North Carolina Central University:
Board of Trustees information for Collins, 1990 (1 of 3 folders)
Budget info and case study for the Board of Trustees, 1990
DeJarmon, 1992 Apr.
Miscellaneous, 1987-1991 (2 folders)
NCCU Foundation, 1983 (5 folders)
NCCU Foundation report, 1991 Apr. 12
Open House, 1992

Box 65

North Carolina Central University:
Records from UNC Board of Governors, 1989-1991 (2 folders)
Records from "The University of North Carolina - the 1989 Conference on Trusteeship"
Printed Material - "Feasibility Study", 1984
Printed Material - "NCCU Catalog, 1988-1990"
School of Law - Board of Visitors, 1975-1990 (2 folders)
Search Committee, 1991
UNC Board of Governors, 1993
UNC-CH campus visitation, 1994 Oct. 14

Box 66
Mutual Savings and Loan, 1988-1992 and undated

Office of the President Oversize Material

Box OV1
Annual statement and clippings, 1965, 1988

Box OV2
New York Life Insurance Company annual statement, 1959
Clippings, 1959
Clippings, 1987-1989
Clippings, 1994 (2 folders)

Box OV4
Retiree information, floor plan markups, 1970, circa 1990
[Some of the materials in this box are fragile and in need of preservation. Please contact a
reference archivist to use this material, as contents should be photocopied before being
handled.]

Box OV8
Fifty leading industrial life companies, 1952
Financial statement, casualty statements and reports, 1931, 1961-1965
Employer year end reports, 1971-1972
Asa T. Spaulding clipping, 1990
Floor plans, 1986
FAS master schedule, circa 1992
The Independent, 1999 Feb. 10-16

Newspaper clippings, 1990-1991
[Removed from "Speeches: District offices, 1990" folder.]

Box OV10

Carpet layout, 1987
[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

Box OV38

Merrick-Moore Scholarship clippings, 1935-1936
1982 net incomes by state and "Analysis of operations by lines of business," 1982
[Removed from "Profitability Studies".]

Personnel Files Subseries, 1950s-1990s

Files on employees of NC Mutual originally located in the Office of the President Subseries, chiefly created from the 1950s through the 1990s.

[The Personnel files Subseries is CLOSED to access for 75 years from date of creation of most recent record, or 2074.]

Box 67-68

Personnel Files

Public Relations Subseries, 1911-2008 and undated (9 boxes)

Material in files chiefly documents activities such as advertising, publications and printing, and community relations projects undertaken by North Carolina Mutual. The Photographic Material Series also houses an extensive collections of images used by the Public Relations Department in publications such as The Whetstone.

Advertising and Promotions Subseries, 1911-1998 and undated

The bulk of the material dates from the 1980s and consists of bids, invoices, contracts, and correspondence regarding advertising in specific periodicals, radio stations, and television stations. Also included are memos, drafts, sketches, and research regarding advertising strategy, specific advertisements, and promotional events. This subseries also contains clippings, sample ads, and promotional materials, such as calendars and pamphlets, and photographic plates of group shots and advertisements. Other promotional items are housed and described in the
Memorabilia and Artifacts Series.

Box 69, 70, 75

Advertising and Promotions files (47 folders)
[Some items removed to Oversize Material.]

Community Relations Subseries, 1932-2008 and undated

Documents NCM's various programs and activities related to community outreach through scholarship support, mentoring programs for youth, and community health programs such as anti-smoking campaigns. Materials consist of event programs, pamphlets, clippings, speeches, photographs, certificates, and leaflets. A substantial portion of the materials are related to the Merrick-Moore Scholarship in the 1930s, including lists of colleges and students, bills, receipts, and correspondence from awardees. Also of note are materials related to the Avery Boys' Club, including a binder belonging to W.J. Kennedy, Jr. Other programs and events are related to the United Negro College Fund, NCCU, the Boy Scouts, Greater Durham Arts Fund, the 1943 launch of the S.S. Merrick, and Founders' Day celebrations.

Box 70, 71, 75, 76

Community Relations files (41 folders)
[Some items removed to Oversize Material.]

Financial Statements Subseries, 1985-1986

Contains financial reports, budget statements, and advertising expenditures.

Box 71

Financial statements files (5 folders)

Heritage Room Subseries, 1975-1983 and undated (3 folders)

Contains correspondence, clippings, layout plans, and photographs related to the creation of NCM's Heritage Room, a large exhibit on company history.

Box 71, 76

Heritage Room files (1 folder)

Historical Files Subseries, 1927-2008

The bulk of the material is related to specific events, such as annual meetings, the ground-breaking ceremony in 1963, and the celebration of NCM's 85th anniversary, centennial, and various Founders' Days. Materials consist of slides, photographs, clippings, correspondence, programs, print materials, memos, and other planning documents. Also included are historic NCM policies and certificates.

Box 71, 76, 77
Historical files (14 folders)

[Some items removed to Oversize Material. CD-Rom removed to Digital Materials. Electronic files have been migrated to a library server. To request access, please contact a reference archivist before coming to use this collection.]

Other Correspondence Subseries, 1973-1996

Files of mixed correspondence concerning the Public Relations Department. The bulk of the files date from 1984-1986. Materials also include solicitations, brochures, and subscription forms. Topics include radio and television stations, interview requests, A.T. Spaulding, Ben Ruffin, and W.J. Kennedy, Jr.

Box 72

Correspondence files (27 folders)

Other Files Subseries, 1984-1986 and undated (21 folders)

Additional materials created by the Public Relations Department that don't fit in above categories. Topics include office contests, employee benefits, taxation, the new products committee, the lyrics to the company song, and the history of African Methodism. Materials include phone messages, personnel forms, notes, agenda, minutes, memoranda, brochures, correspondence, an architecture showcase book, a drawing of a house, and a memoir about life insurance.

Box 72, 73

Other Public Relations files (22 folders)

Personnel Subseries, 1933-2004

Files open to research access contain company publicity regarding personnel, including, but not limited to, obituaries, biographies, a list of employee birthdays, and other announcements. Among those profiled are Asa T. Spaulding, C.C. Spaulding, Jr., William Henry Harvey, W.E. Williams, W.E. Coleman, W.D. Hill, J.L. Wheeler, W. Lionel Cook, and Fred R. Moore. Several folders related to the retirement and death of William Kennedy, Jr. contain extensive photographs alongside paper materials. Folders profiling women associated with NCM contain copies of The Whetstone and photographs from the 2000s.

Box 73, 77

Personnel files (15 folders)

[Some items removed to Oversize Material. CD-Rom removed to Digital Materials. Confidential personnel files have been removed to Personnel Subseries in Office of the President Series, and are closed until 2074. Electronic files have been migrated to a library server. To request access, please contact a reference archivist before coming to use this collection.]

Press Coverage and Press Releases Subseries, 1938-2004
Contains press releases put out by the Public Relations Department and clippings, photocopies, and reprints of articles about NCM and its staff, including entire issues of several mass market magazines.

**Box 73, 74, 77**
(23 folders)
[Some items removed to Oversize Material.]

**Production and Publications Subseries, 1931-1986**
Contains copies of *The Review*, pages from *The Whetstone* , ad layouts, proofs, correspondence, notes, memos, and other files relating to Public Relations publishing and printing workflows.

**Box 74, 77**
Production and publications files (14 folders)

**Speeches Subseries, 1953-1973**
Contains copies of speeches, press releases, and interviews with Presidents William J. Kennedy, Jr., J.L. Goodloe, and Asa T. Spaulding. Also includes speeches by various public figures at the home office dedication in 1966.

**Box 74**
Speeches files (10 folders)

**Public Relations Oversize Material**

**Box OV1**
Calendar, circa 1940
Calendar art, "A Penny Short", NC Mutual presidents, painting of building, undated

**Box OV4**
Advertisements, undated
[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

**Box OV9**
Advertising sketch by Nash, undated

**Box OV10**
Calendars, 1968-2008 (2 folders)
Box OV11
Calendars, 1930-1939, 1968-1976
Posters, calendars, art, 1946-1999

Box OV12
Advertisements in newspapers and for agents, 1962-1977
Asa T. Spaulding clippings, 1956-1972
Budgets, 1984-1986
Clippings, 1950-1991 (3 folders)
Programs, advertisements, clippings, 1927-1982
Ad ideas and planning, 1972-1982 and undated

Box OV13
Advertisements and proofs, 1962-1968 (2 folders)
Durham Arts Council classes, 1986
NCCU presidential inauguration, 1968
Brown and Bigelow calendar enclosure, 1960
NIA 50th anniversary, 1970
Newspapers and clippings, 1983-1986 (4 folders)
The Whetstone layout, 1993

Box OV14
Reproduced proofs with memos, undated (2 folders)

Box OV38

Box OV45
"Board of Directors, Past and Present," 1946
Calendar art, "A Penny Short" painting reproduction, copyright 1936
Calendars, 1927-1928, 1936-1938

Box OV49
Inventory of the North Carolina Mutual Life Insurance Company
Archives, 1850-2008 and undated, bulk 1898-2008

Magazine advertisements (bound), 1975-1978

Folder 1-3

Very large posters and advertisements, 1968-2006 (14 items)

Corporate History Files, 1900-2005

(2 boxes)

Assembled by staff of NC Mutual and a former company archivist, these files contain a sampling of the most significant historical documents illustrating the formation of the company, its founders, and its first decade of existence. Materials are varied and include charters and by-laws; early policies, publications and advertisements; significant correspondence; programs, annual statements, and Christmas greetings; items marking milestones in company history; and other unique items. There is also a folder with two charts for 1933 and 1941 ranking the current African American owned life insurance companies, including NCM. Other historical and early items can also be found throughout the collection, especially in the Agency, Memorabilia, Photographic Material, and Print Material Series, and the Office of the President Subseries; early examples of policies from 1902 into the 1930s are found in the Agency Series. Arranged in rough chronological order.

Box 78

Bylaws and amendments, 1900-1946
Annual statement, 1908
The Mutual Album, 1910
Home office postcard, circa 1910
Agents' conference, 1920 June
Publications and pamphlets, 1920-1923
Female employees, 1923-1995
Greetings, statements, and advertisements, 1924-1927
C.C. Spaulding speeches and other materials, 1926-1935
Publications, pamphlets, and advertisements, 1927-1929
Biographical sketches of officers and directors, 1927-1969
[Some items removed to Oversize Material.]
Manuscript and quotations, 1928 and undated
Liberia banknote, 1929 Jan. 31
Publications, correspondence, advertisements, and statements, 1930-1938
Records of life insurance enterprises operated by Negroes, 1933, 1941 (2 charts with data such as assets, founding date)
Inventory of the North Carolina Mutual Life Insurance Company
Archives, 1850-2008 and undated, bulk 1898-2008

*The Negro's Adventure in the Field of Life Insurance*, by W.J. Kennedy, Jr., 1934
"Historical Sketch", by W.J. Kennedy Jr., 1934
Thrift Club manual, 1938
Charter and amendments, 1938-1946

**Box 79**
Chronology, 1938
"The President's Book", 1939
Correspondence, statements, and programs, 1940-1949
*A Tour of the Home Office*, 1945-1955
Whaley's Pharmacy grand opening, 1951 Oct. 11
Historical summary of provisions governing payment analysis, 1952
Publications and memos on NCM history, 1952-2005
Proofs from publication on NCM history, undated
Speeches, publications, and programs, 1953-1966
Bylaws of NCM and other companies, 1957
Draft of NCM bylaws, 1958 and undated
Bylaws and charter committee, 1963-1971
Presidents' Biographical Sketches, circa 1990

**Box OV8**
1909 annual statement, photocopied in 1964 with note from 1983

**Digital Media Series, 2000s**
(3 boxes)
Contains diskettes of files and DVDs with photographic images and duplicated historical films, chiefly regarding NC Mutual's history. Titles taken from original media carriers.

**Box DIG 1**
Diskettes (approx. 30)

**Box DIG 2**
DVDs
10 DVDs with files of images and documents, and a documentary about "Black Wall Street" in Durham NC
Box DIG 3

6 DVDs containing copies of films:

- Dedication, 1966
- Three color shorts, 1966
- Dedication, TV, 1966
- Groundbreaking, circa 1963
- 75th Anniversary, 1975
- DC footage, about 1970

Exhibit Material Series, 1940s, 1960s-2000s, and undated, bulk 1970s-2000s

(25 boxes)

Houses the components of many exhibits assembled and curated by North Carolina Mutual staff. Mostly consists of black and white or sepia images and captions mounted on thin board, often with velcro backing, which originally formed a large installation in "Heritage Hall" gallery, commemorating NCM's history. Other exhibits were created for specific events such as conventions. Many of these images were reproduced from vintage photographs from the early years of the company, many of which are in the Photographic Material Series. Others show officers and employees from throughout NCM's history. Includes color and black and white photographs, signs, labels, and informational panels. Also includes two framed letters of interest: one from Eleanor Roosevelt's secretary, writing in July 1934 subsequent to a visit to NCM by Roosevelt in June of that year, and the other a strongly worded letter written by President Spaulding on improving the company's performance, entitled "Open Letter to Managers," from Berlin, Germany, 1931.

Box 80-89

Exhibit panels, framed items, and captions

Box OV1

Clipping, policy holders' meeting photographs, 1974, circa 1995

Box OV14-OV22

Exhibit material

Box OV23

MEAC exhibit, 1993
Stairwell Initiative circa 1995

Box OV24

NC Mutual building, circa 1980

Box OV44

Exhibit material, 1943, circa 1963, and undated
Memorabilia and Artifacts Series, 1923-2008 and undated, bulk 1970s-2000s

(14 boxes)

Contains a wide variety of items that document recognition of achievements, advertising campaigns, and company and employee milestones throughout the history of NCM. Organized into four subseries: Artifacts, Awards and Memorabilia, Plaques, and Promotional Items. Material in the Artifacts Subseries includes event programs, informational publications, employee handbooks, and various other items such as medical supplies and sales logs. The Awards and Memorabilia Subseries houses awards and certificates for NCM employees, as well as awards received by NCM from external organizations. Includes a company award featuring a bronzed shoe belonging to C.C. Spaulding, and two copies of the Merrick-Moore Award. Also includes a 1943 Western Union telegram from then-governor of N.C. Broughton to C.C. Spaulding concerning the launching of the U.S.S. Merrick (box 90). The Plaques Subseries includes both internal and external plaques marking achievements within the company and honoring the company itself for its contributions to the community, commemorating the company's lifetime membership in the NAACP, and other milestones. Material in the Promotional Items Subseries consists of both printed material and artifacts that were created with the purpose of promoting business for NCM. Examples of items from this subseries include holiday cards, pocket calendars, fans, match books series with leaders from the civil rights movement, blank baby books, and bookmarks, among many other items.

Artifacts Subseries, 1963-2008 and undated

Box 90
(9 folders)

Box 91-93
(3 large boxes)

Awards and Memorabilia Subseries, 1953-2003 and undated

Box 90
(6 folders)

Box 94-95
(2 large boxes)

Plaques Subseries, 1959-2008 and undated

Box 96-102
(7 large boxes)

Promotional Items Subseries, circa 1950-2002 and undated

Box 90
Box 103

(1 large box)

Memorabilia and Artifacts Oversize Material

Box OV9
Certificates, 1962-2005
Article About Mutual Plaza Dedication (deframed), 1966

Box OV23
Programs, awards, and certificates, 1923-2004
A.M. Best Certification of Financial Strength Rating, 2006, Feb. 10

Box OV24
Prudential Insurance plaque, 1967

Box OV25
Carrier bag, undated

Box OV26
Advertising Federation award, 1974
Certificate from UNC President commemorating NCM's centennial, 1998
"An Album of the American Family," 1980
Federal Housing Administration Award, 1959, June 1
Durham County Board of County Commissioners resolution commemorating NCM's 95th anniversary, 1993, Oct. 11

Box OV45
Durham resolution honoring NCM 100th anniversary (framed), 1998

Box OV46
Plaques, 1991-1997 and undated

Box OV48
NCM visitor register, 1924-1955

Other Organizations Series, 1927-2008 and undated

(9 boxes)
Contains documents from companies which NCM acquired, and companies with which NCM shared a relationship (or from which it obtained information for planning). These companies include:

[Box 104 contains fragile material and is slated for preservation photocopying. Please contact a reference archivist to use this material.]


Created to administer the Lincoln National Life Museum, the Foundation provided an avenue for charitable, tax-exempt contributions of Lincoln memorabilia to the museum. It appears that the NCM Corporate Planning department requested information from the Lincoln National Life Foundation regarding its annual report and bylaws in 1975.

**Box 104**

Lincoln National Life Foundation documents, 1973-1975

**Mortgage Company of Durham Subseries, 1929-1941**

Founded in 1929 by C.C. Spaulding, E.R. Merrick, and R.L. McDougald to provide greater financial independence for black businesses in Durham, N.C. Although this company stood as a separate corporate entity from NCM, many of the members of the Executive Committee were leaders at NCM, and the company was somewhat connected with NCM in practice. The material consists of the early minutes of the Executive Committee of the Mortgage Company of Durham.

[_fragile and slated for preservation photocopying. Please contact a reference archivist to use this material._]

**Box 104**

Minutes of the Executive Committee of the Mortgage Company of Durham, 1929-1941 (2 folders)


Established in 1921 as the National Negro Insurance Association (later renamed National Insurance Association or NIA), and was created in order to promote and represent the mutual interests of insurance companies that were owned and operated by African Americans. C.C. Spaulding was elected as the first president of the association and NCM has remained one of the largest member companies of the organization to the present. NCM employees have regularly served on the Board of Directors and as officers for the NIA.

**Box 104**

Assorted printed material and miscellaneous documents, 2005-2008

NIA brochure, 2007 and undated

**Box 105**

NIA:

Assorted convention planning material, 2006-2007
NIA annual convention programs, 2002-2004, 2006-2008
44th Institute in Agency Management, 2000
Audit report, 1979-1980
Committees and other NIA files, 1991-1996
Conferences and other pamphlets, 1988, 1998-2002
Excerpts on notable African Americans, "Little Known History of the Negro", undated
NIA corporate policies, plans, job descriptions, 1975 and undated
NIA tax files and IRS correspondence, 1986-1991 (2 folders)
Resumes, 1981-1982 and undated
Surveys, studies, workshops, and other material, 2000-2001
Various NIA pamphlets, newsletters, correspondence, and printed material, 1989-1998 and undated

Box 106
NIA Golden Anniversary scrapbook, 1970

Box OV1
Poster of NIA presidents, circa 1970

Box OV2
66th National Insurance Month posters, 2000 May

NCM Capital Subseries, 1986-1994 and undated
Maceo Sloan of North Carolina Mutual founded NCM Capital in 1986. NCM is a parent company of NCM Capital. Contents include Board records, reports, and general business files.

Box 106
NCM Capital miscellaneous business files, 1987-1988 (3 folders)

Box 107
NCM Capital Board and business files, 1986-1989 and undated (26 folders)

Box 108
NCM Capital reports and correspondence, 1989-1994 and undated (22 folders)

Box 109
NCM Capital correspondence, reports, minutes, and business files, 1986-1990 and undated (18 folders)

Box 109
Foreclosure proceedings and legal research, 1985-1993
Legal documents, 1994

Box 110
Appraisal for home office, 1988
Board of Directors
   Minutes, 1990-1999 (4 folders)
   Notices, 1998
Complaints, 1994-1998
Kaid Almadrahi case, 1990-1992
miscellaneous Insurance Coverage for Wright Mutual, 1999
Omni-Care Health Plan, 1997-1999
Photos of Board of Directors and information booklet, 1987
Lincoln National Pension benefit quote summaries and benefit payouts, 1980-1987
Pension plan, 1987-1999

Box 111
Amended bylaws, 1967, 1990
Articles of Association, 1942
Certificates of Amendment, 1945, 1959, 1966, 1985
Certificate of Authority, 1942-1944
Cynthia Thomas-Riley case, 1994-1997 (3 folders)
Deed for home office, 1961
Foreclosure documents and notes, 1975-1993 (2 folders)
Landlord-tenant decisions, 1991-1994 (2 folders)
Legal complaints against Wright Mutual, 1991-1993
Mortgage foreclosure proceedings, 1991-1993
Papers regarding incorporation and connection with Pilgrims Mutual Aid Society, 1942-1944

**Box 112**

- Board of Directors and Executive Committee minutes, 1954-1973 (9 folders)
- General contents of Board of Directors and Executive Committee minutes binders, copyrighted 1945
- Wright Mutual Insurance Company brochure, circa 1963

**Photographic Material Series, 1888-2008 and undated**

(22 boxes)

The thousands of photographs in this series depict North Carolina Mutual Insurance's history, its employees and their families, and the history of their communities. The images range from formal portraits and group shots to snapshots taken at banquets, conventions, meetings, on trips, and around the office. There are many 19th century photographs of NCM leaders and their families, staff, including women workers, the earliest home office buildings, office interiors, and community events. Individuals depicted in later images include NCM officers, employees, their families, and prominent figures such as Robert F. Kennedy, Martin Luther King, Jr., Spiro Agnew, Jesse Jackson, ambassadors, and other politicians. Many significant original images were reproduced by NCM in various sizes and for various purposes; some of these reappear in the Exhibits Series material. The bulk of the 20th century images were produced by the Public Relations Department for *The Whetstone* and *The Pilot* and are therefore often marked for cropping and resizing. Although some images are captioned with names, years, and locations, many are unmarked and many dates have been estimated. Some related paper material, such as clippings, biographical sketches, speeches, copies of publications, and memos transmitting the images, can also be found with the prints.

Photographic material has been arranged into subseries by medium, but there are slides, negatives, and negative reproductions also found with corresponding prints in the Prints Subseries. Comprising the bulk of the series, the Prints Subseries has been arranged into Events, Historic Images, Other Public Relations, People, and Places Subseries. However, many of the images in these subseries overlap. Related items can also be found in the Exhibit Material Series.

Large format photographs and albums are located in the Oversize Material section of the collection guide. These items include historic images of the company's early offices, portraits of senior administrators, group shots at banquets and other events, and images of the NCM home office buildings.

**Negatives Subseries, 1900-2008 and undated**

Contains negatives and negative reproductions stored separately from prints. Items are arranged in loose chronological order and then into broad categories by content. Negatives directly associated with prints are located in the Prints Subseries.

**Box 113**

Inventory of the North Carolina Mutual Life Insurance Company Archives, 1850-2008 and undated, bulk 1898-2008
People and places, 1900-1950 (21 negatives)
People, 1960-1980 (13 negatives)
Events, 1960-1980 (3 negatives)
People and office, 1980-1990 (2 folders; 25 negatives)
Events, 1980-1990 (6 folders; 57 negatives)

Box 114

People and office, 1990-2000 (2 folders; 20 negatives)
Events, 1990-2000 (3 folders; 46 negatives)
People, 2000-2008 (3 folders; 9 negatives)

Prints Subseries, 1888-2008 and undated

Mostly produced by the Public Relations department for publications such as *The Whetstone* and *The Pilot*, the prints are arranged into Events, Historic Images, Other Public Relations, People, and Places subseries, and then chronologically. Negatives and slides directly associated with prints and related paper material are also located in this subseries.

**Events, 1944-2008 and undated**

Arranged chronologically, these images depict banquets, conventions, trips, and meetings hosted or attended by NCM staff. Most but not all were labeled. Prominent events include annual meetings of the National Insurance Association, a 1964 speech by Robert F. Kennedy, a 1964 trip to Mexico and Central America, and the celebration of NCM's 85th anniversary in 1983. Other events include awards ceremonies, retirement celebrations, the Annual Policy Holders' Meeting, Founders' Day, enrollment drives, and charitable events, such as an AIDS Walk and blood drives. Prominent event titles are included. Individuals depicted include NCM officers, employees, their families, politicians, and figures such as Robert F. Kennedy, Spiro Agnew, Jesse Jackson, and the Nigerian ambassador. Some negatives and related paper materials are also included.

Box 114

Conferences and meetings, 1944-1970 (2 folders; 114 prints)
Cloudburst, 1960-1985 (20 prints)
School in Agency Management, 1962 (1 print)
Ambassador of Nigeria visit, 1964 Feb. 23 (18 prints)
Spaulding trip to Mexico and Central America, 1964 (76 prints)
Spaulding convention, 1967 (11 prints)
White House event, 1969 May 12 (2 prints)
NIA Convention in Richmond, 1970 (2 folders; 50 prints)

57
Box 115

John Avery Boys' Club event, circa 1970s (2 prints)
Events, 1970-1980 (4 prints)
NIA Convention in Houston, 1980 (2 folders; 68 prints)
Tailgate party, 1980 Sept. (20 prints)
Events, 1980-1990 (3 folders; 263 prints)
NIA Convention in Atlanta, 1981 (45 prints)
85th Anniversary events, 1983 (8 of 18 folders; 175 prints)

Box 116

85th Anniversary events, 1983 (10 of 18 folders; 139 prints)
Dr. Cleland Tribute, 1985 (14 prints)
Russell Blunt Reception, 1986 (9 prints)
Annual Policy Holder's Meeting, 1968 (5 prints)
Blood drive, circa 1986 (13 prints)
Olympic Festival, 1987 (18 prints)
Sales Manager School, 1987 (43 prints)
Awards luncheon, 1989 May 19 (12 prints)
Convention and trip snapshots, 1989-1995 (2 folders; 166 prints)
Field Accounting System training, circa 1990 (48 prints)
Fellowship event, circa 1990 (37 prints)
94th Founders Day, 1992
Ron Brown Reception, 1992 (9 prints)
Annual Policyholders' Meeting, 1993, 1994 (2 folders)
Proactive Management Workshop, 1994 (1 print)
Events, 1990-2000 (1 of 18 folders; 52 prints)

Box 117

Events, 1990-2000 (8 of 18 folders; 942 prints)

Box 118

Events, 1990-2000 (9 of 18 folders; 747 prints)
Johnny Cochran reception, 1996 (7 prints)
Stagville event, 1997 (89 prints)
Box 119

Events, 2003-2008 (10 of 11 folders; 919 prints)

Box 120

Founders' Day album, 2003 (1 photo album)

Box 121

Events, 2000-2008 (1 of 11 folders; 132 prints)
National Insurance Association (NIA) convention, 2003 (2 folders; 267 prints)
NCCU event, 2004 (205 prints)

Historic Images, 1888-1952 and undated

Contains early images of officers, employees, their family members, corporate meetings, the NCM office, and groups related to NCM, such as Thrift Clubs, musical groups, and sports teams. Other historic images can also be found in the People Subseries. Arranged by content in loose chronological order.

Box 121

John Merrick and family, circa 1885-1915 (3 folders; 12 prints)
Officers, circa 1890-1930s (4 prints)
Home office clerks, 1909 (1 print)
Mrs. C.S. Moore; Booker and Charles Spaulding, Jr., circa 1910 (2 prints)
Merrick residence, circa 1910 (2 prints)
Booker T. Washington visit, 1910 (3 prints)
Office images, circa 1910-1940 (8 prints)
A.M. Moore, 1919-1923 (4 prints)
C.C. Spaulding, circa 1920-1952 (2 folders; 49 prints)

Box 122

Meetings, circa 1920-1940 (7 prints)
People, circa 1920-1950 (37 prints)
Glee Club, Quintet, and sheet music for "Dreams", circa 1929 (4 prints)
Merrick family, circa 1930-1960 (10 prints)
William Kennedy, Jr., circa 1930 (2 prints)
Thrift Clubs, circa 1933-1941 (19 prints)
Tennis championship, 1938 Sept. 3 (1 print)
Mrs. E.H. Berry and daughter, 1939-1944 (10 prints)
Model of office, circa 1930 (1 print)
Payment of first claim in Atlanta office, circa 1940 (1 print)
Master contract delivery, 1945 Mar. (1 print)
Basketball team, undated (1 print)

**Other Public Relations Files, 1942-2008**

Arranged in loose chronological order, subseries contains intermixed images of events, people, and places produced by the Public Relations Department for exhibits and publications such as *The Whetstone* and *The Pilot*. Some folders are related to specific issues of publications or composite pages while others are more intermixed. Many of the images in this subseries overlap with other subseries. Those depicted include NCM officers, employees, their families, policy holders, politicians, and prominent figures such as Robert F. Kennedy, Martin Luther King, Jr., and Jesse Jackson. Some negatives, reprints of older images, clippings, and related paper materials are also included. The bulk of the material dates from the 1960s.

**Box 122**

PR, 1942-1987 (4 folders; 125 prints)
PR, 1950-1970 (4 of 5 folders; 165 prints)

**Box 123**

PR, 1950-1970 (1 of 5 folders; 35 prints)
PR, 1950-1990 (2 folders; 31 prints)
PR, 1950-2000 (15 prints)
PR, 1960-1970 (14 of 25 folders; 362 prints)

**Box 124**

PR, 1960-1970 (11 of 25 folders; 290 prints)
The Pilot materials, 1960-1980 (3 folders; 143 prints)
PR, 1960-1980 (6 folders; 111 prints)

**Box 125**

PR, 1970-1980 (7 folders; 190 prints)
PR, 1970-1990 (4 folders; 81 prints)
PR, 1980-1990 (6 of 12 folders; 219 prints)

**Box 126**

PR, 1980-1990 (6 of 12 folders; 123 prints)
PR, 1980-2000 (10 folders; 483 prints)
PR, 1980-2008 (25 prints)
PR, 1990-2000 (3 folders; 81 prints)

**Box 127**

Collins scrapbook, 1992-1995 (21 prints)
Exhibit photographs (6 folders; 183 prints)
Contains reprints of photographs and drawings from different periods in NCM history, compiled for exhibits in the 1980-2000 period.

Exhibit photos from NIA Convention, 2003 (11 prints)

**People, 1910-2008**
Arranged into employees, officers, and other people subseries.

**Employees, 1910-2008**
Contains portraits and group photographs of NCM employees from the home office and various district offices. In addition to headshots, employees are shown working and attending various events. Arranged by location, when possible.

**Box 127**

Baltimore district, 1940-1962 (36 prints)
Birmingham district, 1940-1970 (51 prints)

**Box 128**

Chicago district, 1950-1970 (19 prints)
Georgia district, circa 1910-1980 (3 folders; 115 prints)
Los Angeles district, circa 1960 (25 prints)
Newark district, 1950-1970 (63 prints)
Norfolk district, 1993 (1 print)
North Carolina district, circa 1930-2000 (5 folders; 246 prints)
Pennsylvania district, 1940-1980 (109 prints)
South Carolina district, circa 1920-1980 (90 prints)
Tennessee district, 1930-1980 (2 folders; 117 prints)

**Box 129**

Washington DC district, 1930-1965 (54 prints)
Women, 1926-2008 (7 folders; 106 prints)
Other employees, 1940-2000 (8 folders; 406 prints)
Other employees, 1975-2008 (1 of 8 folders; 13 prints)
Box 130

Other employees, 1975-2008 (7 of 8 folders; 300 prints)

**Officers, 1910-2008**

Contains portraits and group photographs of NCM presidents, officers, Board of Directors, and Executive Committee. Images of officers’ family members are also included. Contains formal portraits, group photographs, and snapshots taken at various events. Arranged in loose chronological order.

Box 130

Merrick, Kennedy Jr., Kennedy III, and Sloan headshots, 1910-1990 (8 prints)
Board of Directors, 1929-1995 (4 folders; 69 prints)
C.C. Spaulding, circa 1940-1952 (14 prints)
C.C. Spaulding, Cox, and Merrick visit to Atlanta, 1934 (1 print)
J.L. Wheeler, 1943-1957 (9 prints)
W.A. Clement, 1950-1998 (2 folders; 79 prints)
Joseph W. Goodloe, 1952-1972 (2 folders; 75 prints)
Officers at various events, 1955-1968 (2 of 5 folders; 82 prints)

Box 131

W. A. Clement and Asa Spaulding, circa 1960 (3 photo albums)

Box 132

Officers at various events, 1955-1968 (3 of 5 folders; 106 prints)
Asa T. Spaulding, 1956-1968 (2 folders; 68 prints)
William J. Kennedy, III, circa 1983-1986 (2 folders; 13 prints)
Executive Committee, 1987-1988 (10 prints)
Bert Collins, 1987-1996 (2 folders; 30 prints)
William J. Kennedy, III and Bert Collins, circa 1990 (60 prints)
James Speed, 2004-2008 (27 prints)

**Other People, 1930-2008**

Contains various portraits and group photographs of employees, family members, policy holders, executives from other insurance companies, scholarship recipients, and HBCU administrators. Arranged in loose chronological order.

Box 132

Policy holders, 1930-1970 (141 prints)
University and high school students, 1935-1965  (76 prints)
Merrick and Moore Scholars, 1938-1970  (73 prints)
Group shots, 1940-1965  (22 prints)

**Box 133**

Military service, circa 1945-1970  (10 prints)
Employees, policy holders, and other people, 1945-1990  (4 folders; 220 prints)
HBCU administrators, 1950-1970  (21 prints)
People, 1980-2008  (7 folders; 176 prints)

**Places, 1905-2008**

Primarily contains images of the North Carolina Mutual physical plant, including different office buildings, men and women staff members on the job, workspaces, equipment, mainframes, decorations for specific events, and the construction of the 1965 home office. Includes photographic images of the original office buildings from 1905 to an architect's rendering of the new home office, circa 1963. Other images of the home offices can be found in oversize photo boxes and in the exhibits series. Of particular interest are images of NCM employees' homes, which are labelled with the employee's name, rank, and city. Also included are images of Durham and snapshots from business trips to Puerto Rico and Miami.

**Box 133**

Employees' homes, 1930-1960  (52 prints)
Physical plant and office scenes, and home office buildings, 1905-2008  (9 folders; 154 prints)

**Box 134**

Hurricane Hugo damage, 1989  (16 prints)
Trip snapshots, circa 1988-1995  (46 prints)
List of digital images of a variety of locations, 2007

**Oversized Prints**

**Box OV27**

Robert F. Kennedy at NIA convention album, 1962

**Box OV28**

Meeting album, 1985
Marketing Mid-Year Conference album, 1993

**Box OV29**

Event album, 1994
Annual Policyholders' Meeting, circa 2004

**Box OV30**

Historic Images (4 folders)

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

**Box OV31**

Historic Images (5 folders)

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

**Box OV32**

Events, People, Places (7 folders)

**Box OV33**

Historic Images, People, Places (6 folders)

**Box OV34**

Historic Images, Events (8 folders)

**Box OV38**

Historic Images, Events (1 folder)

**Box OV45**

NCM District Managers' meeting, circa 1940s (1 folder)

**Folder 6**

Very large panoramic photograph mounted on board, 27x75"

[Not open to use due to fragile nature of item. Slated for conservation treatment.]

**Slides Subseries, 1960-2005**

Contains slides stored separately from prints. Items are arranged in loose chronological order. Slides directly associated with prints are located in the Prints Subseries.

**Box 134**

Asa Spaulding, circa 1960

Events and people, 1989

People and office, 2000-2005

**Print Material Series, 1903-2008 and undated, bulk 1920s-1990s**
Arranged into the following subseries: NCM Publications, Non-NCM Publications, and Periodical Clippings. The first two subseries are further subdivided into two large format groupings: Pamphlets and Other Publications, and Serials. These files were assembled by NCM staff, and offer a rich array of material on African American history, culture, and businesses. Formats include essays, reports, pamphlets, brochures, fliers, newsletters, newspapers, journals, popular serials, internal publications, promotional literature, and obituaries. There are also oversize sections at the end of each subseries, chiefly housing newspapers and other serials; early issues of Durham newspapers can be found here, as well as issues of mainstream magazines such as Ebony. The Non-NCM subseries in addition contains a large sub-grouping of print items related to Durham's historically black North Carolina Central University, including campus newspapers and events programs. The substantial clippings file was assembled by the Public Relations Department, and is arranged topically; there are significant amounts of materials on the civil rights movement. Subseries and their contents are fully described below.

NCM Publications Subseries, 1903-2008 and undated

Pamphlets and Other Publications

Various publications issued by North Carolina Mutual, including programs from memorial services; publications commemorating company anniversaries and the opening of new offices; The Mutual Album (a booklet containing photographs and biographies of NCM's founders and early employees); "Education in our Democracy" (a reprint of a speech that W.J. Kennedy, Jr. gave at Fort Valley State College); The Negro's Adventures in the Field of Life Insurance and Partners in Business (instructional tracts written by W.J. Kennedy, Jr. and Asa T. Spaulding, respectively); and various sales, promotional, and recruitment material, and training manuals. Arranged alphabetically by title or subject.

Box 135

Annual Report 1994 (3 folders)
"Black Achievement," calendars, 1977-1979
Charters, bylaws, and resolutions, 1971-1984
"Cloudburst All-Stars," 1985
"Education in our Democracy," undated
Employee wellness program, 2002
"Facts about African Americans" pamphlets, undated
Founders' days/anniversaries, 1969-2008
"Founders Memorial Services," pamphlet, 1983
Funerals and memorial services, 1944-2005 (2 folders)
Health bulletin, undated
Inventory of the North Carolina Mutual Life Insurance Company
Archives, 1850-2008 and undated, bulk 1898-2008

Home office ground-breaking/dedication, 1963-1966
Internal promotional material, 1961-1985 (3 folders)
Internal promotional material, 1986-1987 and undated (2 folders)
"Living and Working Together the Mutual's Way," 1953
"Memorial Service for Deborah Watts Hill," pamphlet, 1993
Music recital program, undated
The Negro's Adventures in the Field of Life Insurance, 1934-1937 (3 folders)
North Carolina Mutual: A Symbol, 1960-1964

Box 136

Office openings, 1946-1950
Office and officer images, undated
Partners in Business, 1940
Proceedings of the Annual Agents' Conference, 1920
Program honoring Asa Spaulding, 1959
Remington Rand Punched-Card Applications, undated
"Retirees Anniversary Banquet," pamphlet, 2005
Sales and promotional material, undated (10 folders)
"Statistical Bulletin," 1923
Training manuals/guides, 1927-1988 and undated (6 folders)
"Your Career" recruitment pamphlet, undated

NCM Serials

Serials printed by NCM for distribution to its employees. Consists primarily of The Review and The Whetstone, some groups of were placed in binders. A miscellaneous binder contains various NCM publications, including an issue of The Whetstone (second quarter 1963); two issues of The Mutual; a pamphlet about the origins and history of the company (dated November 23, 1921); and the proceedings of the Annual Agents' Conference of 1920. Listing includes oversize material, found at end of grouping. Arranged alphabetically by title, then chronologically within.

Box 137

The Hotline, 1988-1997
[Some items removed to Oversize Material.]

The North Carolina Mutual cover, 1903 Sept., clippings 1906 Jan.
[Some items removed to Oversize Material.]
Inventory of the North Carolina Mutual Life Insurance Company Archives, 1850-2008 and undated, bulk 1898-2008

The Mutual, 1923 June, 1923 Nov., 1924 Apr., 1927 Apr., 1929

Newsorama, 1960-1961

The Review, 1933-1966 Sept. (11 folders)

Box 138


Box 139


Box 140

The Review (bound issues), 1956-1957 June (3 binders)

Box 141

The Review (bound issues), 1957 July-1959 June (4 binders)

Box 142

The Review (bound issues), 1960-1961 (4 binders)

Box 143

The Review (bound issues), 1962-1963 (3 binders)

Box 144

The Review (bound issues), 1963-1964 Dec. (4 binders)

Box 145

The Review (bound issues), 1965 (3 binders)

Box 146

The Review (bound issues), 1966 (2 binders)

Box 147

The Review (bound issues), 1967 (2 binders)

Box 148

The Review (bound issues), 1968 (2 binders)

Box 149

The Review (bound issues), 1969-1970 (3 binders)

Box 150

The Review (bound issues), 1971-1972 (3 binders)

Box 151

The Review (bound issues), 1972-1974 (3 binders)

Box 152
The Review (bound issues), 1976-1977 (3 binders)

Box 153

The Review (bound issues), 1977-1978 (2 binders)

Box 154

The Review (bound issues), 1979-1981 (2 binders)

Box 155

The Review (bound issues), 1982-1985 (2 binders)

Box 156

The Review (bound issues), 1989 (1 binder)

The Whetstone, 1924-1931 (9 folders)

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

Box 157

The Whetstone, 1932-1939 (13 folders)

Box 158

The Whetstone, 1940-1952 (14 folders)

Box 159

The Whetstone, 1953-1964 (12 folders)

Box 160

The Whetstone, 1965-1977 (13 folders)

Box 161

The Whetstone, 1978-1998 (11 folders)

The Whetstone (bound issues), 1943-1950 (1 binder)

Box 162

The Whetstone (bound issues), 1947-1959 (2 binders)

Box 163

The Whetstone (binding removed), 1960-1967 (3 folders)

Miscellaneous publications (bound), 1920-1963 (1 binder)

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]
Inventory of the North Carolina Mutual Life Insurance Company Archives, 1850-2008 and undated, bulk 1898-2008

Box OV38

*The North Carolina Mutual*, 1903 Sept. [frame removed]

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents may need to be reproduced before being handled.]

**Non-NCM Publications Subseries, 1914-2006 and undated**

**NCCU-Related Publications**

Material related to North Carolina Central University, including commencement programs, course guides, an issue of the campus journal *Varia*, issues of the campus newspaper *The Echo*, and issues of the faculty newsletter *The Faculty Fuzz*. Includes oversize material, given at end of grouping.

Box 163

Annual catalogue, 1959-1960

Annual catalogue, 1961-1962

Commencement programs, 1959-1964

Summer school, 1951

Miscellaneous publications, 1960-1992 and undated

[Other items in oversize folder.]

*Varia* journal, 1963

Box OV35


*Faculty and Staff Fuzz*, 1963, 1965 (5 issues)

**Non-NCM Pamphlets and Other Publications**

Various items related to organizations other than North Carolina Mutual. Includes a large collection of material related to African American history; a number of government publications (primarily concerning either the African American population or the state of the economy); files from a 1973 audit of NCM conducted by the firm Ernst and Ernst; brochures and booklets related to health education; and publications produced by the NAACP, the National Urban League, the Southern Regional Council, the National Insurance Association, the Institute of Life Insurance, *Ebony*, the United Negro College Fund, the National Council of Negro Women, and the Peace Corps, among many others. Arranged in alphabetical order by title or subject, with oversize material at the end.

Box 164

American Heart Association Pamphlets, undated
"Archives * Records, DC," 2006
Atlanta Home Horizons, 1962
"Bits and Pieces," undated
"Blacks and Hispanics in the United States," 1979
Black history:
American Traveler's Guide to Negro History, undated
Arno Press, "Black Studies Program" catalog, 1972
"The Black Presence in North Carolina" exhibition program, 1978
Blacks in the Westward Movement, 1975
Calendars, 1983-1985
"Fifty Years of Progress" pamphlets, 1950
Flags of Famous Black Military Units, 1976
"Golden Legacy" comic book, 1984
Merzette coloring books, 1985
"Negro History Week: A National Celebration," undated
"The Pride and the Passion," 1983
Blue Cross/Blue Shield of North Carolina annual report, 1994
British and Foreign Anti-Slavery Reporter indices, 1840-1846, 1854, 1857-1860 [photocopies]
Business training pamphlets, 1948-1983 and undated
Choose a Career That Counts, 1959
Civil Rights and the South: A Symposium, 1963
Conference Board publications, 1966-1969 and undated (3 folders)

Box 165

Corporate Structure, 1993
Diego Rivera/Mexico tourism material, postcards, undated
"Durham: A Rare Combinations of Qualities," undated
Durham County Almanac, 1925
Ebony Publications on "Negro Market Potential," 1965 and undated
Ernst and Ernst audit, 1973 (3 folders)
"An Evening with Chuck Davis," program, 1992
"Falcon Song," World Expo pamphlet, 1992
Federal Records Centers folder with various pamphlets, leaflets, undated
Government publications:
  Black Americans: A Chartbook, 1971
  Causes of Negro Insurance Company Failures, 1937
  Committee for Economic Development, 1968-1969
  Department of Labor, 1965-1966
  Franchise Company Data, 1968
  General Services Administration occupancy guides, 1963-1965
  "National Negro Health Week," 1928
  The Negro Woman Worker, 1938
  Office of Economic Opportunity, 1967
  Third Report of Insurance Companies Owned and Operated by Negroes, 1949

Box 166
Health education, 1994-1998 and undated (3 folders)
History Speaks, 1932
Home Insurance Companies, 1933
"In Loving Memory of Mr. Willie C. Lovett" program, 1992
Institute of Life Insurance, 1959 and undated
"The Integration of the Negro into the United States Navy," 1948
Joint Center for Political Studies, 1982
Life Insurance Facts for Business Women, 1956
Martin Luther King and The Montgomery Story, 1956
Musings of a Teenager, Lawrence A. Dunmore, 1974
National Archives brochures, 2005
NAACP publications, 1955-1963 (2 folders)

*National Negro Finance Corporation*, 1924

"National Negro Business League Annual Report", 1914

National Insurance Association member roster, 2002

National Urban League "Building for the Future," 1956

"The Negro and the Depression in North Carolina," 1933

"Negro History Week," pamphlet, undated (2 copies)

The Newcomen Society, 1958-1960

"A New Era on Parrish Street" pamphlet, circa 2004


North Carolina AIDS resource directory, 1989

**Box 167**

North Carolina Black Leadership Caucus fifteenth annual conference, 1991

North Carolina Human Relations Council, 1978

Peace Corps publications, 1961 and undated

*Physical Distribution: Key Points for Presidents*, 1967

Position paper, Allan P. Sindler, undated

*Preparing the Annual Report*, 1960


Race in the News, circa 1950

*Reading Course in Executive Technique*, 1948

"Register to Vote" flier, undated

*The Road to Justice: Three Major Statements on Civil Rights by President Lyndon B. Johnson*, 1965

Russian scholarship, 1952-1955 and undated


Southern Regional Council publications, 1960 and undated

*A Survey of the Years 1898-1899*, 1958

Tax law information, 1966-1979

"They Call Him 'Co-operation,'" 1943 (2 copies)

"They Defend Genocide and Cannibalism", remarks of Hon. Claude Pepper, 1965 Feb. 17
"Thomas Day, Cabinetmaker" exhibition program, 1975 (2 copies)
Thomas F. Keller Center dedication, 1996
Triad Black Business Expo program, 1994
United Negro College Fund, 1958-1964 and undated
University of North Carolina commencement, 1967
Urinary Analysis by Chemical Examination, 1923
"Vacuum Freeze-Drying," undated
Vocational Training Opportunities in North Carolina, 1963
You Can Go Places and See Things in the Life Insurance Business, undated

Box OV14
City of Durham master plan report, 1959
Cosmopolitan Chamber of Commerce report on Chicago, 1965

Box OV35
White Rock Baptist Church: A Brief History, undated

Non-NCM Serials
Several serials not published by NCM, including many issues of The Journal of Negro History and The Pilot, official journal of the National Negro Insurance Association. Arranged in alphabetical order by title, with oversize material at the end.

Box 167
American Visions, 1990 June
The Atlantic, 1940 May
Best's Insurance News, 1943-1967

Box 168
Best's Life Rating Chart, 1928, 1930
Blackbook, 1983
Black Business Digest, 1973 May
Black Enterprise, 1974-1993 (4 folders)
Black Southerner Magazine, 1982
Caravan, 1965 April/May
Chief Legal Executive, Winter 2003
Concrete Facts, undated (Vol. 12 #2)
Concrete Products, 1965 May
The Crisis, 1931-1968 (2 folders)
Dollars and Sense, 1983-1986
Durham Report, undated
Ebony, 1955 (reprints); 1985; 2005
Humanities, 2006 May/June
Input, 1966
Inside Track, 1987 Fall
The Insurance Examiner, 1939 Mar.

Box 169

The Insurance Leader, 1919-1920
Intercollegiate Digest, 1935 Nov. (2 copies)
Jet, 1983-2005
The Journal of Negro History, 1962-1996 (8 folders)
The Kappa-Alpha-Psi Journal, 1926-1929
Local History and Genealogy, 1948
The Message, 1951 Sept.
The Mouthpiece, 1925 Feb.
The Nation, 1952, Sept. 27
National Negro Digest, circa 1937

**Box 170**

Negro Progress in North Carolina, 1950-1964 (3 folders)
The Negro Worker, 1944 July
The New York Stock Exchange Magazine, 2005 May/June
Opportunity, 1923-1935
Pageant, 1963 July
The Pilot, 1951-1954 (8 folders)

**Box 171**

The Pilot, 1955-1965 (17 folders)

**Box 172**

The Pilot, 1966-1978 (13 folders)
Probe, 1961 April
The Quarterly Journal, 1940 October
The Radiator, 1922-1923 (4 folders)
The Saturday Evening Post, 1945 Mar. 27
Sepia, 1983 July
The Trumpet of Conscience, undated (Vol. 1, No. 2)
The Underwriters' Forum, 1947 Jan.-May
The Wayfarer, 1965 Fall
Weekly News Review Digest and Best's Insurance News, 1924-1940
Carries extensive handwritten annotations and lists.

**Box OV9**

The Messenger, 1927 Mar.

**Box OV14**

The Saturday Evening Post, 1943 Mar. 27

**Box OV36**

The Triangle Tribune, 1998 Oct. 11 (NC Mutual 100th anniversary edition)
Tribune supplement, 1966, and The Durham Morning Herald, 1973 Nov. 4
Inventory of the North Carolina Mutual Life Insurance Company
Archives, 1850-2008 and undated, bulk 1898-2008

*Chicago Daily Defender*, 1965 Dec. 8-9
Photocopy of *The Durham Sun*, 1921 Dec. 31, and *Campus Echo*, 1957 Feb. 28
*The Insurance Field*, 1926 Aug. 6

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

**Box OV37**


**Box OV38**

*The Little Voice*, 1927 July 9


*The Carolinian*, 1983 Feb. 17


*Durham Morning Herald*, 1966 Mar. 12, Apr. 3; 1968 May 5; 1981 Apr. 26

*The Durham News Journal*, 1966 Mar. 31

*The Durham Sun*, 1966 Mar. 31

*The Macon Courier*, 1983 Feb. 15

*The News and Observer*, 1992 June 17

*The Philadelphia Tribune*, 1983 Feb. 8

*The Wall Street Journal*, 1994 Sept. 27

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents should be photocopied before being handled.]

**Periodical Clippings Subseries, 1906-1996 and undated**

Contains groups of clippings, mostly assembled by the Public Relations Department, from mainstream national and local newspapers, university newspapers, and African American publications. Arranged alphabetically by topic.

[Clippings are minimally processed - please handle with care.]

**Box 173**

Civil rights, 1947-1960 (3 folders)
League of Women Voters, 1950-1953
North Carolina newspapers, 2005
Richmond, Tyronza, 1994
Spaulding, C.C., undated
Tillotson College, undated
Tougaloo Southern Christian College, 1945-1956
Town Hall world tours, 1949-1953
Toure, Sekou, 1959-1961
Tuskegee Institute, AL, 1949-1958
Various topics, 1955-1968, 1984 (3 folders)
Some items removed to Oversize Material.
Washington, Booker T., 1946-1960
Washington, George, 1953
Watchtower Life Insurance Company, Houston TX, 1939
Weaver, Robert C., 1961-1962
Wilberforce University, OH, 1949-1956
Wiley College, TX, 1958
William Penn Business School, 1951
Williamsburg VA, 1962
Winston Mutual Life Insurance Company, 1935-1957
Winston-Salem Teachers' College, 1961

Box 174

Wit and humor (wise sayings), 1948-1955 (2 folders)
Women of the Week and Year, 1949-1957
Wright, Richard, 1961
WTCU, 1949-1953
Xavier University, 1949-1952
Y-Teens, 1955
Ye Towne on Queen Anne's Creek, 1962
YMCA, 1949-1957
YWCA, 1950-1958
Zeta Phi Beta sorority, 1950-1953

**Box OV4**
Various topics, 1955-1967

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents may require photocopying before being handled.]

**Box OV9**

**Box OV23**

**Box OV35**
Civil rights, *The Picture News*, 1947 Nov. 2
C.C. Spaulding, 1942 Dec. 12

**Box OV39**
NCM, 1921, 1926
Laminated NCM clippings, 1906, 1921, 1966, 1988
Kennedy, Jr., W.J., 1952-1958
Wheeler, J.L. funeral notices, 1957 Apr. 22
Lawsuit and annual meeting, 1972-1973
Various topics, 1943-1966 (3 folders)
Various topics, 1983-1996 (5 folders)

[Some of the materials in this box are fragile and in need of preservation. Please contact a reference archivist to use this material, as contents may require photocopying before being handled.]

**Recordings Series, 1943-circa 1970s**

(24 boxes and film cans)

Series houses sound and moving image recordings spanning many decades and documenting milestones in North Carolina Mutual History. Formats include audiocassettes, audio tape reels, film...
reels, and videocassettes.

Audiocassettes are few in number and include a set of home-study tapes on insurance practices.

Subjects of films include a history of North Carolina Mutual; the history of "Black Wall Street" in Durham; the groundbreaking and dedication ceremonies for the current headquarters building on Chapel Hill Street in Durham; and advertisements and broadcasts about NC Mutual products and services. Titles of films listed have been taken from original canister or box labels. Many of these films were copied in digital format to DVD, around 2002 (see listings of digitized moving images in Digital Material Series).

[Original audiovisual recordings are closed to use. Use of these materials may require production of listening or viewing copies. Please contact a reference archivist before coming to use this collection. Slated for further preservation and identification work.]

**Audio Recordings Subseries, 1987**

[Original audiovisual materials are closed to use. Use of these materials may require production of listening or viewing copies. Please contact a reference archivist before coming to use this collection.]

**Box 175**

HS 328, Investments - audio cassette for home study created by Insurance Achievement, Inc., 1987 (5 cassettes)

[Removed from Office of the President, Bert Collins Subseries.]

"The Great Transition," 1977 (3 cassettes)

Program on social reform? Removed from Social Groups and Events Series.

**Box 175-A**

Audio tape reels (22 reels)

Primarily consists of radio commercials. 3", 4", and 5" reels.

**Box 175-B**

Unidentified audio tape reels (3 reels)

Unlabeled, 8" reels.

**Box 175-C**

Adventures in Negro History

Set of commercially produced record albums (LPs) with booklet.

The Saxton Show, 1962 Feb. 15
Radio show featuring guests Asa Spaulding and H.J. Clement, 10.5" reel.

Films Subseries, 1948-1976 and undated

Series of NCM-produced films and advertising spots, including a history of NCM created in 1948. Film footage is approximate. All but FILM 17 are reels of film; FILM 17 is an archival box housing multiple films.

[Original audiovisual materials are closed to use. Use of these materials may require production of listening or viewing copies. Please contact a reference archivist before coming to use this collection.]

Box 1

"Black Ambassador, Home and Abroad, "circa 1976 (2550 feet)
"Shipped to WRAL-TV...6/25/76." Memorex video tape, 2".

Box 2

"Hi band dub N.C. Mutual Founders' Day 29:19, "1970 October 24 (3200 feet)
RCA video tape, 2".

Box 3

"Dubs of NC Mutual Founders Day, "undated (3200 feet)
RCA, video tape, 2".

Box 4

"WTTW #47325 Spaulding Spots, "circa 1964
WTTW in Chicago. Three small reels inside 11.5" can.

Box 5

"Success Story, "undated
"Missing most of title."

Box 6

"NC Mutual, "1966 (747 feet)
Charles Crone Agency. Black and white 16mm film.

Box 7

"Dedication Ceremony, "1966 (1200 feet)
16mm film.
Box 8
"Groundbreaking, "circa 1965 (1200 feet)
"Film and video tape division WTTW Chicago."

Box 9
"Success Story 1948 800 in. full reel, "undated (800 feet?)
16 mm film.

Box 10
"NC Mutual Ads #1-4, Dangerfield, "undated
Container houses 3.5" reel with one film; and one 4.75" reel with four films on it, according to
labels. 16mm format.

Box 11
"NC Mutual, Charles Crone Assoc., "undated (500 feet)
16mm film.

Box 12
"NCM Dedication Ceremonies, "1966 (700 feet)

Box 13
"NC Mutual 'Success Story,' "undated (500 feet)

Box 14
"NC Mutual," circa 1966 (100 feet, 2 reels)
"Humphrey 1966." WTTW kine negative original.

Box 15
"NC Mutual, "1966 April 15 (810 feet)
WTTW kine negative original. Also on can: "Humphrey neg 1966." 16mm, sound.

Box 16
"The Quiet Road to Success, VTR #1, 29:30," WRAL-TV 5, Raleigh

Box FILM 17
"Tribute to Martin Luther King, January 14, 1972, 2:37": Producer: Clayton Weaver
"North Carolina Mutual, Jogger, 0:30, 28 May '81": Brand Edmonds Packett, WDBJ-TV7, Roanoke
"NC Mutual Insurance, Jogger, 0:30, 10-17-80": WPTF-TV28
'NC Mutual, NCMU-0130, 0:30, dub 9/3/81": WRAL-TV5, Raleigh
"The Achiever," 0:30 commercial spot, color (7 copies)
"Success Story,"b/w, mailed 1959 Oct. 12  (includes small sections that were removed from the enclosed film)
[This film is in need of preservation. Please contact a reference archivist to use this material, as contents should be treated before being handled.]

Box FILM 18

Box FILM 19

Film reels (19 film reels)
primarily consists of television commercials on 16 mm film.

Videocassettes, 1992-1999 and undated
Titles and dates are taken from original container labeling. Total running time (TRT) given when possible. Arranged in alphabetical order by title.
[Original audiovisual materials are closed to use. Use of these materials may require production of listening or viewing copies. Please contact a reference archivist before coming to use this collection.]

Box 175A

"Antique Truck" [U-Matic, TRT :30]

Box 176

"Community Mental Health and Health Care Reform, with Dr. Fred McCall Perez, a member of President Clinton's Health Care Task Force," 1990s [VHS, TRT :30]
"NIA 1997 Atlanta, Howard Catching and Coretta Scott King" [VHS]
"NIA 1997 Awards Banquet" [VHS]
"NIA 1997 President's Banquet, J. Lowery" [VHS]
"95 Years of Sales and Service," 1993 [VHS]
"NCM Centennial Celebration Documentary," 1999 [VHS]
"NCM Christmas,"1992 [VHS]
"NCM Employee Forum," 1999 [VHS]
"NCM: The First 100 Years," ca. 1999 [VHS]
"NCM 94th Founders Day Program, "1992 [VHS]

Scrapbooks Series, 1912-1975
(6 boxes)
Varying in size and condition, these scrapbooks commemorate the history of North Carolina Mutual Life Insurance through clippings, photographs, memos, programs, and other items. Also found in the photographic material section in the Oversize Material Series are photo albums that also commemorate company personnel, conferences and other events, and milestones.

[Scrapbooks are fragile; some are slated for further preservation treatment. Please contact a reference archivist before coming to use this material.]

**Box OV40**
Scrapbook 1, 1966

Commemorating the dedication of new home office building, this scrapbook chiefly contains many pages of congratulatory messages in the form of letters and telegrams, many from notable officials, politicians, and businessmen.

**Box OV41**
Scrapbook 2, 1975

History of NC Mutual from its beginnings to the 1970s. Almost completely made up of cut-outs from the company publication *Whetstone*.

**Box OV42**
Scrapbook 3, 1961-1967

Contains newspaper clippings of NCM advertisements, along with a photograph, clippings of competitor's ads, and an event program. Approximately 25" x 17".

**Box OV43**
Scrapbook 4, 1920-1939

Eighteen-page portfolio (approximately 13" x 16") belonging to calligrapher and illustrator Walter W. Micheaux. Micheaux was recognized as an expert penman and, after moving from South Carolina in 1916, illustrated and hand-lettered the insurance policies, publicity, logos, and other material for NCM for over 20 years. Scrapbook contains many original examples of his work, as well as a 1928 clipping about him (with photo), and a small photo of him as an older man.

[Extremely fragile. Slated for conservation treatment. Please consult with a reference archivist before using.]

**Box OV47**
Scrapbook 5, 1912, 1943-1963, 1972 and undated

The majority of the contents of this scrapbook are dedicated to the launching of the S.S. Merrick in honor of John Merrick on July 11, 1943. Also includes a specially-bound edition of the *Whetstone* edition honoring NCM's 50th anniversary, as well as various newspaper clippings relating to individuals and other entities connected to NCM. Other items laid in to the scrapbook are copies of a letter and photo from President John F. Kennedy, a 1946 *Whetstone* honoring John Merrick, and
Box 177

Scrapbook 6, 1936-1941

Scrapbook of newspaper clippings belonging to J.L. Wheeler, NCM Agency Director of the Southern Region.

Social Groups and Events Series, 1922-1992 and undated

(1 box)

Files relate to social clubs and events for North Carolina Mutual employees. The groups that are chronicled in these files include the NCM Glee Club and the Tuesday Morning Study Group, a self-improvement group composed chiefly of the wives of NCM administrators that met to read about and discuss political, social and cultural topics of the day. Materials on the latter make up the majority of these items.

Box 178

Greetings, Announcements, and Ads, 1924-1927

Tuesday Morning Study Club

Minutes, 1962-1977 (2 folders)

Correspondence and memorabilia, 1966-1977

Agendas and readings, 1973-1976

Meeting materials on club topic, "The Great Transition," 1977

[Audiovisual materials have been removed to the Recordings Series.]

Glee Club history and programs, 1922 and undated

"Hayti Lived Before" (stage play, circa 1992) and the June 28, 1952 issue of *The Nation*