



NATIONAL LEADERSHIP
Conference

October 14, 2025 | UVA Darden Sands Family Grounds Arlington, VA 22209

The Role of the Chapter in NAIFA's Membership Recruitment

By Chris Bor & Jarvis Ogden



What do you see as the role of your Chapter in recruiting members?

The Role of the Chapter in Membership Recruitment

The Chapter's role in membership recruitment is integral to our collective success. We, at the headquarters level, have put together a comprehensive plan and produced the tools and resources to fuel chapter-level support.

Here is what we need from you:

- 1) Work with your fellow Chapter Leaders to recruit and assemble a committee with at least 1 committee member for every 100 members in your Chapter.

The Role of the Chapter in Membership Recruitment

- 2) Ensure that new members are welcomed into your Chapter and connected with your benefits and operations on their behalf.
- 3) Recognize member milestones, achievements, and other opportunities to celebrate their development and differentiate them from the crowd.
- 4) Develop opportunities and make presentations to prospective members in agencies on why they should belong to NAIFA.
- 5) Identify agencies and firms who are good prospects for the 100% Agency or Financial Security Champion programs and refer them to HQ.

The Role of the Chapter in Membership Recruitment

- 6) Cultivate lists of prospective members and send them to the national membership team for development and recruitment.
- 7) Hold Membership Power Hours to conduct direct phone outreach to recover lapsed members and strengthen relations with members who are coming up on their renewal.
- 8) Identify industry, company, and other trade shows in our space and share those opportunities with the HQ membership team.
- 9) Connect and leverage HQ social media messaging to amplify our voice to members and prospective members.

Resources Designed to Support You

Membership Action Plan

The **NAIFA Membership Action Plan** is a strategic blueprint to strengthening the association's membership base by acquiring, onboarding, engaging, retaining, and reactivating members. With a target of at least **5% net membership growth annually**, this plan leverages a **flywheel model** to create sustainable momentum and ensure long-term success.



The NAIFA Membership Flywheel

1. Acquisition

- Implement inbound marketing techniques to attract financial professionals.
- Develop a **national database of prospective members**, categorized into qualified and unqualified leads for targeted outreach.
- Enhance NAIFA's **value proposition** by clearly defining membership benefits, reinforcing the core pillars of **Advocate, Educate, and Differentiate**.
- Launch three **membership marketing campaigns—Advocate Campaign, Differentiate Campaign, and Educate Campaign**—to drive awareness and engagement.
- Strengthen and streamline **individual, agency, and group membership programs** with benefits.
- Leverage **influencer networks** to extend reach and credibility.

2. Onboarding

- Ensure **at least 50%** of new members engage with onboarding efforts.
- Personalize welcome experiences with emails, **Brand Ambassador Team (BAT) outreach**, chapter engagement, and new member packets.
- Emphasize advocacy education to strengthen members' connection to NAIFA's mission.

3. Engagement

- Increase participation in key engagement programs by **10%** over the previous year.
- Enhance **Advisor Today Podcast** and **Young Advisor Team (YAT)** to connect with younger professionals.
- Recognize and motivate members through the **Triangle Team Program, Member Spotlights, and National Quality Awards**.
- Improve **digital communication** by tailoring content and optimizing the **Member Benefits website**.

4. Retention

- Achieve a **90%-member retention rate** by reinforcing the value of NAIFA membership.
- Streamline **renewal processes** and encourage proactive **chapter outreach** to members approaching renewal.
- Expand awareness of the **Find a Financial Professional tool** to increase member visibility and opportunities.

5. Reactivation

Target a **20% reactivation rate** of lapsed members.

Implement a structured **reactivation process** with improved tracking and outreach.

Utilize **Membership Power Hours** and **Win-Back Campaigns** to re-engage past members effectively.

Conclusion

This comprehensive membership strategy aims to drive sustainable growth through data-driven decision-making, targeted campaigns, and enhanced engagement efforts. By aligning NAIFA's collective efforts, the association will strengthen its advocacy, education, and industry impact while reinforcing its value to members.

Together, We Can Take on Anything!



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HOME

ABOUT ▾

MEMBERSHIP ▾

ADVOCACY ▾

EDUCATION ▾

MEDIA ▾

EVENTS ▾

CONSUMERS ▾

CONTACT



MEMBER LOGIN

THE VOICE OF FINANCIAL SERVICES

NAIFA is the one and only association of financial service professionals advocating at the state, interstate, and federal levels on behalf of their practices and the clients that they serve.

Why Join NAIFA?

Founded in 1890 and still protecting American financial professionals today, NAIFA members focus first and foremost on client care. Satisfaction comes from guiding families who are seeking financial wellness. A NAIFA member is a person who continuously strives to improve and gives back to the local community, what we refer to as Main Street USA.

NAIFA members are the closest to the consumer. Our membership is made up of all sorts of advisors who practice at the kitchen table, at local coffee shops, in board rooms, and in offices that bear their



<https://www.NAIFA.org/Join>



NAIFA IS THE ONLY FINANCIAL SERVICES ASSOCIATION:

- Founded over 135 years ago.
- Advocating for Main Street USA consumers.
- Representing the industry in all 50 states, Washington, DC, Guam, and Puerto Rico.
- Representing the entire insurance and financial services industry through its merger with Life Happens and the Society of Financial Service Professionals.

★★★★★ Financial Service Professionals ★★★★★

Monthly or annual fees are based on the number of years licensed as a financial service professional and grow with you as you progress in the profession. Choose a monthly or annual plan during the sign-up process.

\$20/month Licensed For One Year	\$30/month Licensed For Two Years	\$40/month Licensed For Three Years	\$50/month Licensed For Four Years	\$70/month* Licensed For Five Years+
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*plus \$2 processing fee per month

[Join Now](#)

★★★★★ Associate Members ★★★★★

Associate members receive many of the same benefits of membership, but are limited in the ability to hold certain leadership roles.

Industry Professional: This category is for individuals, partners, and vendors who sell services to financial service professionals. \$1,000/Year	Student: Enrolled in a high school, university, or college program seeking a diploma or degree and are not yet employed in financial services. \$50/Year
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[Join Now](#)

- Easy, scaled pricing structure designed to get early career practitioners access to the benefits of membership at a price point they can afford.
- Designed to grow with them as they progress and succeed in the industry, with NAIFA's help.
- Associate member categories for professionals and students who are in the industry but not licensed financial service professionals.
- Rates include membership, protection, and benefits at the national, state, and local level through our network of chapters and affiliates.

EXPLORE THE BENEFITS OF BELONGING

Advocate.

Representation

- NAIFA is the only association in our space that has representation in every state Capitol, Congress, the White House, and all relevant regulatory agencies. We directly advocate for the interests of our members and their clients in every arena to ensure the best possible outcomes for Main Street families and the financial professionals who work on their behalf.

Advocacy in Action Center

- View all of the important issues that NAIFA monitors at the federal and state levels. Only NAIFA members can utilize the "Take Action!" function on critical issues by lending your voice and contacting your legislators with the assistance of NAIFA.

Grassroots Training

- The Financial Security Advocate Academy provides participants with

Educate.

LUTCF

- The [Life Underwriter Training Council Fellow](#) is often considered the first certification any insurance professional should earn and has delivered value to more than 70,000 professionals since 1984.

The Journal of the Society of Financial Service Professionals

- The digital version of *The Journal of the Society of Financial Service Professionals* is delivered to members six times per year.
- A peer-reviewed publication that provides thought-leading content on the financial services profession.
- On-demand access to webinars and online content

NAIFA Live

- NAIFA's monthly membership meeting. Only NAIFA members can tune in each month for this webinar,

Differentiate.

Life Happens Content & Calendars

- NAIFA members receive access to a special bundle of co-branded content to use in your marketing & education efforts. Easy-to-follow content calendars and digital content make it easy to post, distribute, and promote your firm while raising awareness and opening up conversations with prospects and clients.

Online Consumer Directory

- Only NAIFA members are listed in our consumer directory on [Life Happens' financial professional directory](#).

Market Yourself

- NAIFA offers members opportunities to market themselves by contributing content to our blog for consumers or any one of our Centers of Excellence. Prefer to take the stage? Apply to the NAIFA's Speakers Bureau. Members will receive preferred consideration.

Familiarize yourself with as many of the key benefits of membership that drive value.

This is just a small number of examples of key value propositions that shows how NAIFA advocates, educates, and differentiates our members.

Develop personal examples of how you have benefitted from membership. Make it personal!

MEMBERSHIP CHAIRS

BECAUSE MEMBERSHIP MATTERS!

Greetings Chapter Membership Chairs!

Thank you so much for taking on this critical role in your Chapter! Your commitment to growing and engaging our membership is truly invaluable and does not go unnoticed.

As the Membership Chair, you play a vital role in the success of your Chapter. Your efforts in recruiting new members, retaining current ones, and fostering a welcoming and inclusive environment help strengthen our community and ensure our continued growth. Through your enthusiasm, strategic initiatives, and unwavering support, you have helped make our Chapters a place where members feel valued, connected, and inspired to contribute.



Your ability to engage with potential and existing members, create meaningful connections, and promote the benefits of membership has significantly impacted your Chapter's strength and vibrancy. Whether it is through outreach, communication, or organizing engaging events, your dedication helps build a strong foundation for our organization's future.

On behalf of NAIFA, we want to express our deepest appreciation for your efforts. Your hard work and passion truly make a difference, and we are incredibly grateful for your contributions. Thank you for your time, energy, and dedication to ensuring that your Chapter continues to thrive.

With Sincere Appreciation,

Adam Sachs & Roger Sims
NAIFA Membership Co-Chairs

QUICK LINKS

[Membership Action Plan - Summary](#)

[Membership Action Plan - Full](#)

[Building A Successful Membership Program Webinar](#)

[Boosting NAIFA's Message: Social Media Resources](#)

[Membership Join Page](#)

[Quick Renewal Page](#)

[Membership Power Hours](#)

[Membership Benefits](#)

[Membership Sell Sheets](#)

[Membership Scripts/Templates](#)

[Membership Referrals](#)

[Membership Presentations](#)

[Activity Tracker for Presentations](#)

[Membership Chair Job Description](#)

[100% Agency Overview Sell Sheet](#)

[Financial Security Champion Overview Sell Sheet](#)

[Membership Renewal Action Plan](#)

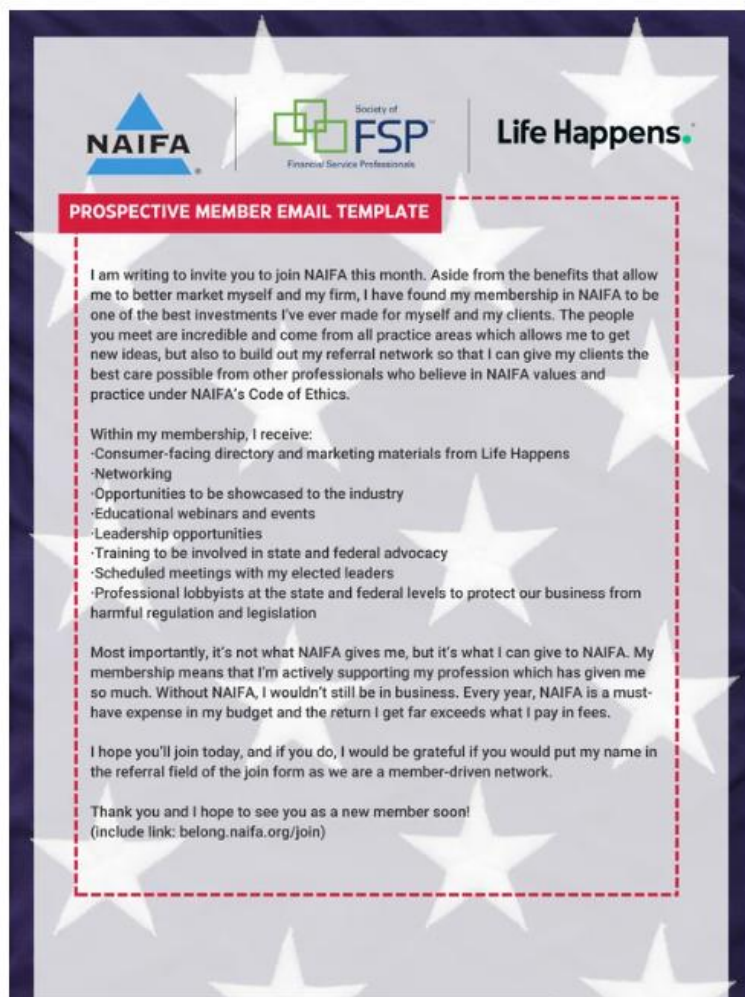
[New York Life Corporate](#)

[Membership Application](#)

- Leverage all the resources designed to make your job easy, conveniently located at:
<https://leaders.naifa.org/membership>

Email Template: Prospective Members

Copy and paste this template into an email to your prospective members! Feel free to edit to make it your own or talk about things happening in your chapter.



Email Template: Former Members

Copy and paste this template into an email to your former members! Feel free to edit to make it your own or talk about things happening in your chapter.



- Email Templates
- Phone Scripts
- Draft Text Messages
- Job Descriptions
- Sell Sheets
- Presentations
- And more...

ADVOCATE. EDUCATE. DIFFERENTIATE.

Kathleen Owings, LACP
Colorado Springs, CO
2024 National Young Advisor of The Year
Loyal Member Since 2011

BELONG TO THE ONE & ONLY NAIFA Your Professional Association

Belonging to your professional association establishes you as an individual who is committed to your career as a financial services professional. Through your membership, you will join a national network of performance-driven professionals who proudly adhere to a Code of Ethics, proudly engage in the democratic process to protect their businesses, and continuously seek self-development opportunities through education and servant leadership programs.

NAIFA's Fees Align with the Acceleration of Your Career

Year 1	Year 2	Year 3	Year 4	Year 5
\$20/month	\$30/month	\$40/month	\$50/month	\$70/month

plus \$2 processing fee

We understand that the first few years of establishing your practice are challenging. That's why NAIFA provides graduated membership fees so you don't have to wait to join your professional association until you're established. To help you succeed, NAIFA has accelerator programs for young advisors, to propel you throughout the lifecycle of your career, and support you through our advocacy & education programs that span practice areas and demographics. NAIFA is a multi-generational association that includes everyone who is invested in the financial security of Americans and chooses to belong.

In addition to membership categories for those practicing in regulated professions, NAIFA also offers membership categories for the following financial security professionals:

Industry Professional	Student
\$1000/year	\$50/year

* Contact us to learn more about group memberships with additional benefits for your firm or agency.

QUICK FACTS:

Founded in 1890, NAIFA is the largest & oldest association for financial service professionals.

NAIFA promotes you & your brand through online directories, profiles, speaking and volunteer leadership opportunities.

NAIFA provides you with training & opportunities to meet with elected leaders so you can have a part in directly shaping policy.

Gain access to educational webinars, meeting invites, obtain CE credit, & special interest practice communities.

Includes a membership benefit bundle to access to Life Happens content, and other benefits that help you save and make more money!

National network of over 20,000 multi-disciplinary professionals united by their commitment to clients, community, and country.

NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS
1000 Wilson Blvd, Suite 1890, Arlington, VA 22209
Phone: 877-866-2432
Email: recruitment@naifa.org

www.naifa.org/join



Membership Sales Sheets

Can be
customized with
someone from
your chapter on
request.

Advocate.

Since 1890, NAIFA is the only professional association that advocates at the state, interstate, and federal levels on behalf of financial services professionals.

- **Grassroots Training:** Earn your Financial Security Advocate badge to showcase to your clients that you advocate on their behalf.
- **Legislative Action Center:** Learn about the bills that NAIFA is monitoring and access tools and resources for contacting your legislators.
- **Congressional Conference:** NAIFA members come together for the industry's largest fly-in to advocate on behalf of their businesses, clients, consumers, and the industry in May of every year. Showcase pictures of you meeting your Congressional leaders and Capitol Hill photo to explain what you are doing for their financial futures.
- **GovTalk:** A monthly newsletter that summarizes the latest activity on Capitol Hill and other legislative activities impacting the industry so you can stay updated.
- **Action Alerts:** NAIFA sends alerts to members when there is an opportunity to inform their legislator about a particular issue.
- **Advocacy in Action Blog:** Stay current on the latest legislative action in our industry.
- **IFAPAC:** NAIFA has a political action committee within every state and at the federal level.

Educate.

Invest in your education and build your network with NAIFA so you can reach your potential and guide your clients to financial security. NAIFA provides opportunities for you to elevate your knowledge, confidence, skills, and productivity.

- **NAIFA Live:** NAIFA's monthly meeting featuring top industry speakers giving sales & marketing ideas.
- **LUTCF Designation:** Learn how to sell & market successfully. NAIFA has revamped its popular designation to now include field mentorship.
- **FSP Institute:** Immersive event to allow financial service professionals to come and learn from subject matter experts from a cross-disciplinary viewpoint.
- **Leadership in Life Institute (LILI):** LILI is a 6-month leadership development program devoted to advancing your personal growth and professional success.
- **NAIFA Centers of Excellence:** Specialized communities to meet the vast needs of our membership. Each Center offers webinars, blog articles, case studies, research, and access to subject matter experts:
 - Lifetime Healthcare Center for long-term care, Medicare, caregiving, longevity & more.
 - Business Performance Center for practice management, fintech & more.
 - Investments, Retirement, Estate & Advanced Planning Center for retirement, social security, executive benefits, & more.

Differentiate.

NAIFA provides members with ample opportunities to stand out from the crowd. Whether through volunteer leadership, as a thought leader by contributing content, gaining visibility by earning an award, or being involved in one of our specialty groups.

- **NAIFA Quality Awards:** Receive recognition for quality of client care in the following categories: Life Insurance, Multi-Line, Financial Advising, and Health & Employee Benefits.
- **Advisor Today:** NAIFA's lifestyle brand with the tagline "Live + Work + Give" provides content through the AT Blog, podcast, and award programs to highlight the work of members.
- **Coaching & Training:** NAIFA members offer each other free sales & motivation coaching programs and study groups.
- **Sales Directory Listing:** Only NAIFA members are listed in Find A Financial Professional, the consumer-facing directory on NAIFA's consumer site, lifehappens.org.
- **Access to Life Happens Content:** NAIFA members receive curated content to award-winning Life Happens content.
- **Interest Area Collectives:** NAIFA provides study and legislative working groups in specific practice areas, for new advisors, managers, and other demographics, creating additional support and networking.



Program Benefits

The 100% Agency program is designed to be a win-win for agencies and their advisors. Offering all of the traditional benefits of NAIFA membership with the exclusive recognition of being a 100% Agency.

Preferred Pricing on Fees*

Group memberships receive preferred pricing, but full benefits. Flexible payment options make it easy for you to decide how you want your agency to participate in payment.

Special Programs

Explore all that NAIFA has to offer through onboarding and our ongoing program to bring best practices to 100% Agency participants.

Agency Profiled in *Advisor Today* blog

Let your talent shine on a national stage as we feature your agency in our blog with a distribution of more than 80,000.

Special Logo & Welcome Kit

Show your clients that your agency is 100% American and 100% supportive of their financial security.

Logo Placement

Get recognized with your agency logo on NAIFA's site (belong.naifa.org/groups) and within the NAIFA Members' portal.

Agency Insurance Offers

Receive access to CalSureance Agency E&O insurance and other group insurance products to help you provide benefits to your agency professionals.

Organization Offers

Receive discounts to professional development events, NAIFA Quality Awards, LUTCF, LACP, and more.

Preferred Subject Matter Experts

Your advisors will be in a preferred pool of contacts for commentary, participation, writing and speaking opportunities offered by NAIFA.

* Minimums apply for preferred pricing.

100% Agency Program

ABOUT THE 100% Agency Program

The 100% Agency Program was developed to acknowledge insurance agencies for their commitment to NAIFA by allowing them to participate in NAIFA in a group and individual setting that fits the unique culture of an insurance agency. Agencies in the program receive special recognition for their involvement while also allowing NAIFA to increase its advocacy presence on both federal and state levels.

Quick Facts:

- Demonstrate your commitment to NAIFA by agreeing that 100% of your producers and office staff will be members and receive exclusive pricing and benefits.
- Convenient all-in-one group billing.
- All members receive all the rights, benefits, and privileges of membership in NAIFA.

The Value to You:

- Preferred pricing
- Agency gains recognition through promotion on the website, and the agency is profiled in *Advisor Today*
- Advisors are rewarded for participation through publicity and agency receives extra recognition

Create a culture of excellence.

An agency manager or owner that commits to the 100% Agency program sets the bar high for producers and administrative professionals that support them. It sets a standard of excellence whereby the advisors understand that participating, continuous learning, and advocating on behalf of consumers is not just good for their business—but it's the right thing to do for their clients. Participation also highlights the agency manager or owner as a true leader in the industry.

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Lawrence Holzberg,
LUTCF, LACP
Brynthon, FL
LOYAL MEMBER SINCE 1990



HOW THE PROGRAM WORKS

1. Contact our Membership Sales Team to schedule a program discussion.
2. Sign a membership agreement outlining marketing and membership terms.
3. Reconcile any current members to enter into group membership.
4. Onboard your agency through a kick-off call, press release, welcome kit, and professional agency profile.

Learn More

Contact NAIFA's Membership team at recruitment@naifa.org.





ABOUT THE Financial Security Champion Program

The Financial Security Champion Program was developed to acknowledge organizations for their commitment to NAIFA by allowing individuals to join as a group. Groups that participate in the program receive special recognition for their involvement, special benefits, and are eligible to participate in working groups that help to advance their business.



Dan Peterson, LUTCF,
LLUF, FIC
Plym, North Dakota
Loyal Member Since 1992

Create a culture of excellence.

We chose to invest in NAIFA for our producers because we believe in putting our clients' best interests first which is what the NAIFA Code of Ethics states. Our producers that are members of NAIFA are committed to their clients, community, and the industry and get involved in grassroots advocacy to be the voice of their clients to legislators. We are extremely proud to support our advisors in belonging to their professional association."

Quick Facts:

- Decide on a membership package that works for you and can include a combination of member types to best suit your needs.
- Convenient all-in-one group billing.
- All members receive the rights, benefits, and privileges of membership in NAIFA.

The Value to You:

- Organization gains recognition through promotion on the website, Advisor Today digital platform, and more.
- Advisors are rewarded for participation through publicity and the organization receives extra recognition & preferred rates.

NAIFA
1000 Wilson Blvd., Suite 1890
Arlington, VA 22209
recruitment@naifa.org



Financial Security Champion Program

Program Benefits

NAIFA's Financial Security Champions program is designed to be a win-win for organizations and their teams. Offering all of the traditional benefits of NAIFA membership with the exclusive recognition of being a Financial Security Champion in your market through aligning your firm with the oldest and most revered association in the industry.

Flexible Group Plans

Decide who should be part of the Financial Security Champion package with convenient group billing.

Onboarding & Advocacy Training Sessions

Explore all that NAIFA has to offer with a special onboarding session and special advocacy training session exclusively for your team.

Organization Profiled in Advisor Today blog

Let your talent shine on a national stage as we feature your organization in our blog with a distribution of more than 80,000. Once a year, your logo will be recognized in NAIFA's magazine.

Special Logo & Welcome Kit

Show your clients that your organization invests in their financial services professionals & adheres to the highest level of care.

Logo Placement

Get recognized with your organization's logo on NAIFA's site (belong.naifa.org/groups) and within the NAIFA Members' portal.

Organization Offers

Receive discounts on group submission of NAIFA Quality Awards, along with the opportunity to submit your professionals for awards and engage in leadership activities.

Concierge-Level Service

Your organization will receive a key contact at NAIFA through which you can organize your membership activities.

National, State & Local Membership

Your membership for your financial services professionals includes access to events at all three levels of NAIFA.

Preferred Subject Matter Experts

Your organization will be in a preferred pool of contacts for commentary, participation, writing and speaking opportunities offered by NAIFA, and will be the first group tapped when media calls looking for subject matter experts.

HOW THE PROGRAM WORKS

1. Contact the Membership Sales Team to design a package to meet your organization's goals and choose the structure of your membership package.
2. Sign a membership agreement outlining service and membership terms
3. Reconcile any current members to enter into the group membership plan
4. Organization onboarding includes a kick-off call, press release, & special welcome kit that includes Financial Security Champion logo swag so that you can proudly display in your office.

Learn More

Contact NAIFA's Membership staff at recruitment@naifa.org.

recruitment@naifa.org





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<https://www.naifa.org/educate>

Educate Campaign

- Timeline: October 15th – December 31st
- Audience: Members and Prospective Members
- Assets: Landing Page, Emails, Social Media, Blog Posts, and Video
- Hashtags: #NAIFAProud #EducateToElevate
- CTAs: 1) Join, 2) Life Happens Value, 3) Webinars, or 4) Subscribe to the *Advisor Today* Blog.

Social Media Engagement



WE CAN DO OUR PART TO HELP GIVE OUR MESSAGING A BIG BOOST

For each of our social media platforms, there are a set of actions you can take to help, found directly below each post. See below for a guide to ways that you can engage with NAIFA social content.

LINKEDIN FROM LEFT TO RIGHT



Like – Click or tap this button to "Like" a post. The more Likes a post has, the greater the chance that LinkedIn will show that same post to others who view similar content. This can lead to more prospects and members!

Comment – Click or tap this button to leave a comment on a post. Comments inform LinkedIn that this post has industry relevance and should be presented to the homepage feeds other individual and company profiles. You can also click or tap directly into the comment box to perform the same action.

Repost – Click or tap this button to repost a post to your homepage.

Repost with your thoughts
Create a new post with NAIFA's post attached

OR Repost
Instantly bring NAIFA's post to others' feeds

You can either create a new post with your own thoughts

you can simply repost the the same post without adding a new thought



WE CAN DO OUR PART TO HELP GIVE OUR MESSAGING A BIG BOOST

For each of our social media platforms, there are a set of actions you can take to help, found directly below each post. See below for a guide to ways that you can engage with NAIFA social content.

FACEBOOK FROM LEFT TO RIGHT



Like – Click or tap this button to "Like" a post. The same principal applies, so the more Likes, the better!

Comment – Commenting on a post on Facebook helps it to go "viral", meaning if a NAIFA post gets enough comments, it will be shown to millions of people who view similar content.

Send – Click or tap this button if you want to directly send a post to a specific destination, such as a person's email or text messages.

Share – Click or tap this button to share a post from your homepage on Facebook. This functions similar to LinkedIn's repost feature.

Say something about this...

Share now

You can either leave a comment and repost. OR you can simply repost the same post without adding a comment of your own

If you have any questions or input for interacting with NAIFA social content, feel free to reach out to Javis Ogden, Membership Sales Manager, at jogden@naifa.org.

Social Media Engagement



WE CAN DO OUR PART TO HELP GIVE OUR MESSAGING A BIG BOOST

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INSTAGRAM FROM LEFT TO RIGHT

85 16

Like – Click or tap this button to "Like" an Instagram post. Remember to always hit those likes!

Comment – Click or tap this button to leave a comment on an Instagram post. Facebook and Instagram are run on the same system, so comments can go a long towards getting NAIFA content in front of more people so they can learn who we are.

Share – Click or tap this button if you want to directly send a post to a specific destination, such as a person's email or text messages, or if you want to share it to your Facebook page!

If you have any questions or input for interacting with NAIFA social content, feel free to reach out to Jarvis Ogden, Membership Sales Manager, at jogden@naifa.org.



WE CAN DO OUR PART TO HELP GIVE OUR MESSAGING A BIG BOOST

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TWITTER/X FROM LEFT TO RIGHT

1 1 63

Comment – Click or tap this button to leave a comment on a Twitter post. Let's go viral!

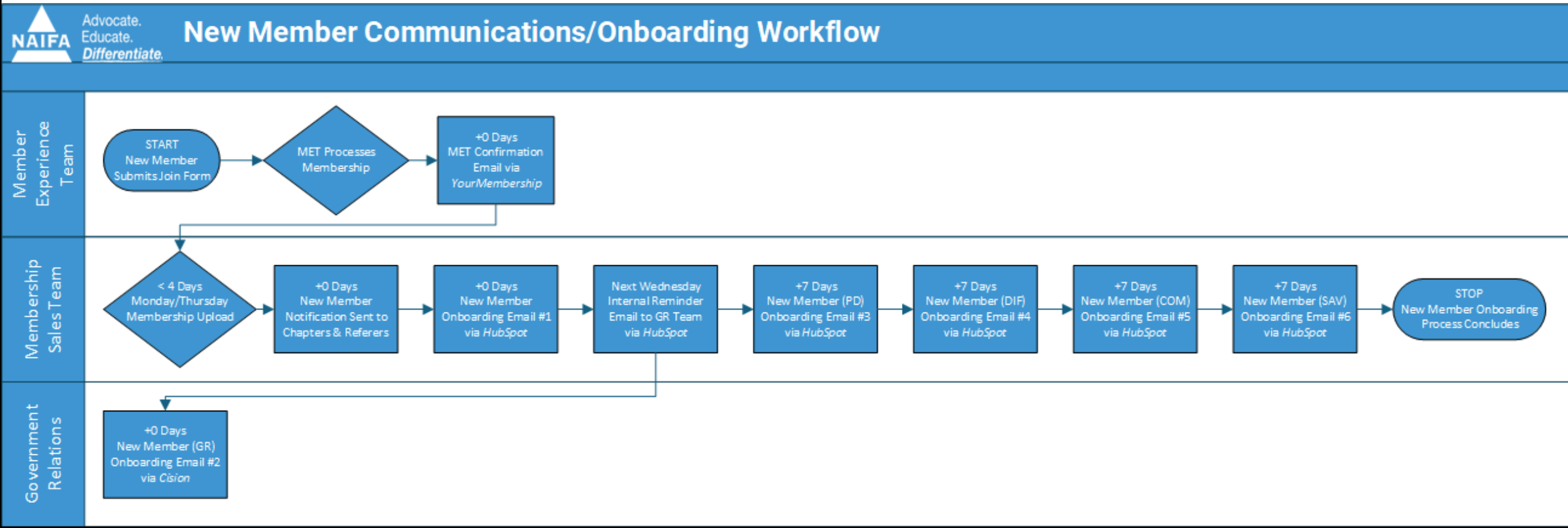
Retweet – Click or tap this button to repost a Twitter/X post to your own feed. Think of this as Twitter/X's version of reposting.

Like – Click or tap this button to "Like" a post on Twitter/X.

If you have any questions or input for interacting with NAIFA social content, feel free to reach out to Jarvis Ogden, Membership Sales Manager, at jogden@naifa.org.

New Onboarding Email Sequence

- Crafted with Member Feedback and Input
- Simplifies and Drips Information over 6+ Weeks





Welcome to the Community That Cares

ADVOCATE EDUCATE DIFFERENTIATE

We're thrilled you've committed to NAIFA!

Welcome,
You're now part of a powerful network of financial professionals who are passionate about serving clients and supporting one another. Your membership unlocks access to advocacy, education, and a community that truly has your back.

Here's What to Expect Next:

- Your official welcome email will arrive shortly. It's the first in a 6-part series designed to help you make the most of your NAIFA experience.
- Your NAIFA Welcome Kit will arrive by U.S. Mail within 4 weeks.
- Ongoing updates and opportunities will come from membership@naifa.org.

Add membership@naifa.org to your safe senders list so you don't miss out.

As a new NAIFA member, you have 60 days to enroll in Long-Term and Short-Term Disability plans with no medical underwriting.
Pre-existing condition limitations do apply for the first 24 months of coverage.

Ready to Get Started?

Visit the [NAIFA Member Portal](#) to update your profile and personalize your experience. Be sure to get signed in before the New Member Orientation (link coming soon!) so you can make the most of your time and get the full benefit of everything the portal has to offer.

Your username is your email address. Your temporary password is: Naifa1234
Need to reset your password? Just follow the prompt on the sign-in page or give us a call.

Want to start connecting right away?
You don't have to wait! Visit the [member directory](#) to find and connect with NAIFA members across the country—your new professional community is just a click away.

Once again, welcome to NAIFA — we're so glad you're here and can't wait to help you grow!

Questions?

Our Member Experience Team is ready to help at 877-866-2432 or email us anytime at info@naifa.org.



This email was sent to you from NAIFA.
If you wish to stop receiving email from us, you can simply remove yourself by [visiting this subscription page](#).

National Association of Insurance and Financial Advisors
1000 Wilson Boulevard, Suite 1890
Arlington, VA 22209



Welcome to NAIFA New Member Orientation

ADVOCATE EDUCATE DIFFERENTIATE

1 New Member Orientation 2 Power of Advocacy 3 Professional Development 4 Differentiate 5 NAIFA Community 6 Member Benefits

We're So Excited You're Here!

Welcome to NAIFA! You're now part of a powerful, nationwide community in the oldest and most respected association for financial professionals, where success is built on connection. Your membership opens the door to an network of peers who share your values, understand your journey, and are here to help you grow personally and professionally.

Over the next few weeks, you'll learn how NAIFA's three pillars — Advocacy, Education, and Differentiation — are designed to accelerate your professional growth. Each email will guide you through key ways to make the most of your membership.

Get Started with New Member Orientation

- Live Orientation: Join us next Mondays at 2:00 PM ET for a guided walkthrough of NAIFA's top resources and tips for connecting with fellow new members.



Register for Orientation

- On-Demand Orientation: Can't make the live call? Watch at your convenience. [VIEW THE ARCHIVE](#)

Your NAIFA membership opens doors for:

1. **Advocacy** — Defend your profession through NAIFA's strong legislative voice
2. **Education** — Gain access to differentiated systems that grow your business
3. **Differentiation** — Stand out with NAIFA's designations, awards, and recognition
4. **Local Engagement** — Collaborate with professionals in your area
5. **Member Benefits** — Unlock health, insurance, and insurance plans to enhance your practice

2

Next Up: In your next email, we'll show you how NAIFA's advocacy protects your clients — and your business — every day.

Questions?

Our Member Experience Team is ready to help at 877-866-2432 or email us anytime info@naifa.org.

NAIFA | 1000 Wilson Boulevard | Suite 1890 | Arlington VA 22209 | USA



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Welcome to NAIFA The Power of Advocacy

ADVOCATE

1 New Member Orientation 2 Power of Advocacy 3 Professional Development 4 Differentiate 5 NAIFA Community 6 Member Benefits

While You Serve Clients, NAIFA's Advocacy Has Your Back

Investment in advocacy early in your career helps shape the policy and regulations that impact how you do business every day. NAIFA's premier grassroots operations Capitol Hill and every state capital as well as our timely political action committees (PAC) help grow your business.

NAIFA is your voice — advocating to protect your career, your clients, and your future. You can make an impact while having fun to be the voice of your clients and our profession.

Watch the short video below to see how NAIFA's advocacy works for you



What's in it for me?

- Added the most powerful advocacy network in financial services
- Protected by NAIFA's PAC, your industry leading federal political action committee (PAC) at 50 state PACs
- Advanced favorable industry public policy at the federal, interstate and state levels
- Connected to our members army with members in every State House and all 435 US Congressional districts

What to get involved:

- **Advocacy Training:** Proven Success Training Via The Financial Services Advocacy Academy
- Attend Congressional Committee Hearings/Staffers/Exec. Advocacy Events
- Attend State Legislative Days Meet with Legislators at State Capital
- Participate in NAIFA's On-Site Capitol Hill with Federal Legislators during August Session
- Become an IFPAC Volunteer: Attend campaigns covers with lawmakers and educates them on the issues important to your Main Street business and clients.

How do I defend the status?

Every NAIFA member benefits from the advocacy made possible through IFPAC, whether it's protecting advanced retirement plans, preserving client assets to affordable insurance, or defending our ability to serve as trusted advisors. Your contribution to IFPAC is an investment in the future of our profession and the financial security of the millions of Americans we serve.

Take Action Today! Start Your Advocacy Journey

Visit NAIFA's Advocacy Action Center (AAC) to learn more about your leadership at the federal & state levels, participate in Action Alerts on key issues and make contributions to IFPAC. Your voice matters — and NAIFA helps amplify it and ensure your profession remains a pillar of stability for clients navigating an ever-changing legislative landscape.

Advocacy Action Center

As a new member, we are connecting you with your state advocacy associates and IFPAC chairs to welcomed you with advocacy members.

State IFPAC Chair —

State IFPAC Chair —

State IFPAC Chair —

State IFPAC Chair —

Please feel free to contact them or email with any advocacy questions.

3

Your next email will introduce you to professional development programs that drive real career growth.

Missed Orientation, Register Here

Questions?

Our Member Experience Team is ready to help at 877-866-2432 or email us anytime info@naifa.org.

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Welcome to NAIFA Elevate Your Expertise

PROFESSIONAL DEVELOPMENT

1 New Member Orientation 2 Power of Advocacy 3 Professional Development 4 Differentiate 5 NAIFA Community 6 Member Benefits

Proven Learning. Measurable Growth.

NAIFA is here to help you sharpen your skills, stay relevant, and grow your business with real-world strategies from advisors who've been there.

What's in it for me?

- Access to top training, thought leadership, and guest-led techniques
- Gain new referrals
- Increased case size
- Grow at home or on location

Top Resources You Can Use Now:

- [NAIFA Live & Webinars](#)
- [Journal of Financial Services Professionals](#)
- [Advisor Today Podcast Series](#)

Specialized Learning from Our Centers of Excellence:

- [Lifetime Wealth](#)
- [Business Performance](#)
- [Investments, Retirement, Estate and Advanced Planning](#)

More Ways to Learn:

- [FSP Institute: Advanced Education](#)
- [WATTS Designation Program](#)
- [LIFE Leadership in Life Institute](#)

Watch this short video to explore how NAIFA education drives real success.



MEMBER EDUCATION

NAIFA helps you stay ahead — every step of the way.

4

Your next email will show you how to stand out with NAIFA's marketing and branding tools.

[MISSED ORIENTATION, REGISTER HERE](#)

Questions?

Our Member Experience Team is ready to help at 877-866-2432 or email us anytime info@naifa.org.

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Welcome to NAIFA Differentiate

DIFFERENTIATE



Stand out, Get Noticed

In a crowded market, NAIFA helps you rise above—so your expert knowledge gets noticed and your business grows.

What's in it for me?

- Visibility
- Credibility
- Marketing Tools

Top Tools to Elevate Your Brand:

- NAIFA Social Assets
- Address Tool
- Real Estate Professional Directory
- Life Insurance Application Checklist (login required)
- Member Spotlight

Watch this short video to see how NAIFA helps you get noticed and win more clients.



CONNECT NOW

Your expert knowledge is to be seen — and NAIFA is here to help make it happen.

5

Your next email will introduce you to local chapter engagement—where all of NAIFA's benefits come to life through real relationships.

[MISSED ORIENTATION, REGISTER HERE](#)

Questions?

Our Member Experience Team is ready to help at 877.986.2422 or email us anytime info@naifa.org.

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Welcome to NAIFA Your NAIFA Community

ADVOCATE EDUCATE DIFFERENTIATE



Real Relationships. Real Results.

You've seen how NAIFA empowers your career through advocacy, education, and tools to stand out. Now it's time to make it personal—through your local chapter.

What's in it for me?

- Build Relationships
- Advocacy in Action
- Peer-Powered Education
- Stand Out Locally

Why It Matters:

- Referrals and partnerships grow through chapter connections
- Local involvement drives long-term success and retention
- Your best ideas and clients may come from across the room

Watch this short video to see how local NAIFA is enhancing the benefits to life.



FIND YOUR CHAPTER

The most successful advisors don't go it alone.
Let NAIFA's community support you—locally and nationally.

6

Your next email will show you how to unlock even more value from your membership through exclusive member discounts and partner programs.

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Questions?

Our Member Experience Team is ready to help at 877.986.2422 or email us anytime info@naifa.org.

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Welcome to NAIFA Exclusive Savings

ADVOCATE EDUCATE DIFFERENTIATE



Exclusive Plans Just for You

As a new NAIFA member, you're now connected to a powerful network of professionals who advocate for our industry and each other. Don't miss out on one of your exclusive member perks: access to ten different group plans tailored for financial professionals. From insurance to business services, these offerings are designed to support your work and protect what matters most.

- E&O Insurance
- Long-Term and Short-Term Disability*
- Health Care
- Dental
- Vision
- Cybersecurity
- Business Overhead Expense
- Home & Auto
- Term Life and AD&D

*Limited offer to new NAIFA members to enroll in the Long-Term Disability & Short-Term Disability plans with no medical underwriting during your eligibility period. Your eligibility period is within the first 60 days from your membership date. The preexisting limitation will apply during your first 24 months of coverage.

EXPLORE PLANS

Click here to view NAIFA's listing of selected partners who can provide financial advisors and insurance agents access to products and services to enhance their businesses and promote top line growth.

We're glad you're here. And this is just the beginning.

[MISSED ORIENTATION, REGISTER HERE](#)

Questions?

Our Member Experience Team is ready to help at 877.986.2422 or email us anytime info@naifa.org.

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Membership Care Calls Spreadsheets

- Remember to utilize your Membership Care Call Spreadsheets!
- Spreadsheets located at: <http://leaders.naifa.org/membership-state>
- This convenient link can be bookmarked to make calls every month and the sheet is maintained by our staff for you.

B	C	D	E	F	G	H	I	J	K	L
Contact	Date Last Contacted	Status	First_Name	Nickname	Last_Name	State_Chapter	Local_chapter	Local_Affiliate	Member_PREFERRED_Phone	Email_Address
Lapse Apr: Sherrie left vm	Emailed 5-1-25	2-Lapsed	Mark	Mark	Thomas	Pennsylvania	None	PA-Greater Philadelphia	215-293-1223	mark.thomas@aon.com
Lapse Apr: Tracy Im 2/20, Tracy Im 12/12	Emailed 5-1-25 Emailed 12-12-24	2-Lapsed	Hampton	Hap	Durbin	Pennsylvania	None	PA-South Central	814-931-1483	hap@durbincompanies.com
Lapse Apr: Sherrie left vm	Emailed 5-1-25	2-Lapsed	Robert	Randall	Swank	Pennsylvania	None	PA-Northeast	570-654-1500	robert.swank@prudential.com
Lapse Apr: Tracy 2/20: spoke to sec. she was very cryptic and said he was out of state and best way to reach him is email.	Emailed 5-1-25	2-Lapsed	Roger	Roger	Zahn	Pennsylvania	None	PA-Southwest	412-837-4295	zahn.roger@principal.com
Lapse Apr: Jim, Left a vm for Marc, please email him Scott: 12/12/24-not available. LM with front desk.	Emailed 5-1-25	2-Lapsed	Steven	Steven	Seide	Pennsylvania	None	PA-Greater Philadelphia	610-280-9330	sms@seidefinancial.com
Lapse Apr: Sherrie left vm	Emailed 5-1-25 Emailed 12-12-24	2-Lapsed	Marc	Marc	Hembrough	Pennsylvania	None	PA-Greater Philadelphia	484-328-3590	marc@whartonbusinessgroup
Lapse Apr: Bronwyn 2/20 said best to reach by email. sent email	Emailed 5-1-25	2-Lapsed	Thomas	Thomas	Vickers	Pennsylvania	None	PA-Greater Philadelphia	610-627-5566	tvickers@fpawealthgmt.com
Lapse Apr: Sherrie left vm	Emailed 5-1-25	2-Lapsed	Douglas	Douglas	Dillmuth	Pennsylvania	None	PA-Northeast	570-296-8591	doug.dillmuth.bvj9@statefarm
Lapse Apr: Jim-2/20/25 Spoke with Lisa admin and she asked if we could email Frank renewal link, follow-up next month	Emailed 5-1-25	2-Lapsed	David	Dave	Fazzini	Pennsylvania	None	PA-Greater Philadelphia	610-917-9600	dfazzini@premierplanning.net
Lapse Apr: Tracy Im 2/20, Tracy Im 12/12	Emailed 5-1-25 Emailed 12-12-24	2-Lapsed	Francis	Frank	Hennessey	Pennsylvania	None	PA-Southeast	610-917-9600	fhennessy@premierplanning
Lapse Apr: Tracy 2/20: left vm	Emailed 5-1-25	2-Lapsed	Brendan		Schuck	Pennsylvania	None	PA-Greater Philadelphia	215-317-4729	brendanschuck@allstate.com
Lapse Apr: Trish 2/13/25-texted; Bronwyn calling 5/1/25-left V/M; follow up email 5/1/25 & text	Emailed 5-1-25	2-Lapsed	Shawn		Stout	Pennsylvania	None	PA-North Central	888-466-3060	Shawn.Stout@usallifecompany
		2-Lapsed	IndustryProf	Jamie	Hopkins	Pennsylvania	None	PA-Greater Philadelphia	443-831-6349	president@finservfoundation.c



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OPERATION MEMBERSHIP



Key Meetings for Membership Chairs

Membership Monday Calls

- Each Monday at 4:00 PM Eastern, we conduct a 15-minute call on new member production, creating accountability for weekly and monthly goals. We also feature a membership success story and share key updates and answer questions.

Quarterly Membership Calls

- A wrap-up of production for the past quarter, combined with a deep dive on efforts and strategies for the coming months.

Cohort Calls

- Bi-monthly calls with peer Chapters, Chapter Services Team, and Associate Vice Chairs to support your efforts.

NAIFA Membership Committee

Committee Co-Chairs

- Member Acquisition - **Adam Sachs** | asachs@centinelsg.com | 617-797-4536
- Member Retention - **Roger Sims** | rdsims@ft.newyorklife.com | 336-254-1153

Member Acquisition Vice Chairs

- **Brad Kadelski** | brad@brookfieldpartners.com | 508-868-6765
Vice Chair of Membership Sales
 - Company Sales/Ledger Deduct/Agency Presentations
 - Group Sales (100% Agency/Financial Security Champion)
 - Individual Sales
 - Influencer Network
 - Lead Generation, Referrals, and Testimonials

NAIFA Membership Committee

Member Acquisition Vice Chairs

- **Chris Bor** | cbor23@yahoo.com | 925-348-4241
Vice Chair of Chapters Sales & Distribution
- **Mimie Yoon Lee** | myoonlee11@gmail.com | 925-235-9380 - Peter Browne Cohort
Arizona, California, Florida, Georgia, Illinois, Massachusetts, Michigan, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Tennessee, Texas, Virginia, and Washington
- **Jennifer Hodges** | jennifer@goclarity.com | 417-840-0465 - Juli McNeely Cohort
Alabama, Arkansas, Colorado, Connecticut, Indiana, Iowa, Kentucky, Louisiana, Maryland, Minnesota, Missouri, Nevada, Oklahoma, Oregon, Puerto Rico, South Carolina, Utah, and Wisconsin
- **Steve Walker** | swalker@e4.insurance | 763-229-7507 - Jeff Taggart Cohort
Alaska, Delaware, District of Columbia, Hawaii, Idaho, Kansas, Maine, Mississippi, Montana, Nebraska, New Hampshire, New Mexico, North Dakota, Rhode Island, South Dakota, Vermont, West Virginia, and Wyoming
- **Scott Blake** | scott.blake@nm.com | 561-452-2841 - John Newton Russell Cohort
Austin, Central Florida, Central Iowa, Chicagoland, Cincinnati, Cleveland, Columbus, Dallas, Eastern Iowa, Fort Worth, Greater Foothills, Heartland, Houston, Louisville, Los Angeles, Memphis, Northeast Florida, Northern Virginia, Pineywoods of East Texas, Richmond, San Francisco Peninsula, Silicon Valley, Tampa Bay, Tidewater, Upstate South Carolina, and Wichita

NAIFA Membership Committee

Member Retention Vice Chairs

- **Paul Szkotak** | pmszkotak@ft.newyorklife.com | 609-332-7007
Vice Chair of Onboarding, Retention, and Reactivation
 - Onboarding Strategies
 - Brand Ambassador Team (BAT)
 - Group Membership Retention
 - Individual Membership Retention
 - Referral Recognition
 - Reactivation & Win-Back Strategies
- **Brian Haney** | bhaney@thehaneycompany.com | 240-888-8630
Vice Chair of Engagement
 - Young Advisor Team (YAT)
 - Future Leaders
 - Triangle Team
 - Member-to-Member Programs
 - National Quality Award (NQA)

NAIFA Membership Committee

Professional Staff

- **Corey G. Mathews** | cmathews@naifa.org | 850-294-3776
Vice President of Membership and Chapter Services. Staff Lead
- **Michele Borsuk** | mborsuk@naifa.org | 610-526-2555
Senior Director of Membership
- **Zack Huels** | zhuels@naifa.org | 703-770-8223
Director of Member Engagement
- **Javis Ogden** | jogden@naifa.org | 703-770-8145
Membership Sales Manager
- **Kevin Rara** | krara@naifa.org
Membership Specialist

Chapter Membership Scorecard

1	Do you have a complete and active Chapter Membership Committee?	Chair = +1 point +3 Committee Members = +1 point Monthly Meetings = +1 point
2	Did you identify prospective members and submit them to NAIFA? (Leads can come from events, communications, lists of prospects from agencies, etc.)	15 leads = 1 point 30 leads = 2 points 45 leads = 3 points 60+ leads = 4 points
3	Did your Chapter support the NAIFA Membership Campaign(s)?	Social Media Connection = +1 point Volunteers Repost/Share = +1 point Email to Members to Repost/Share/Forward Messages = +1 point
4	Did your Chapter make an Agency/Membership presentation (other than a general membership meeting) with non-members in attendance?	3 presentations = 1 point 4 presentations = 2 points 5+ presentations = 3 points

Chapter Membership Scorecard

5	Did your Chapter send an email, call, social media post, or other means of onboarding <u>EVERY</u> new member and welcoming them?	3 points
6	Did your Chapter promote NAIFA Engagement Programs to your members?	Actively Encourage & Grow Your Triangle Team Count = +1 point Identify & Report Contacts in Colleges & Universities for Future Leaders = +1 point Actively Promote Future Leaders and/or YAT Advisor Academy = +1 point Actively Promote National Quality Awards and/or AT Podcast = +1 point Active Member Awards/Recognition Program = +1 point Active YAT Committee = +1 point
7	Did your Chapter Make Member Care & Expired Member Calls? (Power Hours, etc.)	We made some of our calls = 1 point We made the majority of our calls = 2 points We made all of our Care Calls = 5 points We made all of our Care Calls & Expired Calls = 8 points

Chapter Membership Scorecard

8	What percentage of NET membership growth did your Chapter have?	Decline = 0 points +1 Growth = 1 point 1% Increase = 2 points 2% Increase = 4 points 3% Increase = 6 points 4% Increase = 8 points 5% Increase or More = 10 points
---	---	---



What tools and resources could we provide that would aid your efforts and help you achieve your membership goals?

Questions/Comments?

Javis Ogden
jogden@naifa.org

Chris Bor
cbor23@gmail.com



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Leaders^{★★}

Succession Planning: Building Your Bench for the Future



Cheryl Canzanella, LUTCF, CLU, ChSNC

President, NAIFA-Florida



Tom Ashley

Chapter Management Director, NAIFA

Objectives for today ---

- 1 Why leadership recruitment matters**
- 2 Strategies for successful recruitment**
- 3 Prepare new members for leadership**

Why Succession Planning Matters

Sustainability

Viability

Growth





What are some common obstacles to leadership recruitment?



Leadership Recruitment Strategies

01

Build a Strong Leadership Pipeline

02

Personalize the Ask

03

Remove Barriers & Provide Support

04

Communicate the Value Proposition

“Seeking Subject Matter Experts” A Proven Recruitment Technique!

Jen Mauer, CAE

Managed Chapter Executive, NAIFA
(NY, NJ, Maryland, Greater Washington, DC)





Dear GWDC members:

Good afternoon to you! I'm the Executive Director for NAIFA-GWDC and work with the Board to implement strategic actions and programs for 2025-2026. That brings me to why I'm contacting you.

We are seeking Subject Matter Experts and industry leaders who are experts in wealth management, financial planning, and management agency management. Would you consider joining our leadership team for 2025? We have a new structure of Thought Leader Cohorts that will target specific strategic actions the Board wants implemented. More information can be found on our [website here](#).

It's expected that these opportunities would not take more than 1-2 hours a month, with meetings held through Zoom. Our 16th Annual Success Summit Committee is already discussing new programs for February 2026. We're looking for energetic and fun people who are creative and can offer new ideas on how to expand our events.

I'd love to hear from you and gauge your areas of interest! And if you'd prefer to jump on a phone call, that would be great!

Got questions about NAIFA-GWDC? Just email me! I'm the executive director for NAIFA-GWDC and would love to update you about Chapter activities! Contact me at jmauer@naifa.org.

Finally, be sure to follow us on [LinkedIn](#) and [Facebook](#) to keep advised about all of our Chapter activities.

Cheers!
Jennifer Mauer, CAE
Executive Director

CALL FOR LEADERS

DO YOU HAVE WHAT IT TAKES TO SERVE ON OUR BOARD?

We are NOT looking for volunteers. We are NOT looking for "committee members". And we are NOT seeking names just to fill our roster.



Interviews for exclusive Board of Directors seats are being scheduled now. We seek:

- Experts in the financial planning and wealth management arenas.
- Industry titans who have mastered the art of management and can build a visionary future with our team of leaders.
- Individuals who have led teams of advisors and know what it

NAIFA
GREATER
WASHINGTON, D.C.

With benefit members with a deep understanding of the complexities of group health care and professional organizations.

If this sounds like you, then don't hesitate to complete this online form and send to the Chair of our Leadership Development committee. We will finalize a time to meet with you and learn your story. Tell us your successes. Tell us why your story is richer and more diverse than your colleague's story. Tell us what you will bring to the Board table and how you will contribute to our success in 2025-2026.



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NAIFA GREATER WASHINGTON, D.C.

Yes, I would like to bring my credentials to the attention of the NAIFA-GWDC Leadership Development committee.

Name*

FIRST NAME

LAST NAME

AGENCY NAME*

COMPANY/BROKER DEALER*

EMAIL*

PHONE*

THESE ARE MY AREAS OF INTEREST*

Submit Form

Online Form - NAIFA GWDC Leadership Development

“Seeking Subject Matter Experts” – One Technique Which Works!



Jen Mauer, CAE

E-mail: jmauer@naifa.org

Cell: **844-717-2858**

CASE STUDY



FLORIDA

RESOURCES

- ▶ NAIFA Chapter Playbook
(leaders.naifa.org/chapter-playbook)
(Chapter Leaders → Succession Planning)
- ▶ Chapter Leadership Board Cert. (12/11, 3:00 ET)
- ▶ Cohort calls – by chapter size (local and state)
- ▶ National Leadership Conference (NLC)

Introduction

The Chapter Playbook is an evergreen and regularly expanded toolkit of instruction and resources to facilitate Chapter operations, developed to clarify the standards of success for Chapters and provide a roadmap to help Chapter Leaders and Staff succeed.

For additional resources to assist you in getting the most out of the Chapter Playbook, visit our [site guide](#).



Chapter Leaders

As a volunteer leader at the State, Local or Affiliate level, we count on your leadership to aid in the success of NAIFA. Together we can take on anything, and we are better together!

Leadership Tools

2030 Strategic Plan

2025 Business
Implementation Plan

NAIFA Bylaws

Volunteer
Organizational Chart

Succession Planning

Why Volunteer

Installation of Officers

Guide to Leaders &
Executive Engagement
Requests

Acronym Dictionary

Succession Planning

Anyone who has served on a volunteer board can tell you that while it is a labor of love; it is a considerable labor, nonetheless. It is essential that potential board members are adequately informed on the expectations of service, including the time commitment, as well as the expected duration of service, depending on their leadership route. For instance, many positions may only require an obligation of a couple of years, while the path to President may require considerably longer.

It is also important to realize that board leadership is not meant to be eternal. Extensive studies have shown that extended service by board members as part of the same organization can lead to fatigue, stagnation of ideas and a deterrent to new leadership. Potential leaders are both hesitant to challenge a seasoned volunteer, and afraid that they will be expected to serve indefinitely as well.

A good **Board Succession Planning Policy** can be extremely helpful in guiding the organization's process for recruiting and developing new talent. Having a plan in place puts you in a posture to recruit top talent; avoid groupthink; promote diversity; maintain a balance of creativity and institutional knowledge; promotes trust between leaders and members; and maintains a balance of power on a board. NAIFA has developed a model [Succession Planning Policy](#) for consideration.

Strategies for Succession

All boards have a responsibility to articulate and make known their needs in terms of member experience, skills and many other considerations that define a "balanced" board composition.

In addition to the reasons listed above, two of the main reasons that members may be reluctant to commit to board service are a lack of clarity of what they are being asked to do and uncertainty on the amount of time they are being asked dedicate. Be prepared to answer these questions straight away.

A great tactic for attracting and engaging new volunteers is "**micro-volunteering**." This describes the process of asking a potential volunteer or team of volunteers to complete a small task as part of a larger project. The benefit is that the task is easily defined and of limited duration, making it easy for someone to commit to as a method for evaluating the benefit or reward from the engagement. When applied successfully, it is a great way to get potential volunteers to "test drive" involvement and consider an expanded role.

Additional Resources

In addition to the resources outlined above, NAIFA's [Building Your Bench: Successful Succession Planning Webinar](#) covers:

- Purpose & Responsibility of Succession Planning
- Generational Challenges
- Why is it Difficult to get Members Involved?
- Who are Your Potential Volunteers?
- Develop a Succession Planning Policy
- Role of the Governance Committee
- How to Engage Potential Leaders
- Strategies for Succession Planning
- Tools & Resources
- Training, Education, & Support
- Volunteer Appreciation

Quick Links

[Succession Planning Policy](#)

[NAIFA Member Engagement Commitment Form](#)

[Why Volunteer for NAIFA](#)

[Call for Leaders](#)

[Building Your Bench: Successful Succession Planning Webinar](#)

[Building Your Bench: Successful Succession Planning Webinar PowerPoint](#)

Key Takeaways

Recruitment works best when:

- Leaders are identified early & developed
- The “ask” is personal & clear
- Barriers are removed & support is provided
- The value of leadership is communicated



“If you fail to plan, you are planning to fail!”

— Benjamin Franklin



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Leaders^{★★}

Succession Planning: Building Your Bench for the Future



NATIONAL LEADERSHIP
Conference

October 14, 2025 | UVA Darden Sands Family Grounds Arlington, VA 22209

NAIFA Advocacy, Policy & Resources

by

NAIFA Government Relations

Welcome to NAIFA Advocacy





Crossover Question Set 1

① The Slido app must be installed on every computer you're presenting from

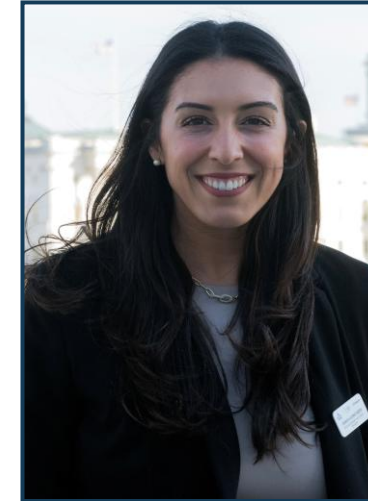
slido



Andrew Holt
Grassroots Advocacy
Director
Aholt@naifa.org



Roger Moore
Policy Director
rmoore@naifa.org



Bianca Weiss
State Gov. Relations
Director
bweiss@naifa.org



Cody Schoonover
PAC Manager
cschoonover@naifa.org



Stephanie Sheridan
Senior Political Director
ssheridan@naifa.org

Role as an Advocacy & Committee Leader

Government Relations Chair

- **Lead & Coordinate** → Guide your chapter's Gov. Relations Committee, collaborate with NAIFA Gov. Relations staff, and align messages on policy issues.
- **Advocacy Engagement** → Work with a lobbyist (best practice) or organize grassroots advocates (alternative) to monitor bills, engage legislators/regulators, and set priorities.
- **Communicate & Report** → Share policy updates with State Board of Directors and chapter membership at large, promote/attend advocacy events, and track lawmaker interactions in the Advocacy in Action Center (AAC).

Role as an Advocacy & Committee Leader

PAC & Candidate Selection Group (CSG)

- **Fundraise & Recognize** → PACs help candidates win elections by contributing to their war chests, the more money we raise, the more we can spend, and the more our influence in D.C., and the 50 statehouses grows. As our influence grows, so does our gratitude for our member's generous contributions to our efforts to influence lawmakers.
- **Follow the Law** → PACs are regulated at the federal and state levels of government, PAC chairs and chapter executives should be familiar with the applicable regulations in their states as they fundraise and spend PAC dollars.
- **Spend** → Influencing legislation starts with the legislators, PAC chairs should work in coordination with Grassroots chairs to create a Candidate Selection Group (CSG) process for identifying and approving disbursements for friendly state-level candidates.

Grassroots & CSG

- **Reporting Relationships with lawmakers** → NAIFA promotes the involvement of insurance and financial professionals with lawmakers at the state and national level who have interests consistent with NAIFA standards. The North Star for our efforts is knowing who our members have connections with at state & national level.
- **Interactions with Lawmakers** → There is no better spokesperson for the insurance and financial services industry than a NAIFA member. Members foster meaningful and lasting relationships with elected officials across every congressional district. Each time we engage, reporting the meeting notes is key to the successes of the association. Each time a NAIFA member connects with a lawmaker, it also helps to solidify their standing.
- **Action Alerts** → Participate in citizen lobbying by "Taking Action" on legislation that our government relations team is tracking. This is a great opportunity to set the stage for follow-up communication with key legislative offices on a variety of issues.



Crossover Question Set 2

① The Slido app must be installed on every computer you're presenting from

slido

Advocacy Processes

- **Policy Setting**

- NAIFA Members can submit potential policy issues for review to Roger and Bianca.
 - Step 1 → Check existing NAIFA Policy
 - Step 2 → Assess scope & industry impact
 - Step 3 → If necessary, review & discussion by NAIFA National Government Relations Committee
 - Step 4 → Recommendation to Board of Trustees if Committee decides the issue is impactful to NAIFA

- **What to Consider**

- For legislation:
 - Who is the sponsor of the legislation?
 - What is the political makeup of the state?
 - How much movement has there been on the legislation, if any?
 - Have other industry trade associations taken a position?
- For regulations:
 - Which agency proposed the regulation?
 - Is there a hearing and/or opportunity to submit comment letters?
 - Again, have other industry trades taken a position?
- NAIFA Government Relations also has a comprehensive Policy Manual that goes through review processes on an as-needed basis. Available to Advocacy Chairs.

Advocacy Processes (Cont'd)

- **PAC & Candidate Selection Group**

- Requesting funds for Federal Candidates from the National Candidate Selection Group
- Create a process for disbursing funds to state-level lawmakers in conjunction with the Grassroots chair
- Request recognition signage for chapter meetings
- Utilize QR codes and personalized contribution links to fundraise
- Use the Advocacy Action Center to contribute online

- **Grassroots**

- Financial Security Advocate Academy- Citizen Lobby Coaching
 - Graduate all NAIFA members through our premier training courses
- Action Alerts- Political Engagement
 - After legislation is introduced, NAIFA grassroots works with our government relations team to drive citizen lobbying efforts
 - Create a plan to mobilize NAIFA members for legislative/regulatory engagement
 - Emails, Meeting set up, phone calls, etc., depending on the political climate, where the bill stands, and the level of industry impact
- NAIFA in the Districts- Relationship building with lawmakers back home
 - To create lasting impact with lawmakers, we encourage our chapters and members to host events in the district during the August Recess
 - Sign up for Chapter Challenge
 - Set up virtual & in-person meetings with lawmakers and staff to continue contact post Congressional Conference
- NAIFA Stories- Partnership with ACLI

NAIFA & ACLI Grassroots Partnership

- Storytelling Videos
 - I'd like to take a few minutes to reflect on NAIFA's partnership on a successful project with the American Council of Life Insurers called "Storyteller" and the opportunity we see for state chapter leaders to take on a greater role.





Crossover Question Set 3

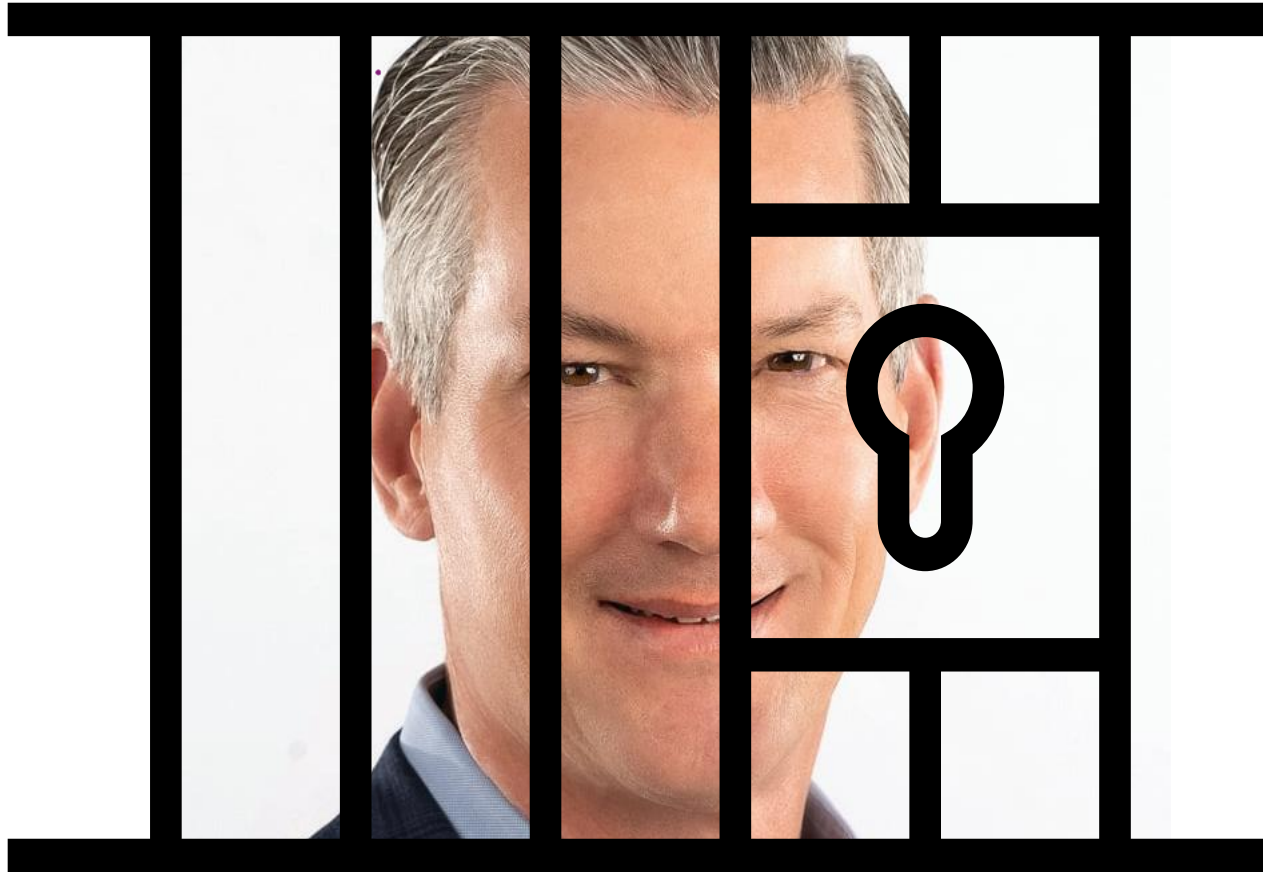
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Advocacy Resources (AAC ONLY)

- State Toolkits
- State Bill Tracking Sheets
- State Fact Sheets
- Grassroots Action Alerts
- Talking Points & Issue Briefs
- NAIFA on the Issues (Overarching Policy Stances)
- Reporting relationships/interactions
- Financial Security Advocate Academy (FSAA)
- Make/Increase PAC Contributions
- Access PAC Contributor Reports (Not on AAC?)
- GOTV

State IFAPAC Compliance Reminders



- Do you know who is on your PAC and Admin Fund Accounts?
- Who is listed on your State Campaign finance reports as officers of the PAC & are they still members?
- Does the balance in the bank match what is reported?
- Are you filing the name and address of each contributor to the chapter IFAPAC?



TM



BACK THE PAC DEFEND THE NATION



Become a PAC Defender Today!

Learn More at www.naifa.org/ifapac



Open Q&A



NATIONAL LEADERSHIP
Conference

October 14, 2025 | UVA Darden Sands Family Grounds Arlington, VA 22209

The Membership Sales Pipeline

Understanding the Process

By Paul Szkotak & Jarvis Ogden

The Sales Funnel/Pipeline

We are all familiar with it, and I am certain you could all probably name off the various levels if I asked you to, BUT...

What I want you to tell me is...

The fastest way to KILL IT?

CUT OFF THE LEADS!!!





What is the greatest obstacle you must overcome in identifying and obtaining new leads for your business?

IF YOU COULD GET SOME MORE LEADS



THAT WOULD BE GREAT

The Growth Flywheel

- Our first, and most important step is to locate and connect to “strangers” that are not yet familiar with NAIFA and attract them to one of our free industry resources.
- This allows us to begin communicating with them about the value of NAIFA membership and engage them in dialogue about whom we are and what we can do for them.
- Through engagement, we work to delight them with the benefits we offer, win them as members, and build them into the next generation of NAIFA leaders and promoters.



Our Tools to Drive Membership Conversion

- NAIFA utilizes several tools and applications to identify prospective members and nurture them to membership.
- The combined efforts of resources and your involvement can and will positively impact membership recruitment!

HubSpot



zoominfo

Feathr





- Zoominfo is a B2B platform that provides verified business contact and company information for marketing and communication purposes.
- Through Zoominfo, we can segment companies, job titles, locations, staff experience levels, and much more, to open meaningful lines of dialog to establish relationships and gauge interest in membership over time.
- Zoominfo is a powerful way to identify prospective members, but it is still no match for lists from members and volunteers of those they know are not yet members but should be!



Relationships formed on Zoominfo also contribute to NAIFA's 90-day membership nurture process.


Sales

[Advanced Search](#)

0%

JO

Navigation

Home

Advanced Search

Signals

Lists and records

Automations

Alerts

Advanced Search
New search experience

Filters 2

Likely to Engage

Contact Tags

Companies

Company Name

Contacts at Company

Current employees

Show All Filters

Quick Filters

My Target Accounts

Have Buying Group

Have Likely to Engage Co...

Contacts

Companies 4

Scoops

Select Companies

Export

Lists

Sort by

	Company Name	Signals	City, State
☐	 New York Life	8 signals	New York City, New York
☐	 Prudential		Newark, New Jersey
☐	 Northwestern Mutual		Milwaukee, Wisconsin

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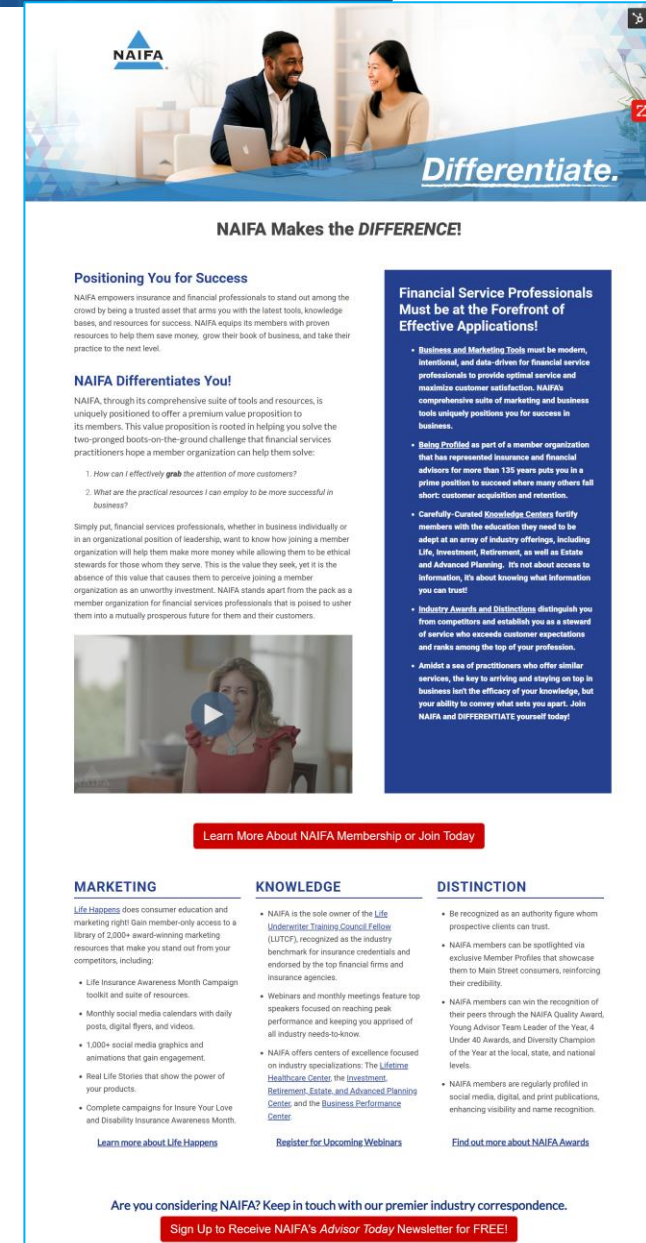
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- Feathr is a B2B digital web advertising platform specialized to service associations.
- Feathr utilizes “cookies” to identify and track prospects, following them across the internet to reinforce and remind them of our messaging.
- Feathr's system takes our digital ads and places them across the internet as clickable displays for visitors to be brought to the NAIFA website to learn more about membership.



- Clicks arrive to a specified NAIFA membership drive landing page.
- Landing pages are carefully designed to provide an opportunity to join immediately but also invite prospects to sign up for a free feature.
- By at least signing up for a free feature, they enter into our lead-nurture sales pipeline, making it easier for us to continue to market membership to them.



NAIFA

Differentiate.

NAIFA Makes the DIFFERENCE!

Positioning You for Success

NAIFA empowers insurance and financial professionals to stand out among the crowd by being a trusted asset that arms you with the latest tools, knowledge, bases, and resources for success. NAIFA equips its members with proven resources to help them save money, grow their book of business, and take their practice to the next level.

NAIFA Differentiates You!

NAIFA, through its comprehensive suite of tools and resources, is uniquely positioned to offer a premium value proposition to its members. This value proposition is rooted in helping you solve the two-pronged boots-on-the-ground challenge that financial services practitioners hope a member organization can help them solve:

1. How can I effectively **grab** the attention of more customers?
2. What are the practical resources I can employ to be more successful in business?

Simply put, financial services professionals, whether in business individually or in an organizational position of leadership, want to know how joining a member organization will help them make more money while allowing them to be ethical stewards for those whom they serve. This is the value they seek, yet it is the absence of this value that causes them to perceive joining a member organization as an unworthy investment. NAIFA stands apart from the pack as a member organization for financial services professionals that is poised to usher them into a mutually prosperous future for them and their customers.

Financial Service Professionals Must be at the Forefront of Effective Applications!

- **Business and Marketing Tools** must be modern, intentional, and data-driven for financial service professionals to provide optimal service and maximize customer satisfaction. NAIFA's comprehensive suite of marketing and business tools uniquely positions you for success in business.
- **Being Profiled** as part of a member organization that has represented insurance and financial advisors for more than 133 years puts you in a prime position to succeed where many others fall short: customer acquisition and retention.
- **Carefully-Curated Knowledge Centers** fortify members with the education they need to be adept at an array of industry offerings, including Life, Investment, Retirement, as well as Estate and Advanced Planning. It's not about access to information, it's about knowing what information you can trust!
- **Industry Awards and Distinctions** distinguish you from competitors and establish you as a steward of service who exceeds customer expectations and ranks among the top of your profession.
- **Amidst a sea of practitioners who offer similar services**, the key to thriving and staying on top in business isn't the efficacy of your knowledge, but your ability to convey what sets you apart. Join NAIFA and DIFFERENTIATE yourself today!

[Learn More About NAIFA Membership or Join Today](#)

MARKETING

Life Happens does consumer education and marketing right! Gain member-only access to a library of 2,000+ award-winning marketing resources that make you stand out from your competitors, including:

- Life Insurance Awareness Month Campaign toolkit and suite of resources.
- Monthly social media calendars with daily posts, digital flyers, and videos.
- 1,000+ social media graphics and animations that gain engagement.
- Real Life Stories that show the power of your products.
- Complete campaigns for Insure Your Love and Disability Insurance Awareness Month.

[Learn more about Life Happens](#)

KNOWLEDGE

- NAIFA is the sole owner of the Life Underwriter Training Council Fellow (LUTCFF), recognized as the industry benchmark for insurance credentials and endorsed by the top financial firms and insurance agencies.
- Webinars and monthly meetings feature top speakers focused on reaching peak performance and keeping you apprised of all industry needs-to-know.
- NAIFA offers centers of excellence focused on industry specializations: The Lifeline Healthcare Center, The Investment Retirement, Estate and Advanced Planning Center, and The Business Performance Center.

[Register for Upcoming Webinars](#)

DISTINCTION

- Be recognized as an authority figure whom prospective clients can trust.
- NAIFA members can be spotlighted via exclusive Member Profiles that showcase them to Main Street consumers, reinforcing their credibility.
- NAIFA members can win the recognition of their peers through the NAIFA Quality Award, Young Advisor Team Leader of the Year, 4 Under 40 Awards, and Diversity Champion of the Year at the local, state, and national levels.
- NAIFA members are regularly profiled in social media, digital, and print publications, enhancing visibility and name recognition.

[Find out more about NAIFA Awards](#)

Are you considering NAIFA? Keep in touch with our premier industry correspondence.

[Sign Up to Receive NAIFA's Advisor Today Newsletter for FREE!](#)



- HubSpot is our customer relationship management (CRM) tool to both capture and communicate to prospective members.
- All our marketing efforts are designed to capture information on prospective members, using it to engage with them by telling them “our story” and clearly communicating NAIFA’s unique value proposition.
- Prospective members are funneled through our sales pipeline via our newly built lead-nurture funnel where they receive strategic communications designed to convert them into members.

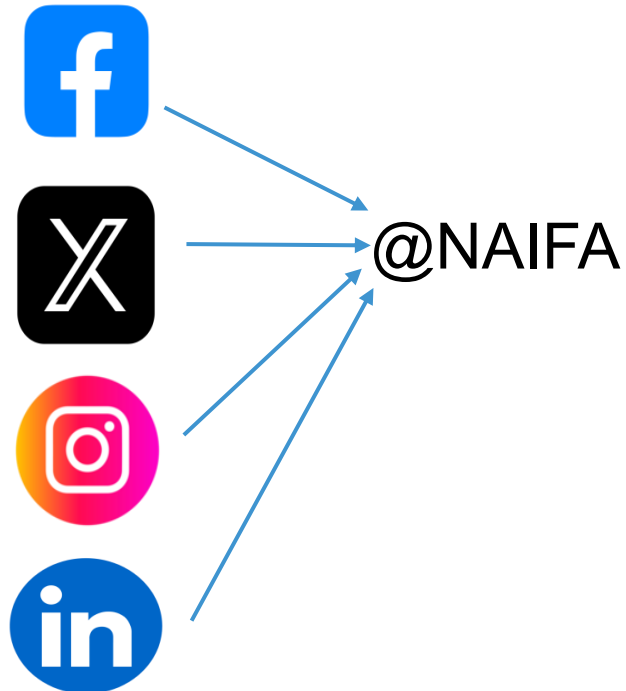


Prospects are gathered via several means and enter our sales pipeline:

Membership Marketing



Social Media Marketing



Tradeshows

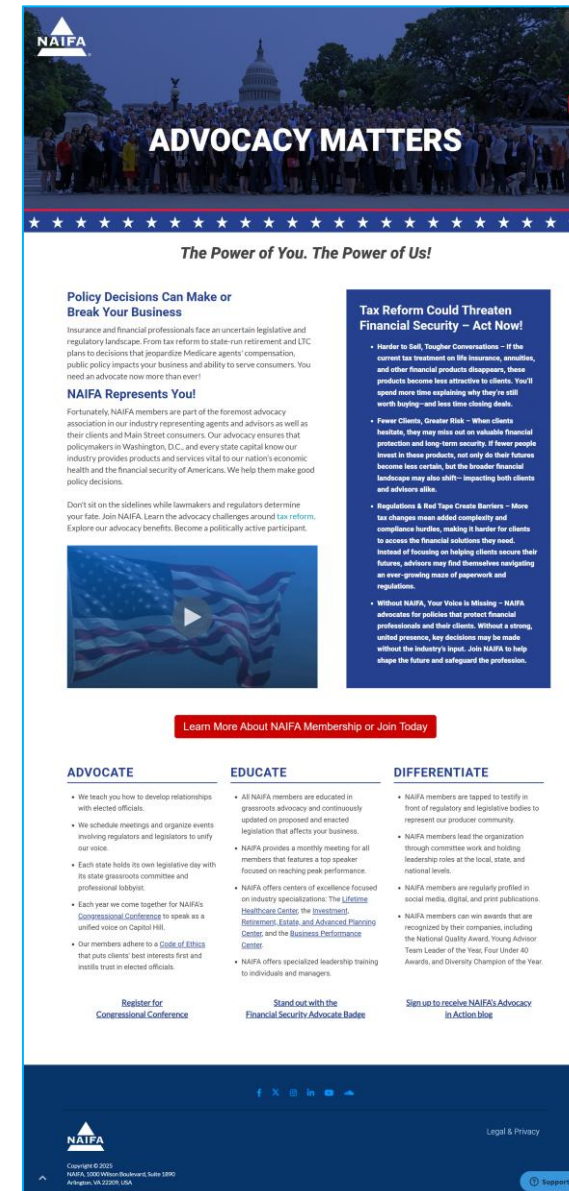


Digital Advertising



Membership Marketing

- Our year-long membership marketing strategy incorporates social media messaging to promote the value of membership.
- Campaigns are launched through different phases of the year, with all traffic directed to custom landing pages on the NAIFA website to get them to engage with our content



NAIFA

ADVOCACY MATTERS

The Power of You. The Power of Us!

Policy Decisions Can Make or Break Your Business

Insurance and financial professionals face an uncertain legislative and regulatory landscape. From tax reform to state-run retirement and LTC plans to decisions that jeopardize Medicare agents' compensation, public policy impacts your business and ability to serve consumers. You need an advocate now more than ever!

NAIFA Represents You!

Fortunately, NAIFA members are part of the foremost advocacy association in our industry representing agents and advisors as well as their clients and Main Street consumers. Our advocacy ensures that policymakers in Washington, D.C., and every state capital know our industry provides products and services vital to our nation's economic health and the financial security of Americans. We help them make good policy decisions.

Don't sit on the sidelines while lawmakers and regulators determine your fate. Join NAIFA. Learn the advocacy challenges around tax reform. Explore our advocacy benefits. Become a politically active participant.

Tax Reform Could Threaten Financial Security – Act Now!

- **Harder to Sell, Tougher Conversations** – If the current tax treatment on life insurance, annuities, and other financial products disappears, these products become less attractive to clients. You'll spend more time explaining why they're still worth buying – and less time closing deals.
- **Fewer Clients, Greater Risk** – When clients hesitate, they may miss out on valuable financial protection and long-term security. If fewer people invest in these products, not only do their futures become less certain, but the broader financial landscape may also shift – impacting both clients and advisors alike.
- **Regulations & Red Tape Create Barriers** – More tax changes mean added complexity and compliance hurdles, making it harder for clients to access the financial solutions they need. Instead of focusing on helping clients secure their future, advisors may find themselves wading through an ever-growing mass of paperwork and regulations.
- **Without NAIFA, Your Voice Is Missing** – NAIFA advocates for policies that protect financial professionals and their clients. Without a strong, united presence, key decisions may be made without the industry's input. Join NAIFA to help shape the future and safeguard the profession.

[Learn More About NAIFA Membership or Join Today](#)

ADVOCATE

- We teach you how to develop relationships with elected officials.
- We schedule meetings and organize events including regulators and legislators to unify our voice.
- Each state holds its own legislative day with its state grassroots committee and professional lobbyist.
- Each year we come together for NAIFA's Congressional Conference to speak as a unified voice on Capitol Hill.
- Our members adhere to a *Code of Ethics* that puts clients' best interests first and fosters trust in elected officials.

[Register for Congressional Conference](#)

EDUCATE

- All NAIFA members are educated in grassroots advocacy and continuously updated on proposed and enacted legislation that affects your business.
- NAIFA provides a monthly meeting for all members that features a top speaker focused on reaching peak performance.
- NAIFA offers centers of excellence focused on industry specializations: The *Lifetime Healthcare Center*, the *Investment, Retirement, Estate and Advanced Planning Center*, and the *Business Performance Center*.
- NAIFA offers specialized leadership training to individuals and managers.

[Stand up with the Financial Security Advocate Bader](#)

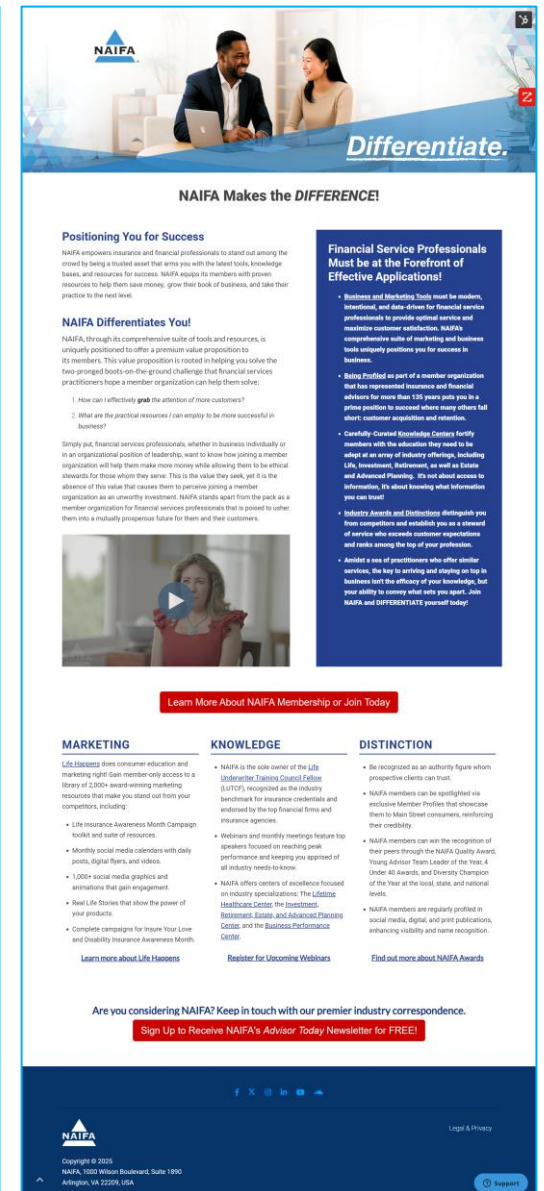
DIFFERENTIATE

- NAIFA members are tagged to testify in front of regulatory and legislative bodies to represent our producers community.
- NAIFA members lead the organization through committee work and holding leadership roles at the local, state, and national levels.
- NAIFA members are regularly profiled in social media, digital, and print publications.
- NAIFA members can win awards that are recognized by their companies, including the National Quality Award, Young Advisor Team Leader of the Year, Four Under 40 Awards, and Diversity Champion of the Year.

[Sign up to receive NAIFA Advocacy in Action blue](#)

Legal & Privacy

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Arlington, VA 22209 USA



NAIFA

Differentiate.

NAIFA Makes the DIFFERENCE!

Positioning You for Success

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[Learn More About NAIFA Membership or Join Today](#)

MARKETING

Life Insurance does consumer education and marketing right (and member only access to a library of 2,000+ award-winning marketing resources that make you stand out from your competitors, including:

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- 1,000+ social media graphics and animations that gain engagement.
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- Complete campaigns for issue Your Love and Disability Insurance Awareness Month.

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DISTINCTION

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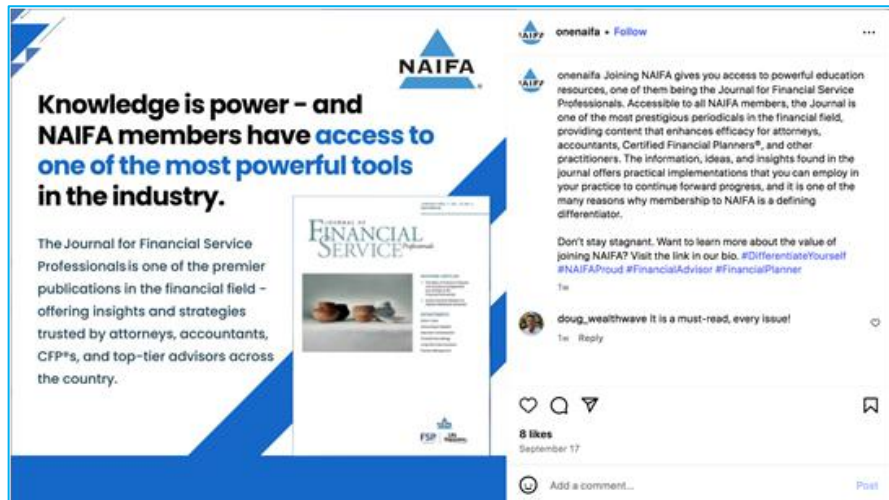
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Arlington, VA 22209 USA

Social Media Marketing

- Membership campaigns receive frequent social media posts throughout NAIFA's social channels to reinforce messaging.
- Social posts link back to the campaign landing pages, which either convert prospects to members at the point of contact, or enter them into the sales pipeline for nurturing.



Tradeshows



- We have begun to better leverage in-person opportunities to promote NAIFA and the benefits of joining by maintaining a presence at industry tradeshows.
- A list of all applicable tradeshows is kept, with volunteers located in the area for each asked to attend on behalf of NAIFA.
- Attendees either join on-site or opt in to receive communications from NAIFA, at which point they are entered into the sales pipeline and placed into our membership nurturing process.
- Attendees may also provide their contact information, which is given to the membership sales team, who enters them into the sales pipeline which places them into our membership nurturing process.

Digital Advertising



Typically used to reinforce our membership campaigns and attract new prospects.

NAIFA

Want to Be the Advisor of Choice?

NAIFA = Resources, Network & Results

[LEARN MORE](#)

Differentiate.

Grow faster, save time, earn more

This vertical digital ad features a man and a woman in business attire sitting at a desk with a laptop. The background is a light blue geometric pattern. The NAIFA logo is at the top left. The text "Want to Be the Advisor of Choice?" is in bold. Below it, "NAIFA = Resources, Network & Results" is in a smaller font. A red "LEARN MORE" button is in the middle. At the bottom, the word "Differentiate." is in a large, italicized font, followed by the tagline "Grow faster, save time, earn more".

NAIFA

Stand Out in Financial Services

NAIFA helps you grow faster
Join now. Save time & money

[LEARN MORE](#)

Differentiate.

This vertical digital ad features a man and a woman in business attire sitting at a desk with a laptop. The background is a light blue geometric pattern. The NAIFA logo is at the top right. The text "Stand Out in Financial Services" is in bold. Below it, "NAIFA helps you grow faster" and "Join now. Save time & money" are in a smaller font. A red "LEARN MORE" button is in the middle. At the bottom, the word "Differentiate." is in a large, italicized font.

NAIFA

Tired of going it alone?
NAIFA helps financial pros grow, connect & thrive.

[SEE HOW](#)

Differentiate.

This horizontal digital ad features a man and a woman in business attire sitting at a desk with a laptop. The background is a light blue geometric pattern. The NAIFA logo is at the top left. The text "Tired of going it alone?" is in bold, followed by "NAIFA helps financial pros grow, connect & thrive." in a smaller font. A red "SEE HOW" button is in the middle. At the bottom right, the word "Differentiate." is in a large, italicized font.

NAIFA

**Financial pros:
Want more clients & less stress?**
Join NAIFA—Tools. Training. Growth.

[LEARN MORE](#)

Differentiate.

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- Once in the sales pipeline, prospects are nurtured to membership through a series of strategic communications that promote the value of NAIFA membership for 90 days. If prospects have not been converted to members at the conclusion, they receive contact from the sales team for a personal close.



WHAT IS NAIFA ALL ABOUT?

Greetings Friend!

Thank you for allowing us just a few minutes to introduce you to NAIFA - the National Association of Insurance and Financial Advisors - and share a little about the only association with more than 135 years of representing your profession and protecting your clients on Main Streets all across our great nation.

NAIFA empowers financial professionals and consumers through world-class advocacy and education. We accomplish this through our brand promise to advocate for members and their clients, educate our members to be the most knowledgeable and respected in the profession, and differentiate our members so that potential clients will recognize them as advisors they can trust - or simply put... Advocate. Educate. Differentiate!

In the coming weeks, we will share additional information on each of these areas and why millions of financial professionals like you have been members of NAIFA. In the meantime, as a thank you for listening, we want to invite you to sign up for our Advisor Today blog at no cost to get important updates on what is happening in the industry, as well as access to new episodes for our sought-after podcast series. All you have to do is follow the link below:



Join more than 80,000 subscribers of our Advisor Today content brand. Stay current on the topics, issues, and trends impacting the insurance and financial services industry. Listen to our podcast and subscribe to our blog.

[Subscribe to the AT Blog](#)

Please feel free to email us with any questions about NAIFA or visit our [Member Benefits](#) page to learn more about why so many have answered the call to join.

Sincerely,

Janis Ogden
Membership Marketing Manager
joogden@naifa.org - (703) 770-8145

P.S. Are you ready to learn more and become a member? Click the button below and find out why financial professionals for generations have relied on NAIFA and why you should as well!

[Join Now](#)

National Association of Insurance and Financial Advisors
1000 Wilson Boulevard, Suite 1850, Arlington, VA 22209



You received this email because you are subscribed to Membership Recruitment Subscriptions from NAIFA. Update your email preferences to choose the types of emails you receive. Unsubscribe from all future emails.



Differentiate.

Greetings Friend!

You may be wondering how joining NAIFA can positively impact your business. You may be asking yourself, "How does joining NAIFA set me apart in the industry and position me for success?"

NAIFA Makes the Difference! NAIFA, through its comprehensive suite of tools and resources, is uniquely positioned to offer a premium value proposition to its members. This value proposition is rooted in helping you tackle two critical challenges that financial services professionals hope a member organization can help them solve:

- How can I effectively grab the attention of more customers?
- What are the practice resources I can employ to be more successful in business?



As a NAIFA member, you get:

Simply put, joining NAIFA helps make and save you money while providing you with educational, networking, and recognition tools unlike any other that **DIFFERENTIATES** you in a crowded industry.

This only scratches the surface! NAIFA empowers insurance and financial professionals to stand out among the crowd by being a trusted asset that arms you with the latest tools, knowledge, leads, and resources for success. NAIFA expects to meet with proven resources to help them save money, grow their book of business, and take their practice to the next level.

[Learn more about all the membership to NAIFA offers and how it all GETS YOU THERE!](#)

Plus, you can sign up online for NAIFA's Advisor Today Newsletter - a great way to stay updated on key developments, and how they can impact your business's viability in the industry.

[Sign Up to Receive NAIFA's Advisor Today Newsletter for FREE!](#)

Please feel free to email us with any questions about NAIFA or visit our [Member Benefits](#) page to learn more about why so many have answered the call to join.

Sincerely,
Janis Ogden
Membership Marketing Manager
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[Join Now](#)

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You received this email because you are subscribed to Membership Recruitment Subscriptions from NAIFA. Update your email preferences to choose the types of emails you receive. Unsubscribe from all future emails.



BELONG TO SOMETHING BIGGER.

Greetings Friend!

As a dedicated financial services professional, every tool and resource you invest in should empower you to enhance your practice - without consuming your time. That's precisely why NAIFA (The National Association of Insurance & Financial Advisors) is designed with you in mind. From advocacy and education to marketing and professional recognition, NAIFA delivers immediate, measurable benefits that place its members in the 9th of financial professionals who not only survive in the industry, but thrive!

[Join Now](#)

"Here's why joining NAIFA is a smart investment:"

1. Enhance Your Expertise with Industry-Leading Credentials

- LUTCF Certification:** NAIFA is the exclusive owner of the [LUTCF](#) designation. [Trusts, Grants, Estates, LUTCF](#) designations - the industry's top benchmark for insurance credentials. It's widely esteemed by top finance firms and agencies, helping you stand out through deep industry knowledge and credibility.

2. Stay Ahead with Continuous Learning & Events

- Year-Round Webinars & Professional Development:** Keep your skills sharp and current with access to a full calendar of webinars and nonwebinar updates across multiple disciplines.

3. Elevate Your Visibility with Ready-to-Use Marketing Tools

- Life Happens Center:** Gain access to a library of over 2,000 award-winning, customer-facing marketing materials from [Life Happens](#). Perfect for boosting your brand and connecting authentically with clients.

4. Gain National Recognition and Distinguish Yourself

- NAIFA Awards:** Become eligible for prestigious honors such as the [NABIA Gold Award](#) and other [NAIFA](#) accolades. These accolades showcase your commitment to excellence, helping you rise above the competition.

5. Be Advocated For—On Every Level

- Unmatched Advocacy Reach:** NAIFA stands alone as the only association representing your interests in every state capital and in Washington, D.C. The [Congressional Oversight Committee](#)—including lobbying and monitor training—helps safeguard your business and client interests at all levels.

6. Immediate Impact, Real Returns

- From enhancing client services and marketing reach to fortifying your business's regulatory resilience—NAIFA offers tools and support that you can deploy immediately to elevate your effectiveness and profitability.

Become Part of the NAIFA Nation Today!

[Join Now](#)

Let's Talk More:

If you're interested in exploring how NAIFA membership can benefit you, your clients, and your business, I'd be happy to schedule a brief call to discuss further. Simply reply to this email with some great times to talk, and I will send you an invite to connect. I look forward to hearing from you!

Best Regards,

Janis Ogden
Membership Marketing Manager
joogden@naifa.org - (703) 770-8145



You received this email because you are subscribed to Membership Recruitment Subscriptions from NAIFA. Update your email preferences to choose the types of emails you receive. Unsubscribe from all future emails.



POWER OF THE PIN.

Greetings Friend!

I wanted to follow up on my earlier note because I truly believe NAIFA membership can have a powerful impact on your career and business. Many of your peers are already leveraging NAIFA's unmatched combination of advocacy, professional development, marketing tools, and recognition—and I don't want you to miss out.

Here's what you gain by joining NAIFA:

- Advocacy that protects your livelihood:** NAIFA is the only organization representing insurance and financial advisors in every statehouse and on Capitol Hill. Your business and your clients' best interests are defended at the highest levels.
- Education that keeps you sharp:** From the exclusive LUTCF designation to ongoing webinars and training, you'll always be ahead of the curve.
- Marketing resources that win clients:** Access to 2,000+ award-winning, client-ready materials from Life Happens—ready to put into action immediately.
- Recognition that sets you apart:** NAIFA's awards, including the prestigious **National Quality Award**, elevate your credibility and reputation.

Every one of these benefits is designed to help you grow, protect, and sustain your practice.

Now is the perfect time to join NAIFA—so you can start taking advantage of these resources right away and position yourself for long-term success.

Become Part of the NAIFA Nation Today!

[Join Now](#)

I'd be glad to answer any lingering questions or talk through how NAIFA can make a difference for you specifically. When would be a good time to connect?

Looking forward to welcoming you.

Janis Ogden
Membership Marketing Manager
joogden@naifa.org - (703) 770-8145



You received this email because you are subscribed to Membership Recruitment Subscriptions from NAIFA. Update your email preferences to choose the types of emails you receive. Unsubscribe from all future emails.

So, now you have seen what we have been building to accelerate our membership growth...

**Here is the essential role
we need you to play to
contribute to our success!**

How You Can Contribute!

1. Interact with NAIFA social media posts!

- The more interactions a post has, the more likely it is to be shown to entire new audiences who are not NAIFA members or have familiarity with NAIFA.
- Shares and comments don't just boost reach — they push content in front of new networks.
- The more interactions, the more the platform pushes content into prospective members' feeds.

2. Incorporate weekly scheduled time to check-in on NAIFA channels and engage with posts.

- Remembering to interact with NAIFA content on social media is easier said than done as we all maintain busy day-to-day schedules.
- Consider setting an alarm or alert in your phone at the same time each week as a reminder to take 5 minutes to log in and like, share, comment, and repost NAIFA membership content.



WE CAN DO OUR PART TO HELP GIVE OUR MESSAGING A BIG BOOST

For each of our social media platforms, there are a set of actions you can take to help, found directly below each post. See below for a guide to ways that you can engage with NAIFA social content.

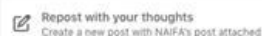
LINKEDIN FROM LEFT TO RIGHT



Like – Click or tap this button to "Like" a post. The more Likes a post has, the greater the chance that LinkedIn will show that same post to others who view similar content. This can lead to more prospects and members!

Comment – Click or tap this button to leave a comment on a post. Comments inform LinkedIn that this post has industry relevance and should be presented to the homepage feeds other individual and company profiles. You can also click or tap directly into the comment box to perform the same action.

Repost – Click or tap this button to repost a post to your homepage.



OR



You can either create a new post with your own thoughts

you can simply repost the the same post without adding a new thought



WE CAN DO OUR PART TO HELP GIVE OUR MESSAGING A BIG BOOST

For each of our social media platforms, there are a set of actions you can take to help, found directly below each post. See below for a guide to ways that you can engage with NAIFA social content.

FACEBOOK FROM LEFT TO RIGHT



Like – Click or tap this button to "Like" a post. The same principal applies, so the more Likes, the better!

Comment – Commenting on a post on Facebook helps it to go "viral", meaning if a NAIFA post gets enough comments, it will be shown to millions of people who view similar content.

Send – Click or tap this button if you want to directly send a post to a specific destination, such as a person's email or text messages.

Share – Click or tap this button to share a post from your homepage on Facebook. This functions similar to LinkedIn's repost feature.



You can either leave a comment and repost. OR you can simply repost the same post without adding a comment of your own

If you have any questions or input for interacting with NAIFA social content, feel free to reach out to Jarvis Ogden, Membership Sales Manager, at jogden@naifa.org.



WE CAN DO OUR PART TO HELP GIVE OUR MESSAGING A BIG BOOST

For each of our social media platforms, there are a set of actions you can take to help, found directly below each post. See below for a guide to ways that you can engage with NAIFA social content.

INSTAGRAM

FROM LEFT TO RIGHT

85 16

Like – Click or tap this button to "Like" an Instagram post. Remember to always hit those likes!

Comment – Click or tap this button to leave a comment on an Instagram post. Facebook and Instagram are run on the same system, so comments can go a long towards getting NAIFA content in front of more people so they can learn who we are.

Share – Click or tap this button if you want to directly send a post to a specific destination, such as a person's email or text messages, or if you want to share it to your Facebook page!

If you have any questions or input for interacting with
NAIFA social content, feel free to reach out to
Javis Ogden, Membership Sales Manager, at jogden@naifa.org.



WE CAN DO OUR PART TO HELP GIVE OUR MESSAGING A BIG BOOST

For each of our social media platforms, there are a set of actions you can take to help, found directly below each post. See below for a guide to ways that you can engage with NAIFA social content.

TWITTER/X

FROM LEFT TO RIGHT

1 1 63

Comment – Click or tap this button to leave a comment on a Twitter post. Let's go viral!

Retweet – Click or tap this button to repost a Twitter/X post to your own feed. Think of this as Twitter/X's version of reposting.

Like – Click or tap this button to "Like" a post on Twitter/X.

If you have any questions or input for interacting with
NAIFA social content, feel free to reach out to
Javis Ogden, Membership Sales Manager, at jogden@naifa.org.

How You Can Contribute!

3. Pass along information on tradeshows and volunteer to represent NAIFA.

- The membership team keeps a list of all known and attended tradeshows, but we may not be aware of every opportunity. If you know of tradeshows that should be added to the list, let us know!
- We're always looking to have NAIFA represented at tradeshows to help with membership. If you'd like to volunteer to be a representative of NAIFA at a tradeshow in your market, let us know!

4. Forward campaign content to people you know who are not yet members of NAIFA but should be!

- Email deliverability can be tricky and getting someone to open your email even more so.
- Peer-to-peer emails are more likely to be received, open, and read!

5. Send us any list of prospective members you can get your hands on!

- The more prospects we can identify, the more memberships we can convert.
- We want as much information as you can give us, but all we must have is a name and email.



What other ways can your Chapter help us identify and engage more prospective members and get them into our sales pipeline?

Questions/Comments?

Javis Ogden
jogden@naifa.org

Paul Szkotak
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