Member Refresher

WELCOME TO THE NEW NAIFA


2019

NAIFA

MEMBER

The National Association of Insurance and Financial Advisors

Established 1890

One NAIFA

National + State + Local/Affiliates

Get Buttoned Up for a Great Year!

DATES & TO DO'S FOR 2019

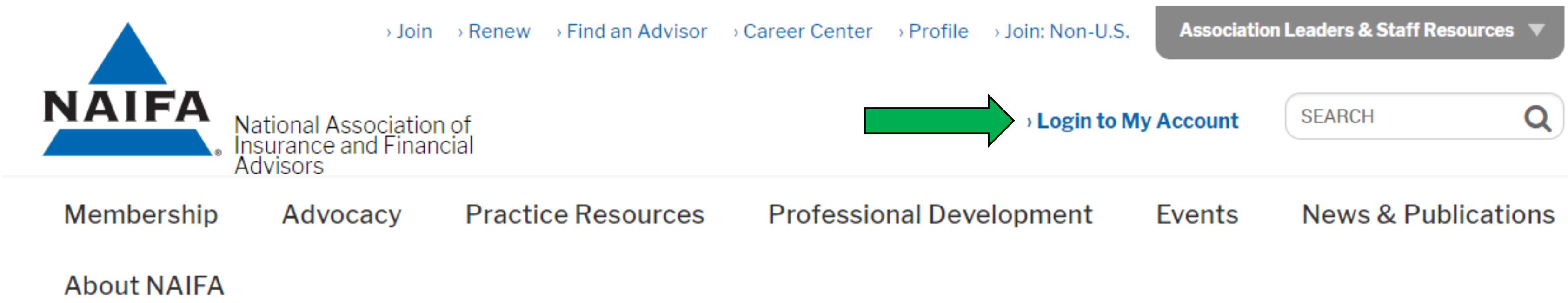
Housekeeping Items

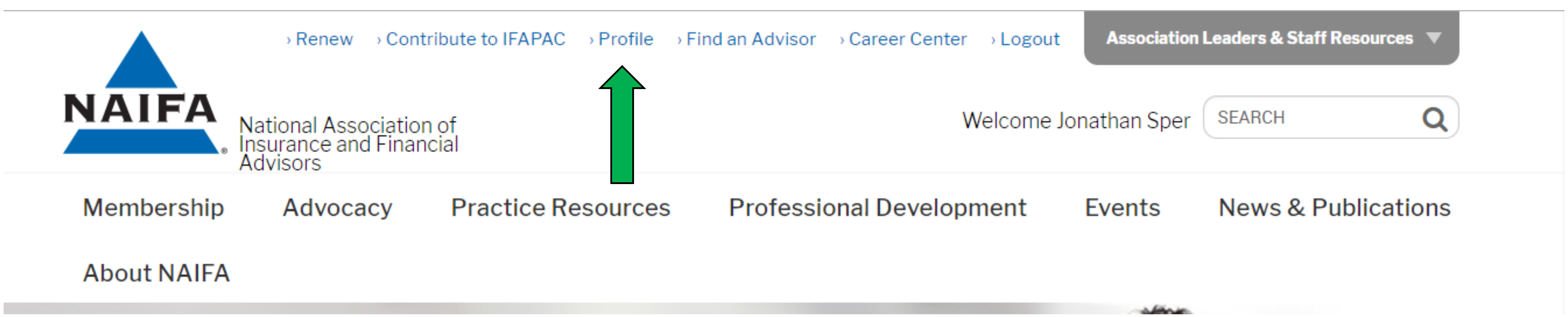
- Update your profile 2019
- Login Instructions:
  - Member ID
  - Last Name (default) or Last Name+naifa

info@naifa.org

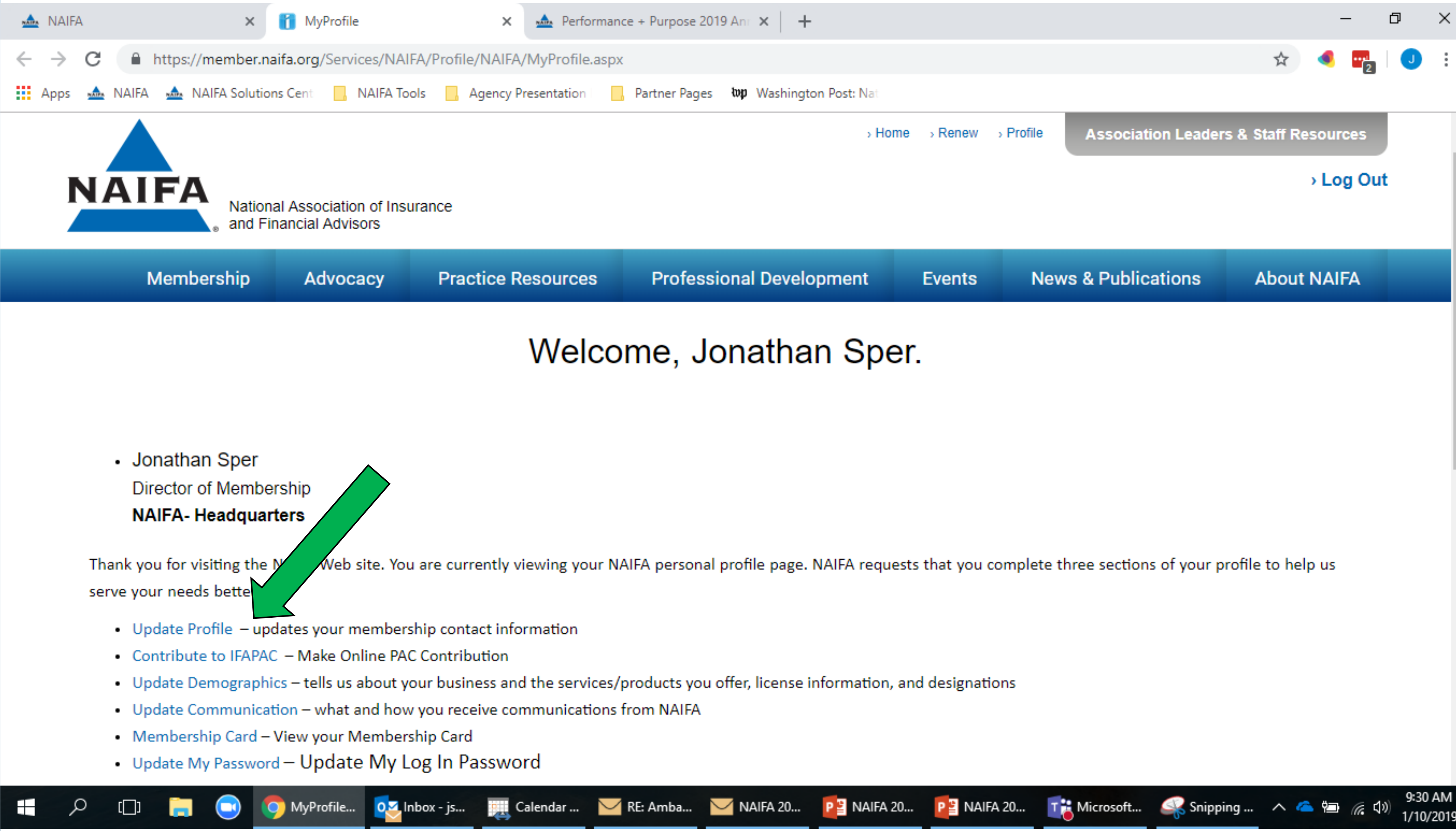
877-866-2432

Updating Your Profile





NAIFA 20/20 | MEMBER EXPERIENCE



2019 Refresher Program

Every month in 2019 we are hosting a deeper dive webinar into a specific NAIFA benefit.

January	NAIFA Benefits Refresher
February	Client Cast tour & Upgrade
March	Advanced Advocacy
April	Professional Pathway & Competency plan
May	Publications, Papers & Research
June	Mentor Matching & Study Groups

July	Making the most of NAIFA Content
August	Writing Opportunities
September	NAIFA Citizenship
October	Specialization Groups
November	Calendar Planning Tool
December	Leadership Pathway

2 National Events

Congressional Conference (Con Con)

- Advocacy Training & Day on the Hill
- May 14-15 in Washington, D.C.

Performance + Purpose (P+P)

- Professional education conference
- September 11-14 in Orlando, Florida

The rebirth of NAIFA

Imagine living to be 129 years old like NAIFA! That's a long time to go from crawling to running while working through the growing pains. NAIFA has also seen and done a lot in its years. NAIFA has taken good care of itself and great care of the insurance and financial-services industry. There have been great stewards of the health and wellness of our organization—leaders who have questioned and listened and maintained an exceptional attitude.

While many organizations of the same age would be on life support right about now, NAIFA is having a rebirth. It's exciting to think that an organization that is grey around the temples would have such an opportunity.

Our NAIFA renaissance is one of rejuvenation. We are doing something extraordinary by creating a bold new spirit to move us forward as we deliver exceptional value to all members. It's our own bridge between the old and the new. We are not starting at the beginning and we do not have to suffer through the teenage years. Instead, we have the benefit of having wisdom that was gained over time and the fresh energy and vitality of our new-found direction.

Jill Judd, President

Advocate. Educate.
Differentiate.

Advocate.

For Your Business. For Your Clients. For Your Industry.

Keep Our Footprint Strong!

State of the Union Webinars at End of Every Quarter—Dates to be Announced Soon

Month #3: March 2019

- Advanced Advocacy Training & IFAPAC Deep Dive with GR & IFAPAC Team
- Prep to go to state and federal meetings
- Introduction to Congressional Conference & invitation to join us in May 14-15th in Washington, DC!

NAIFA's PAC Strength

Top Tier in the Insurance Industry

Insurance PACs

1. New York Life Insurance
2. **National Association of Insurance & Financial Advisors**
3. Council of Insurance Agents & Brokers
4. USAA
5. Independent Insurance Agents & Brokers/America
6. AFLAC Inc.
7. Massachusetts Mutual Life Insurance
8. American Council of Life Insurers
9. State Farm Mutual Automobile Insurance
10. Liberty Mutual Insurance

Month #3 focuses on IFAPAC and what a PAC chair does & how you can make a difference!

Through 2018 Election Cycle - www.opensecrets.org

Corporate Partners

- Ameritas
- State Farm
- Guardian
- Ohio National
- New York Life
- Advisor Group
- Kansas City Life
- Mass Mutual
- Gateway Insurance & Financial Advisors
- Principal Financial Group
- Northwestern Mutual

CTA for Membership

- Spread the word! New NAIFA
- Maintain & increase our Congressional footprint
- Revitalize & rejuvenate your area
- Recommend new members attend the new member sessions

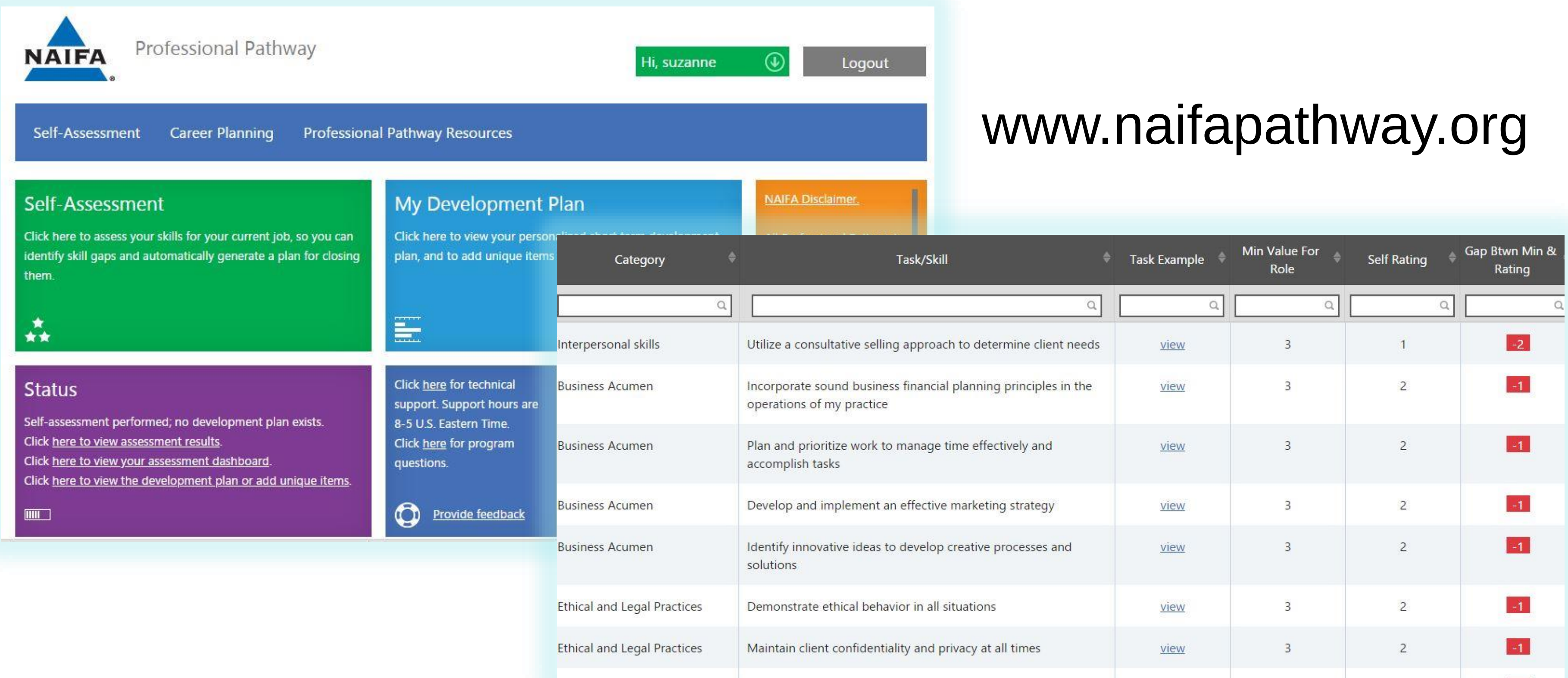
Educate

Be Your Best. Inspire Your Clients to Be Their Best.

Pursuit of Personal Excellence

- Self-improvement & compliance through self-assessment and self-study
- Peer-to-peer education & idea exchange with colleagues
- Culture of meritocracy
- Earned mark of distinction through certification & designation

NAIFA's Professional Pathway

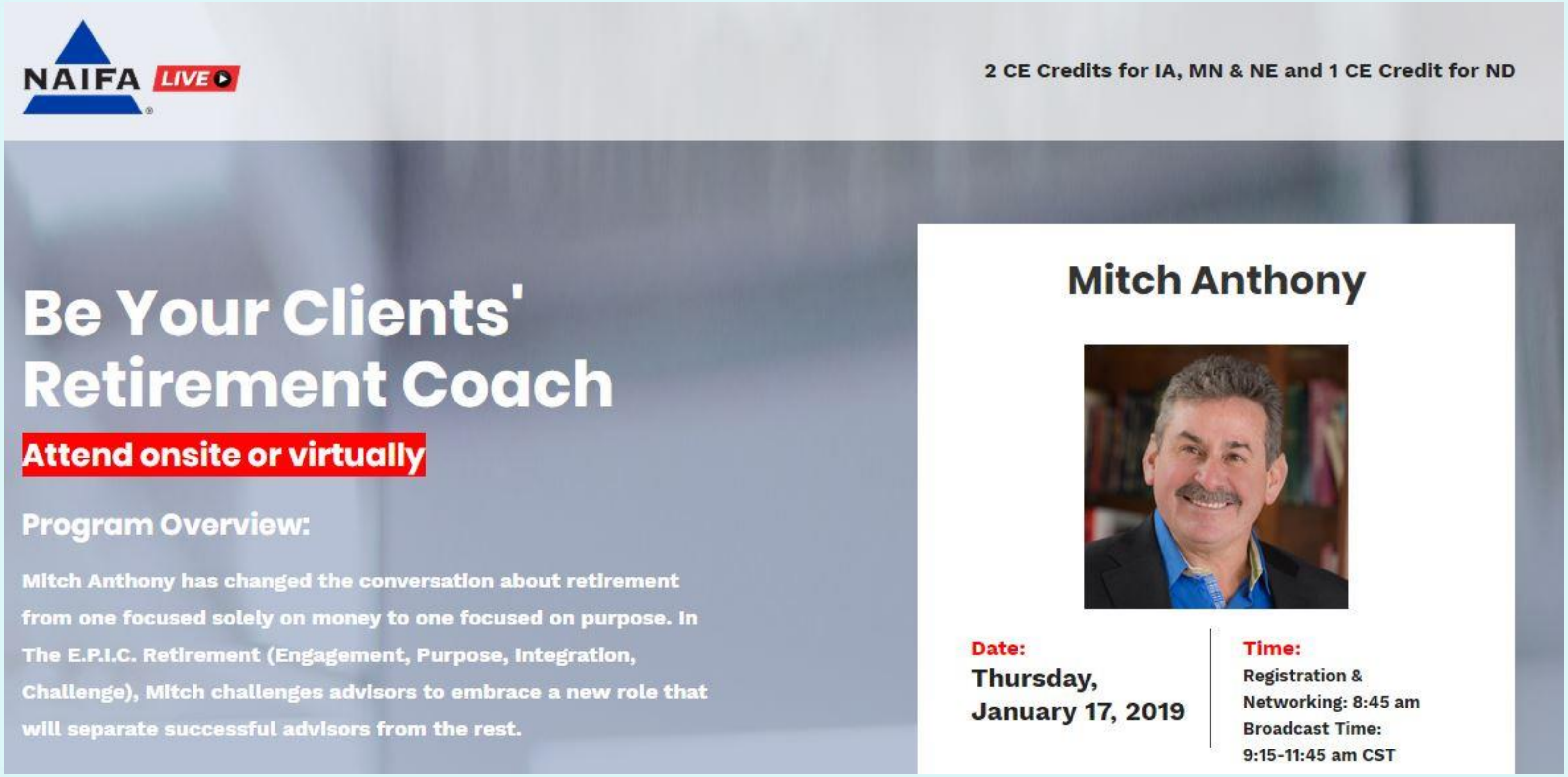


www.naifapathway.org

1st Interactive Competency Model

National, Regional & Local CE- Based Meetings

NAIFA Live


NAIFA LIVE
2 CE Credits for IA, MN & NE and 1 CE Credit for ND
Be Your Clients' Retirement Coach
Attend onsite or virtually
Program Overview:
Mitch Anthony has changed the conversation about retirement from one focused solely on money to one focused on purpose. In The E.P.I.C. Retirement (Engagement, Purpose, Integration, Challenge), Mitch challenges advisors to embrace a new role that will separate successful advisors from the rest.
Mitch Anthony
Date:
Thursday, January 17, 2019
Time:
Registration & Networking: 8:45 am
Broadcast Time: 9:15-11:45 am CST

Annual National Meeting

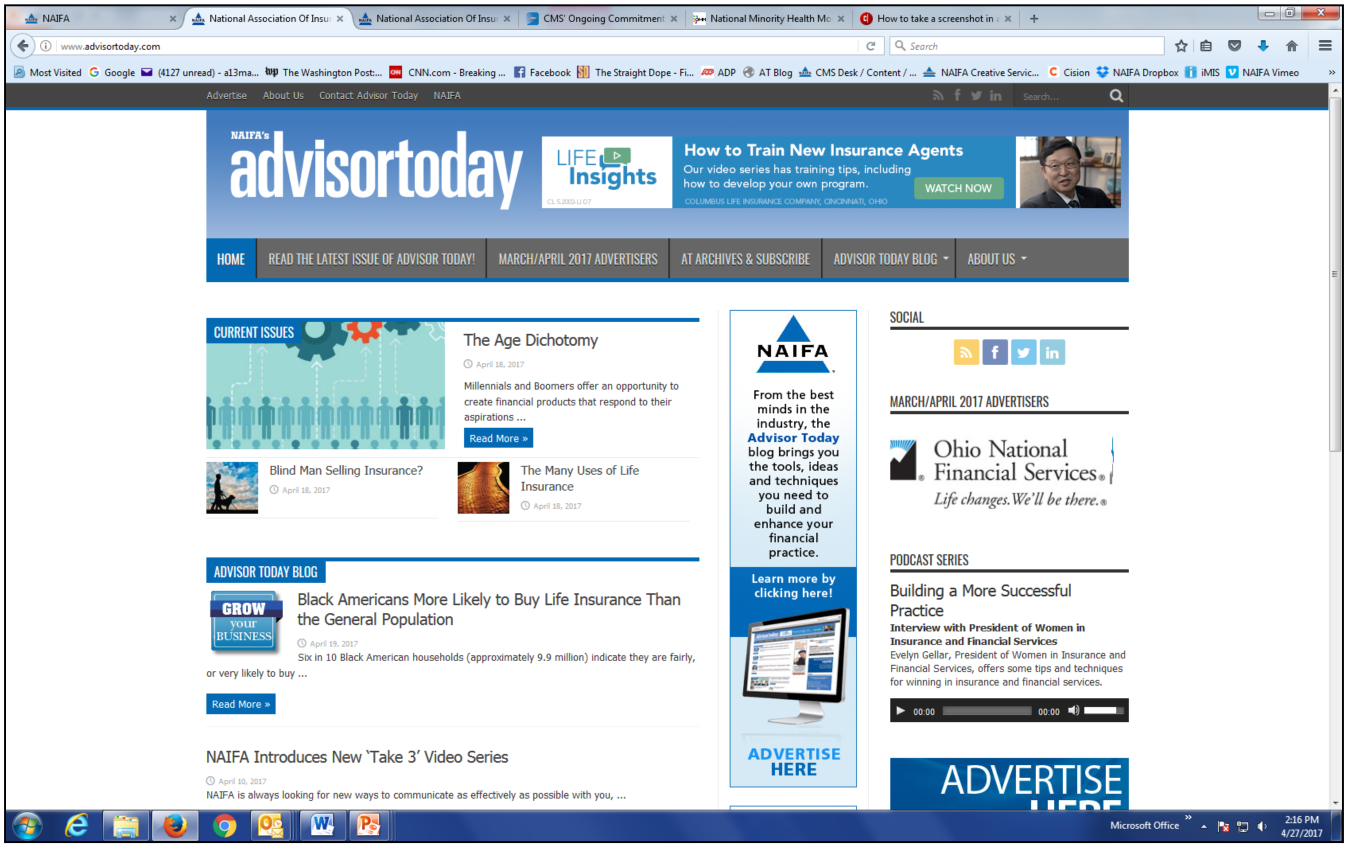
- Educational Sessions
- **Networking through Brain Dates**
- Camaraderie
- Association Business

NAIFA Certifications

NAIFA LACP

NAIFA LUTCF

Publications



Email Subscriptions

NAIFA National Association of Insurance and Financial Advisors

› Join › Renew › Agent Locator › Career Center › Profile | Association Leaders & Staff Resources

› Login to My Account

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scarawan@naifa.org

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  Receive updates on the latest news

NAIFA Learning Center

www.naifalc.org

NAIFA

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Posted on November 18, 2018
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Madison, WI | April 29 – May 1, 2019


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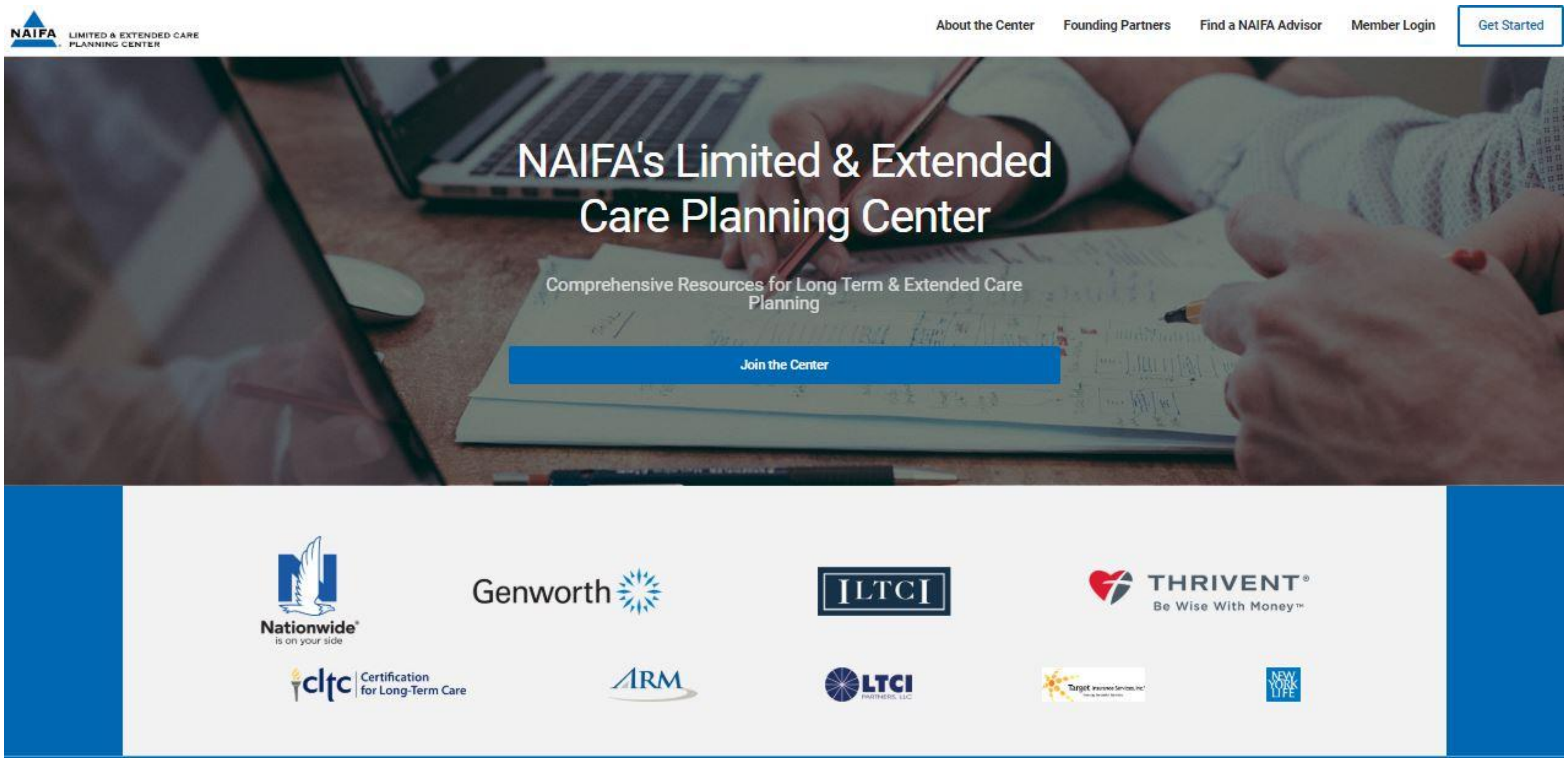
LECP for Long Term Care



ILTCI 2019 Conference

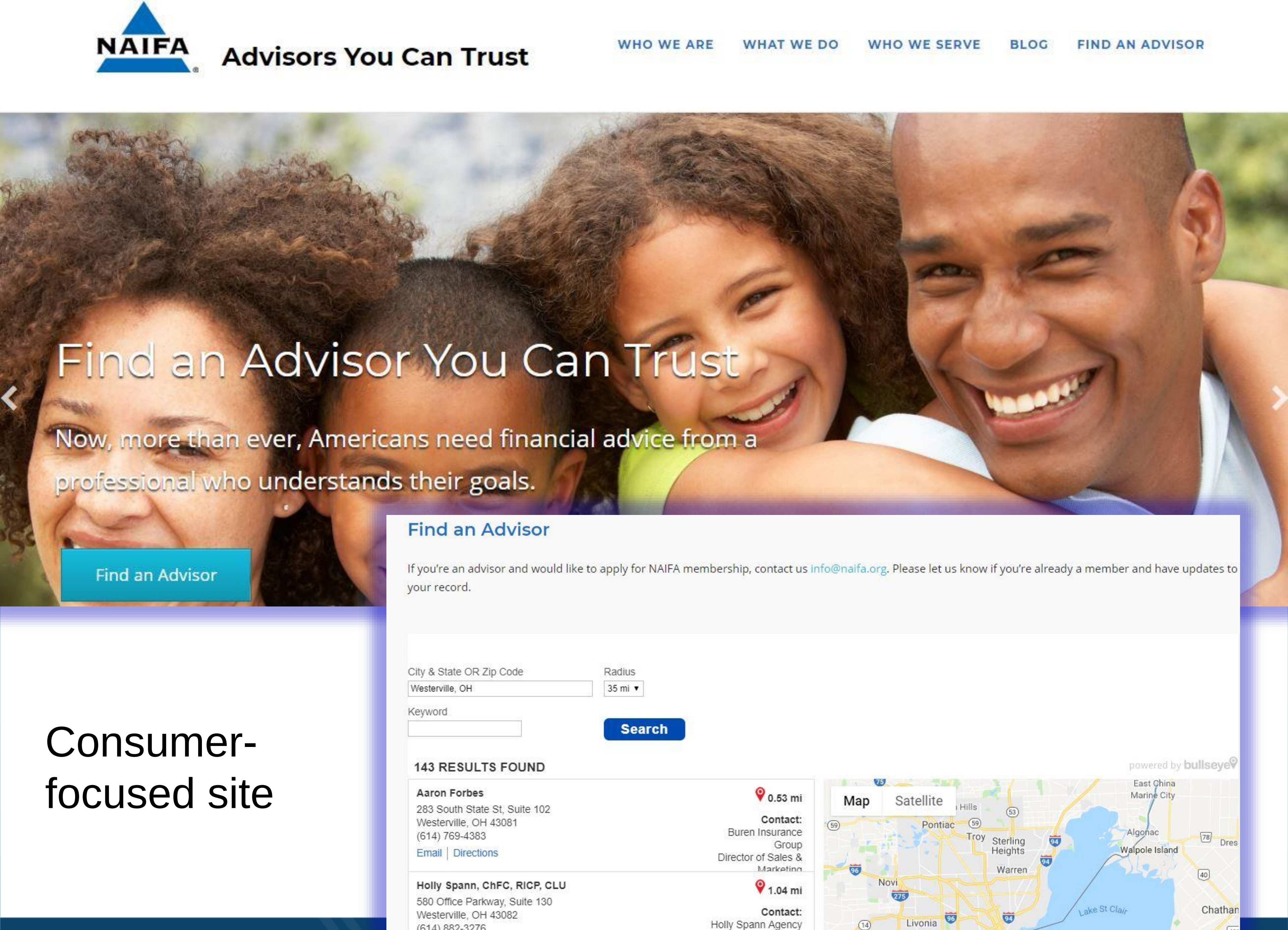
Code: NAIFA

Months #2 & #4

- Month#2: ClientCast & PowerSession Live Deep Dive
- Month #4: Professional Pathway Competency Plan by # Years an Agent

Differentiate

Stand Out from Your Competition.
Grow Your Brand.



Consumer-focused site

AdvisorsYouCanTrust

- Make sure you're listed on www.advisoryoucantrust.org
  - Opted-in
  - Full business address in profile to allow for geo-location
  - Fill in your designation field in profile

New Partner Associations

- NAAIA
- LAAIA
- WIFS
- NAILBA

Foundation Programs

- GAMA
- ACLI

Revitalizing Awards & Programs

QUALITY
NAIFA
AWARD

NAIFA® lili

LEADERSHIP IN LIFE INSTITUTE®

Differentiate Yourself

Specialty groups

- Young Advisors Team
- Diversity & Inclusion Task Force
- Women Advisors
- Leadership in Life Institute (LiLi)
- Limited & Extended Care Planning Center
- Advanced Markets

Gain visibility

- Certifications
- Advisor Ambassador
- Webinar, Conference & Meeting Speakers
- Content Contributor to Blogs & AT Magazine
- Volunteer Leadership

Months #6, 7, 8

- Month #6: Mentor Matching/Study Groups
- Month #7: Are You Making the Most of NAIFA Content?
- Month #8: Writing & Speaking Opportunities for NAIFA

Months #9, 10, 11, 12

- Month #9: NAIFA Citizenship
- Month #10: Specialization Groups
- Month #11: Calendar Planning Tool
- Month #12: Leadership Pathway

It’s A New NAIFA