

Member Refresher

# **WELCOME TO THE NEW NAIFA**





**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



National Association of  
Insurance and Financial  
Advisors

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Advocacy

Practice Resources

Professional Development

Events

News & Publications

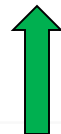
About NAIFA



National Association of  
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Welcome Jonathan Sper

SEARCH



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About NAIFA

## Welcome, Jonathan Sper.

- Jonathan Sper  
Director of Membership  
**NAIFA- Headquarters**

Thank you for visiting the NAIFA Web site. You are currently viewing your NAIFA personal profile page. NAIFA requests that you complete three sections of your profile to help us serve your needs better.

- [Update Profile](#) – updates your membership contact information
- [Contribute to IFAPAC](#) – Make Online PAC Contribution
- [Update Demographics](#) – tells us about your business and the services/products you offer, license information, and designations
- [Update Communication](#) – what and how you receive communications from NAIFA
- [Membership Card](#) – View your Membership Card
- [Update My Password](#) – Update My Log In Password



# 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!**

# *ELECT TO BE* **A NAIFA MEMBER**

## SPEAKERS



Jill Judd



Kevin Mayeux



Diane Boyle

**Listen to the webinar**



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 14-15<sup>th</sup> in Washington, DC!





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

# 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

# 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

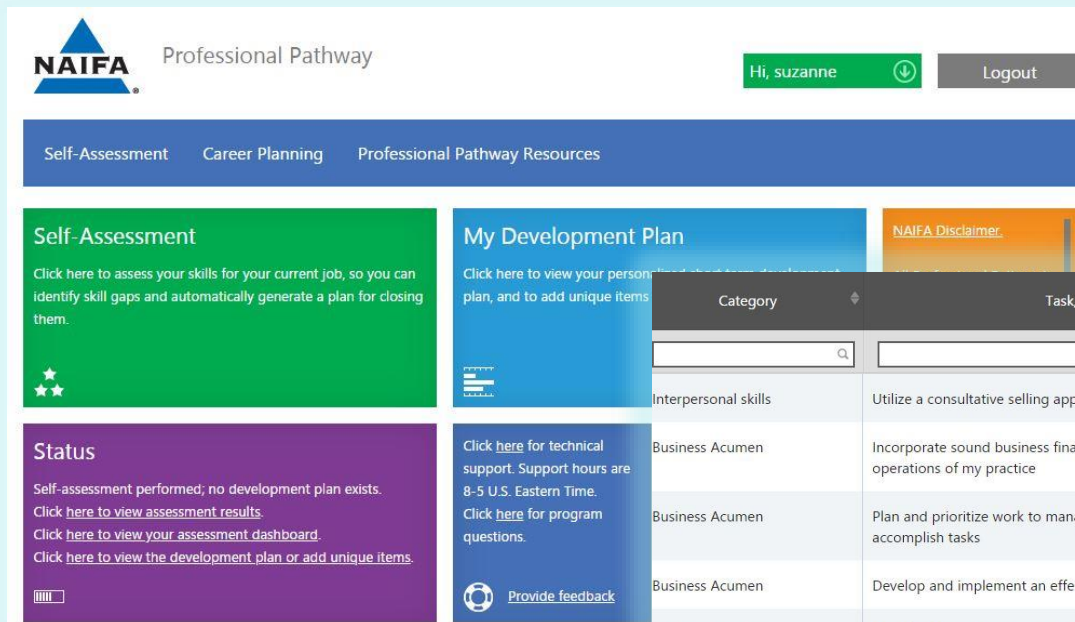
# Educate

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



The dashboard features a top navigation bar with the NAIFA logo, the text 'Professional Pathway', a user greeting 'Hi, suzanne' with a download icon, and a 'Logout' button. Below this is a blue navigation bar with links for 'Self-Assessment', 'Career Planning', and 'Professional Pathway Resources'. The main content area is divided into three columns. The left column has a green 'Self-Assessment' section with a three-star icon and a purple 'Status' section. The middle column has a blue 'My Development Plan' section. The right column has an orange 'NAIFA Disclaimer' section. The 'Status' section contains text about the self-assessment and links to view results, the dashboard, and the development plan. The 'My Development Plan' section contains text about viewing the plan and adding items, and a 'Provide feedback' button.

[www.naifapathway.org](http://www.naifapathway.org)

Category	Task/Skill	Task Example	Min Value For Role	Self Rating	Gap Btwn Min & Rating
Interpersonal skills	Utilize a consultative selling approach to determine client needs	<a href="#">view</a>	3	1	-2
Business Acumen	Incorporate sound business financial planning principles in the operations of my practice	<a href="#">view</a>	3	2	-1
Business Acumen	Plan and prioritize work to manage time effectively and accomplish tasks	<a href="#">view</a>	3	2	-1
Business Acumen	Develop and implement an effective marketing strategy	<a href="#">view</a>	3	2	-1
Business Acumen	Identify innovative ideas to develop creative processes and solutions	<a href="#">view</a>	3	2	-1
Ethical and Legal Practices	Demonstrate ethical behavior in all situations	<a href="#">view</a>	3	2	-1
Ethical and Legal Practices	Maintain client confidentiality and privacy at all times	<a href="#">view</a>	3	2	-1

# 1<sup>st</sup> Interactive Competency Model

# National, Regional & Local CE- Based Meetings



## 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



## Publications



The screenshot displays the NAIFA Advisor Today website interface. The top navigation bar includes links for 'Home', 'Read the Latest Issue of Advisor Today!', 'March/April 2017 Advertisers', 'Archives & Subscribe', 'Advisor Today Blog', and 'About Us'. The main content area features several articles and sections:

- Current Issues:**
  - The Age Dichotomy** (April 18, 2017): Millennials and Boomers offer an opportunity to create financial products that respond to their aspirations ... [Read More](#)
  - Blind Man Selling Insurance?** (April 18, 2017)
  - The Many Uses of Life Insurance** (April 18, 2017)
- Advisor Today Blog:**
  - Black Americans More Likely to Buy Life Insurance Than the General Population** (April 19, 2017): Six in 10 Black American households (approximately 9.9 million) indicate they are fairly, or very likely to buy ... [Read More](#)
- NAIFA Introduces New "Take 3" Video Series** (April 10, 2017): NAIFA is always looking for new ways to communicate as effectively as possible with you, ...

On the right side, there is a sidebar with the NAIFA logo and a call to action: "From the best minds in the industry, the Advisor Today blog brings you the tools, ideas and techniques you need to build and enhance your financial practice. Learn more by clicking here!" Below this is a section for "MARCH/APRIL 2017 ADVERTISERS" featuring "Ohio National Financial Services" with the tagline "Life changes. We'll be there." and a "Podcast Series" section titled "Building a More Successful Practice" featuring an interview with Evelyn Gellar, President of Women in Insurance and Financial Services. A large "ADVERTISE HERE" banner is at the bottom right.

# Email Subscriptions



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## Communication Preferences

[scarawan@naifa.org](mailto:scarawan@naifa.org)

If this is not your email address, please ignore this page since the email associated with this page was most likely forwarded to you.

Uncheck the types of emails you do not want to receive:

☒ **Association Updates**

General updates on events, NAIFA news, awards, etc.

☒ **NAIFA Live**

Interested in NAIFA Live events

☒ **Advisors You Can Trust**

Receive updates on the latest news

# NAIFA Learning Center



[LOGIN: NAIFA LEARNING CENTER](#) | [VIEW CART](#)

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## Imagine the Possibilities

 **PLAY VIDEO**

**Exclusively For Members of NAIFA**

[COURSE DETAILS AND PRICING](#)

[www.naifalc.org](http://www.naifalc.org)



CLIENTCAST<sup>®</sup>

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Posted on November 18, 2018

## Join the first-ever *Real Wealth*® Advisor Symposium

Be a part of the inaugural event.

Madison, WI | April 29 – May 1, 2019



- Code: BRIE

SHOPPING FOR A DISCOUNT?  
look no further than

# NAIFA

Save \$200 upon registration for the *Real Wealth*® Advisor Symposium just for being a NAIFA member! Use code

**BRIE**

when registering to receive your discount!



Tom Hegna • Don Quante • Curtis Cloke • Sam Richter • Van Mueller  
Scott Bushkie • Harlan Accola • Ruth Driscoll • Jim Silbernagel • David McKnight



# LECP for Long Term Care



[About the Center](#)

[Founding Partners](#)

[Find a NAIFA Advisor](#)

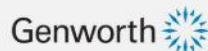
[Member Login](#)

[Get Started](#)

## NAIFA's Limited & Extended Care Planning Center


Comprehensive Resources for Long Term & Extended Care  
Planning

[Join the Center](#)





# ILTCI 2019 Conference



The screenshot shows the ILTCI 2019 Conference website. At the top is a green navigation bar with the ILTCI logo and links for Home, General Info, Registration, Hotel & Travel, Exhibit, Sponsor, and About Us. Below the navigation bar is a large banner image of a city skyline with the text "Imagine the Possibilities" and "19th Annual ILTCI Conference - March 24-27, 2019 - Chicago, IL". To the right of the banner are social media icons for LinkedIn and Twitter. Below the banner is a yellow section with the heading "Discover Expert Secrets at the ILTCI Conference". The text in this section describes the conference as a multi-disciplinary event held in Chicago, featuring expert-led discussions, breakout sessions, and customized workshops. It highlights the opportunity to network with industry leaders and learn firsthand about various topics including finance, claims, marketing, and public policy.

**ILTCI** Home General Info Registration Hotel & Travel Exhibit Sponsor About Us

## Imagine the Possibilities

19th Annual ILTCI Conference - March 24-27, 2019 - Chicago, IL

### Discover Expert Secrets at the ILTCI Conference

Hosted in Chicago, this year's annual ILTCI Conference is not one to miss, with expert-lead discussions, breakout sessions, and customized workshops. Come join us in powerful discussions lead by only the most influential and experienced industry experts across a variety of disciplines. Here, you'll learn firsthand everything you need to know about a variety of topics, from finance, to claims, marketing, public policy, and so much more.

A truly immersive experience, you'll also have ample opportunity to network with industry leaders, peers, and executives alike. Additionally, there will be allotted time to learn firsthand in customized workshops and engage in deep discussion via intimate breakout sessions.

This conference is truly the most multi-disciplinary LTC event you'll find anywhere in the country, with the largest collection of power players in this space.

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.



# Find an Advisor You Can Trust

Now, more than ever, Americans need financial advice from a professional who understands their goals.

Find an Advisor

## Find an Advisor

If you're an advisor and would like to apply for NAIFA membership, contact us [info@naifa.org](mailto:info@naifa.org). Please let us know if you're already a member and have updates to your record.

City & State OR Zip Code

Westerville, OH

Radius

35 mi

Keyword

Search

143 RESULTS FOUND

### Aaron Forbes

283 South State St, Suite 102  
Westerville, OH 43081  
(614) 769-4383  
[Email](#) | [Directions](#)

0.53 mi

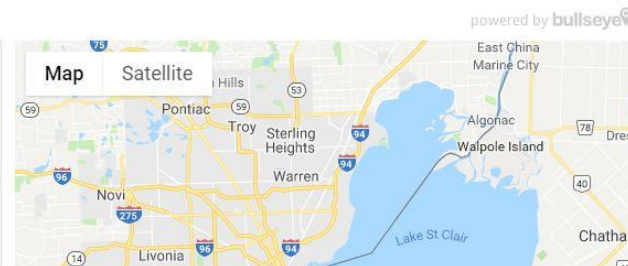
**Contact:**  
Buren Insurance  
Group  
Director of Sales &  
Marketing

### Holly Spann, ChFC, RICP, CLU

580 Office Parkway, Suite 130  
Westerville, OH 43082  
(614) 882-3276

1.04 mi

**Contact:**  
Holly Spann Agency



Consumer-  
focused site

# Advisors You Can Trust

- Make sure you're listed on [www.advisoryoucantrust.org](http://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







**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**