



Membership 

# Building a Successful Membership Program



*Growing NAIFA, Together!*

## Membership: A Paradigm Shift

- Flywheel Model
- Inbound vs. Outbound Marketing
- Prospecting/Lead Generation
- Referral & Testimonial Development from Members/Chapters
- Organized & Focused Campaigns
- Turnkey Tools and Resources – Make it Easy to Help
- Clearly Stated/Demonstrated ROI...with NUMBERS
- Development of Member Personas and Messaging

Acquisition



# Prospecting & Lead Generation

- Member-to-Prospect Referrals
- Social Media Marketing/Amplification
- Lookalike Audiences
- Ad Retargeting
- Drive to Blog Subscriptions/Content
- Trade Shows/Geofencing
- Future Leaders Program

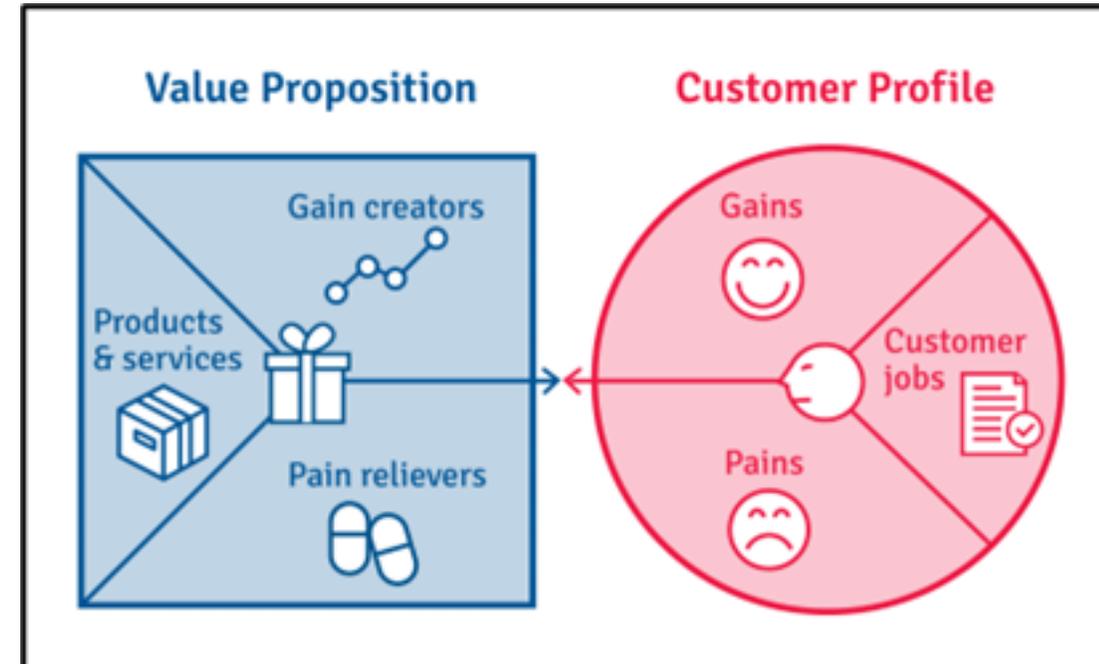


Acquisition



# Value Proposition

- Clearly, Simply, and more Effectively Explain NAIFA's Value Proposition
- Develop and Distribute Easy-to-Use Tools
- Developing Materials to Show the ROI/ Value of NAIFA Membership
- Distinguish Between Features and Benefits of Membership



Acquisition



# Value Proposition

- “Dollar Chart” Graphic to Show Where Your Dues Dollar is Spent
- Understanding what you are paying for and what you are getting from your dues dollar.
- NAIFA membership is a 3-in-1 proposition providing benefits at the local, state, and national levels.
- 1/3 of all expenses are protecting your industry from government intrusion.



## WHERE YOUR DUES DOLLARS GO

### DISTRIBUTION BY MEMBER SERVICE

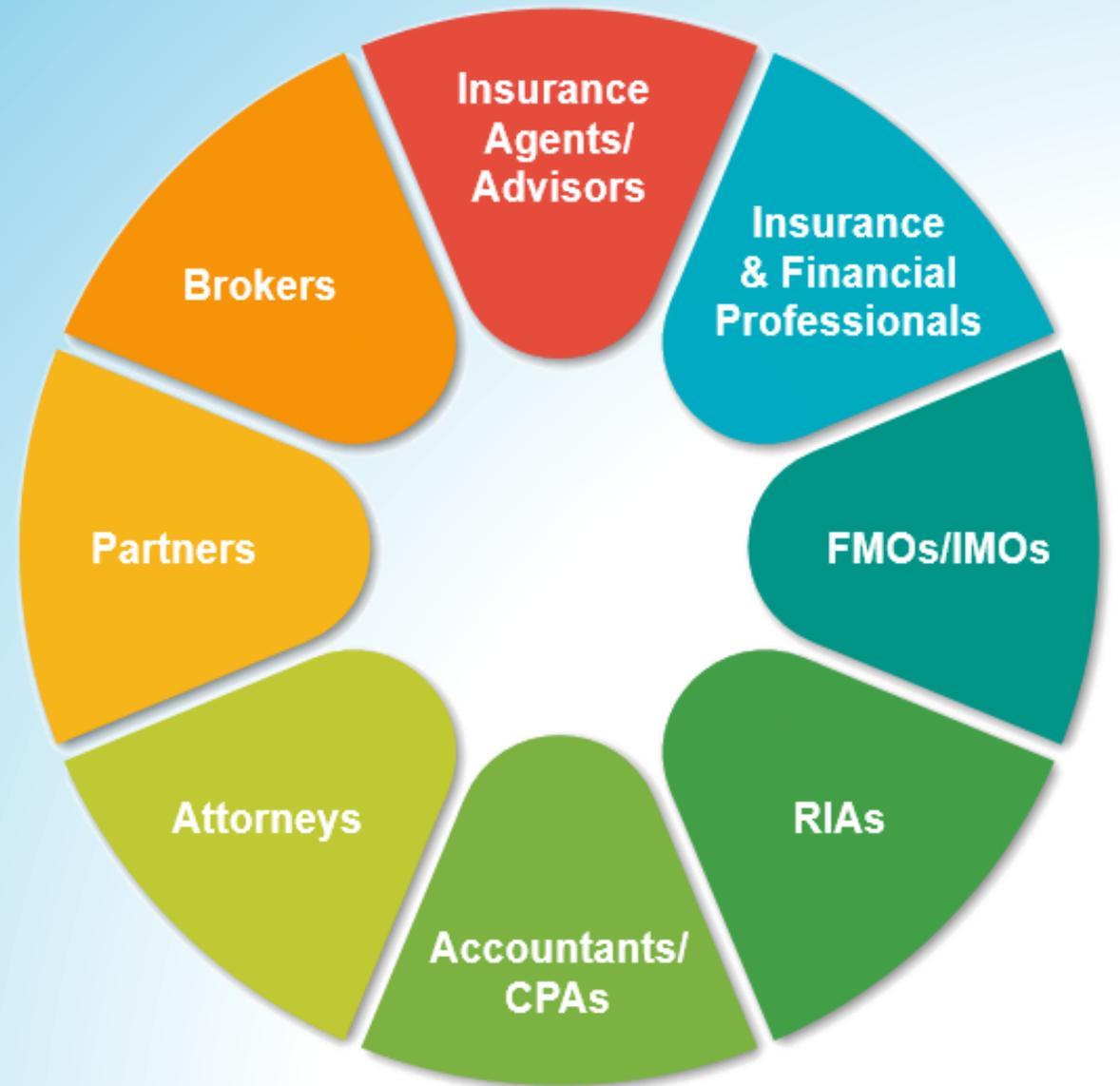


### DISTRIBUTION BY JURISDICTION LEVEL



**NAIFA Serves the  
Whole Financial  
Service Profession**

**NOT JUST  
A SLICE**



Acquisition



# Member Personas

- Generalized categories of members with similar interests, needs, and preference sets
- Enables us to better target our messaging and communication to emphasize the elements of our value proposition of greatest interest to them
- Member personas continue to evolve over time to reflect additional understanding of these groups and their wants/needs



Acquisition



# Membership Campaign



## The Membership Experience for Financial Advisors

When you join NAIFA, you don't just join an organization. You become part of an experience. Don't miss out on everything that membership to NAIFA has to offer.



Why NAIFA?

Member Testimonials

# NAIFA's **Three Key Initiatives** Meet Today's and Tomorrow's Marketplace Needs

**Advocate.**

**Legislative and  
Regulatory  
Concerns**

**Educate.**

**Resources to Grow  
and Thrive in your  
Business**

***Differentiate.***

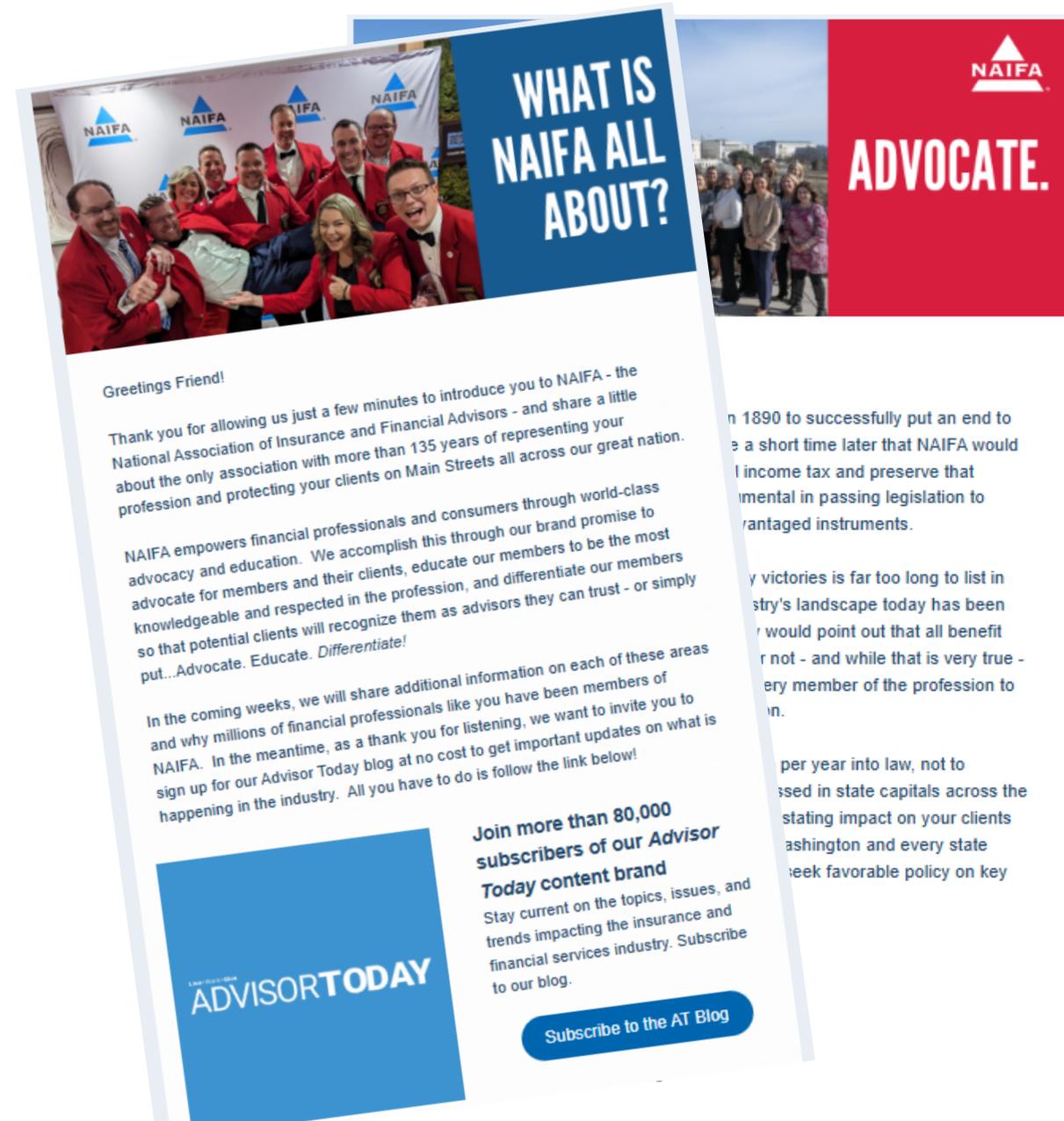
**Programs that Help  
Advisors Stay in  
Business and Rise  
Above the Rest**

# HubSpot

- HubSpot is our customer relationship management (CRM) tool to both capture and communicate with 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.

# Lead-Nurture Funnel

- Prospective members are identified and loaded into the NAIFA Membership Sales Pipeline.
- The prospects then receive a series of 6 emails, dripped out over the next 84 days.
- The first email is an introduction to NAIFA, the second about advocacy, the third about education, the fourth about differentiation, the fifth attempts to close by inviting them to be a part of something bigger, and the sixth again attempts to close by highlighting the power of the combined benefits.
- Each prompts them to engage a feature of membership and offers the opportunity to join.
- Live calls to close the membership sale follow the campaign.



**WHAT IS NAIFA ALL ABOUT?**

**ADVOCATE.**

**ADVISORTODAY**

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. Subscribe to our blog.

[Subscribe to the AT Blog](#)

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. All you have to do is follow the link below!

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...l income tax and preserve that  
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...antaged instruments.

...y victories is far too long to list in  
...stry's landscape today has been  
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...ery member of the profession to  
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...per year into law, not to  
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...ashington and every state  
...week favorable policy on key



# Feathr

- 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.



The Membership Experience  
for Financial Advisors  
[LEARN MORE](#)



The Membership Experience  
for Financial Advisors  
[LEARN MORE](#)



The Membership Experience  
for Financial Advisors  
[LEARN MORE](#)



The Membership Experience  
for Financial Advisors  
[LEARN MORE](#)





# Individual Sales

- Prospect Conversion Drip Campaigns
- Agency Presentations
- Expanding Influencer Network, engaging the full spectrum of financial services.

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

\*plus \$2 processing fee

**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 leadership you can have a part in directly shaping  
Gain access to educational webinars, meeting invites, obtain CE credit, & special interest practice communities  
Includes a membership benefit bundle: access to Life Happens content, insurance plans, business software & clothing discounts and more  
National network of over 20,000 multidisciplinary professionals united by commitment to clients, communities & country

**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**

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

[www.naifa.org/join](http://www.naifa.org/join)

### Financial Service Professional Membership

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

▲

**\$72/month\***

Licensed For  
Five Years+

\*plus \$2 processing fee per month

**Associate Membership**

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:**

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**\$50/Year**

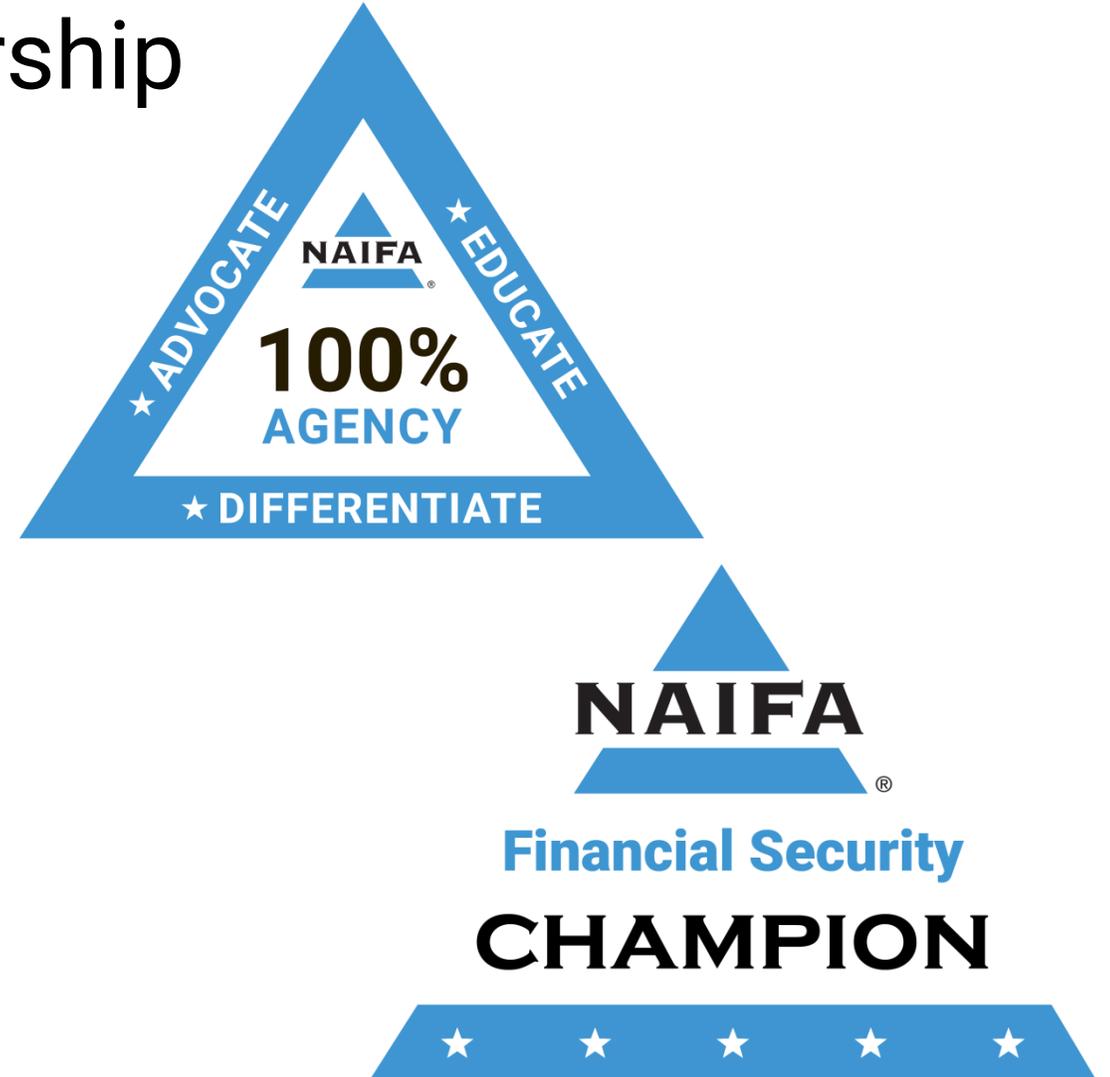
[Join Now](#)

Acquisition



## Group Membership Sales

- Defined parameters for group membership deals to ensure consistent pricing principles that prioritizes revenue along with member count.
- Implementing contract management process to assess and update contracts as necessary and to build in a process for regular pricing increases.
- Building a pipeline for lead acquisition and the sales process.
- Obtain referrals from members.



# Gwenn Marsh

## Senior Director of Group Membership Sales

We are pleased to announce that Gwenn Marsh has joined our team as Senior Director, Group Membership Sales, reporting to Brian Steiner, Vice President, Business Development & Partner Relations and Executive Director, Life Happens.

A graduate of the University of Central Florida with a Master of Business Administration, Marketing, and Finance, and a Bachelor of Science in Marketing, Gwenn has extensive sales, marketing, leadership, and consulting experience in the financial services and association space.

She's run her own consulting business for the past two years and has held positions with the American Retirement Association, FIS, BPAS, Autonomy, AST Equity Plan Solutions, Poorman-Douglas, the AICPA, ADP, and AAA. She's also held volunteer leadership positions with Juvenile Diabetes Research Foundation, Manhattan Society (New York City Multiple Sclerosis fundraising group), UCF Alumni Association, and the American Cancer Society (Orlando chapter).

Gwenn is also a member of the Women in Pensions Network, volunteering on their Corporate Sponsorship Committee, and recently joined THE REAL Mental Health Foundation.





# OPERATION MEMBERSHIP



**Calls Every Monday from 4:00 – 4:15 PM Eastern**  
Chapter Executives and Membership Chairs Needed!!!  
*Chapters Who Participate Are Getting Results!*

# Chapter Membership Scorecard

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

# 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?	<p>Actively Encourage &amp; Grow Your Triangle Team Count = +1 point</p> <p>Identify &amp; Report Contacts in Colleges &amp; Universities for Future Leaders = +1 point</p> <p>Actively Promote Future Leaders and/or YAT Advisor Academy = +1 point</p> <p>Actively Promote National Quality Awards and/or AT Podcast = +1 point</p> <p>Active Member Awards/Recognition Program = +1 point</p> <p>Active YAT Committee = +1 point</p>
7	Did your Chapter Make Member Care & Expired Member Calls? (Power Hours, etc.)	<p>We made some of our calls = 1 point</p> <p>We made the majority of our calls = 2 points</p> <p>We made all of our Care Calls = 5 points</p> <p>We made all of our Care Calls &amp; Expired Calls = 8 points</p>

# 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
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- Scorecard data will be collected by the Chapter Services Team at the end of each quarter through a simple, online survey.
- Chapter Membership Chairs will be asked to coordinate with their Chapter Executives to ensure submission within 2 weeks of the close of each quarter.

# Chapter Membership Grant Program

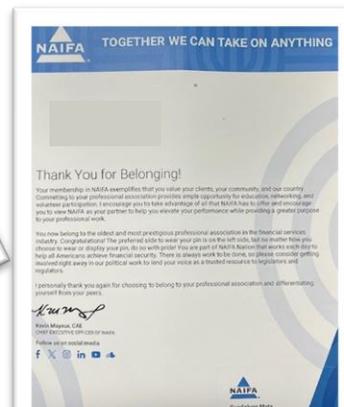
- **\$1,000 grant** to the top 5 scoring Chapters each quarter to further support their membership development and recruitment efforts.
- There will be a minimum point threshold to be eligible to receive the quarterly grant.
- There are no limitations on how many times a Chapter can receive the grant each year.
- Additional verification may be required from grant recipients.
- Grant program is subject to having increases in both grant amount and/or the number of awardees based on overall NAIFA membership growth.

# Welcome and Orientation

Onboarding



- Rapid deployment of welcome email and notification to the expanded Brand Ambassador Team (BAT) and Chapter(s) to reach out and engage.
- New members' kits sent out via direct mail.
- Invitation and automated registration for Member Orientation, as well as an on-demand option.



# Welcome and Orientation

Onboarding



**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!

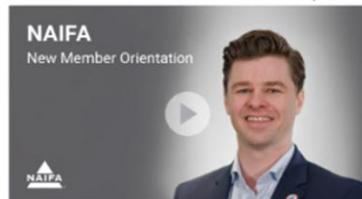
Welcome to NAIFA! You're now part of a powerful, nationwide community in the oldest and most respected association for financial professionals, where success is built on connection. Your membership opens the door to a network of peers who share your values, understand your journey, and are here to help 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 most Mondays at 3:00 PM ET for a guided walkthrough of NAIFA's top resources and tips for connecting with fellow new members.

Watch this short video about the new member orientation process.



[Register for Orientation](#)

**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 peer-tested techniques
- Gain more referrals
- Increased case size
- Boost client acquisition

### Top Resources You Can Use Now:

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

### Specialized Learning from Our Centers of Excellence:

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

### More Ways to Learn:

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

**Welcome to NAIFA**  
Differentiate

DIFFERENTIATE

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

## Stand out, Get Noticed

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

### Your NAIFA membership opens doors to:

- Visibility
- Credibility
- Marketing Tools

### Top Tools to Elevate Your Brand:

- [NAIFA Quality Awards](#)
- [Advisor Today](#)
- [Find a Financial Professional Directory](#)
- [Life Happens Marketing Content](#) (log-in required)
- [Member Spotlight](#)

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



[CONNECT NOW](#)

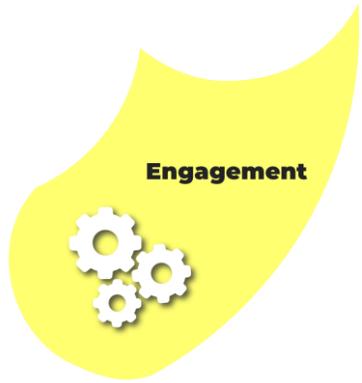
# Learning the Value of Government Relations Advocacy, Grassroots, and IFAPAC

Onboarding



Welcome to  
NAIFA Advocacy Video





# Young Advisor Team

- Future Leaders
- YAT Advisor Academy
- YAT Chats
- NAIFA Mentors
- Recognition



## Is a Career in Financial Services in Your Future?

FORMER NBA PLAYER TURNED FINANCIAL ADVISOR, CHRISTOPHER L. GANDY, INVITES YOU TO JOIN HIM ON WHAT CAN BE AN EXCITING AND REWARDING CAREER.

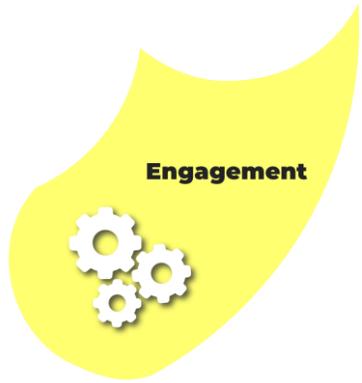


Young Advisor Team  
**LEADER OF THE YEAR**

Rick Demko,  
CLU, ChFC, RICP, AEP, LUTCF, LACP  
Cypress, Texas

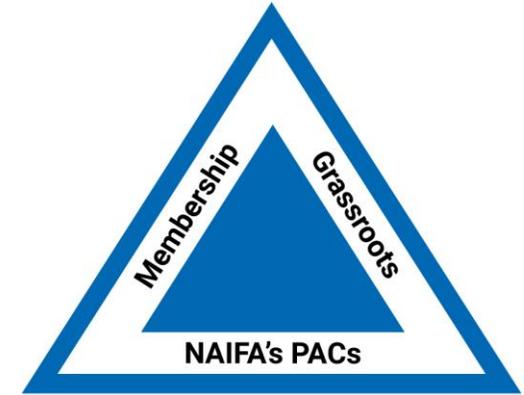


# MENTORS



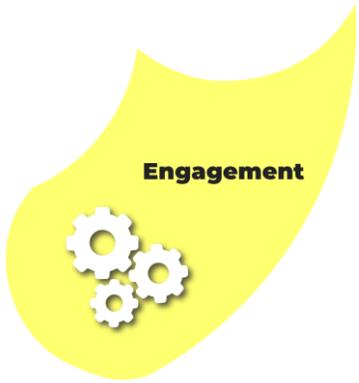
# Behavioral Recognition and Community

- **Triangle Team** – Simplifying and raising the bar on criteria.
- **Member Spotlight** – Member recognition and promotion program for engaged and supportive members.
- **Overachieve In Life** – Showcasing the unique nature, interests, and personalities of our members in a fun way.
- **Knowledge Centers** – Specialized hubs that provide industry professionals with targeted resources, expert insights, networking opportunities, and training in key financial services practice areas to support professional growth and best practices.



## TRIANGLE TEAM





# Community Awareness and Development

- Outreach to students in high schools, colleges, and universities to provide financial literacy education.
- Promote industry opportunities and awareness to cultivate future practitioners and members.
- Enhance and increase distribution through members to their communities.
- Explore opportunities to create content in cooperation with Life Happens that we can engage members to deliver in their communities to promote financial literacy and attract youth into the industry.



## Is a Career in Financial Services in Your Future?

FORMER NBA PLAYER TURNED FINANCIAL ADVISOR, CHRIS GANDY, INVITES YOU TO JOIN HIM ON WHAT CAN BE AN EXCITING AND REWARDING CAREER.



# NAIFA Quality Award

Engagement



The NAIFA Quality Award recognizes the best of the best in our industry. It celebrates outstanding advisors and agents who provide quality care, adhere to ethical standards, and is not solely based on annual production numbers.

Expanded promotion effort and simplified application process to generate greater participation and non-dues revenue.

## MEMBERSHIP REQUIREMENTS

In order to apply for the award an advisor must be a current NAIFA member by the closing of the application period. If your company provides NAIFA with a list of potential qualifiers, NAIFA will confirm the membership requirement. There is an application fee of \$50 per application for NAIFA members and \$75 for non-members. NAIFA will coordinate with any company wishing to cover the application cost for your representatives.



**Stay Tuned! The 2025 NQA Online Application Cycle Will Open Soon.**



Life Insurance



Multiline



Financial Advising



Health and Employee Benefits



- PropFuel uses email, your website, and SMS to transform traditional broadcast communications into interactive conversations by asking questions and capturing insights directly from your members.
- By facilitating personalized, two-way interactions, PropFuel helps associations better understand and address individual member needs, enhancing engagement and fostering stronger relationships.

Hello ,

Your National Association of Insurance and Financial Advisors membership has now lapsed. We understand if you've been busy and missed our renewal messages! There's still time to reinstate your membership and remain part of our community.

Are you planning to reinstate your membership?

Yes!

Maybe, I haven't decided yet.

No, I won't be rejoining this year.

If you intentionally let your membership lapse, please let us know so we aren't left wondering. We've missed you lately!

Sincerely,

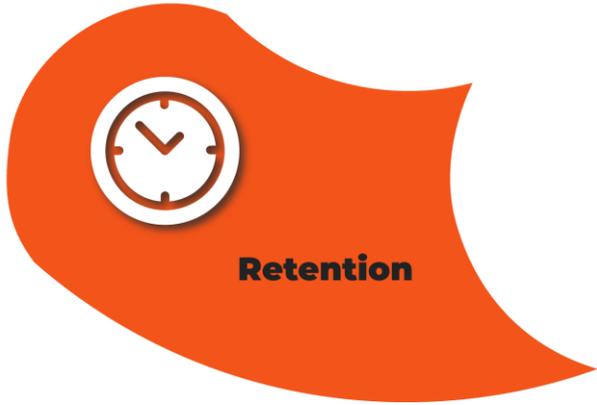
Javis Ogden  
Membership Sales Manager  
National Association of Insurance and Financial Advisors

Please do not forward this email

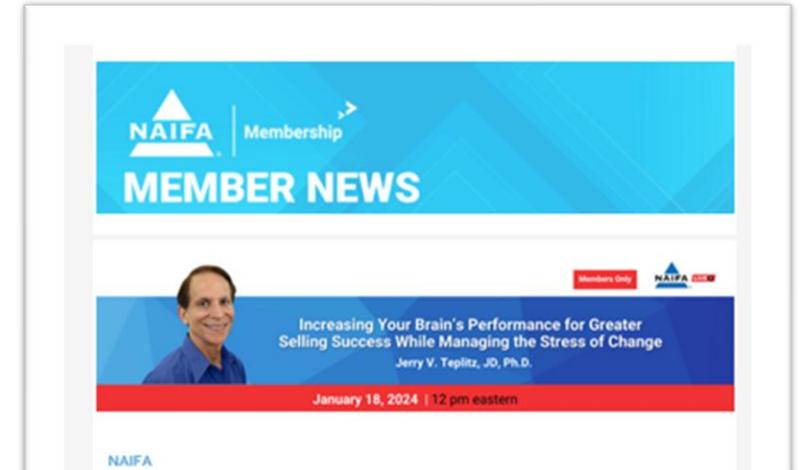
Can't get the button to work? Copy and paste this link:  
<https://app.propfuel.com/checkin/27c8ec7d-3918-458c-99a3-210eb62b1964>

[Unsubscribe](#)

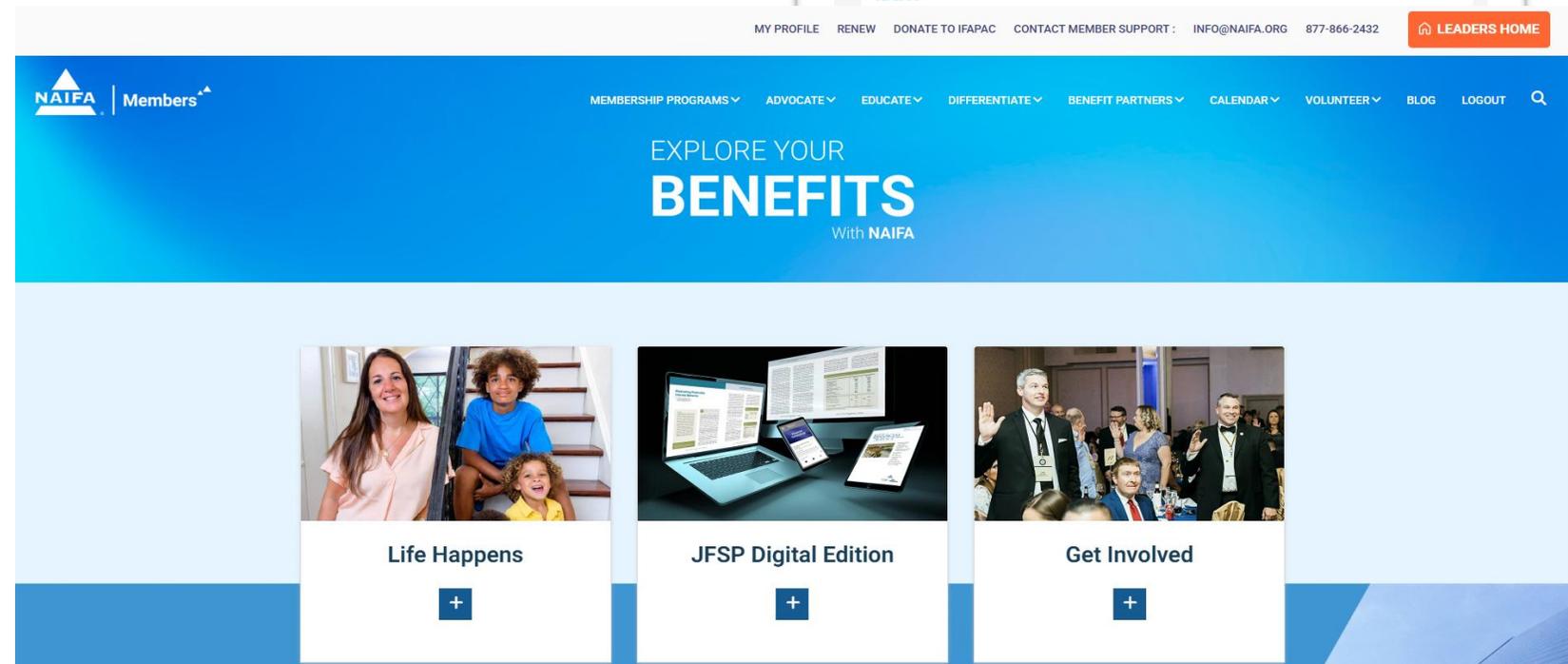
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# Member News and Benefits



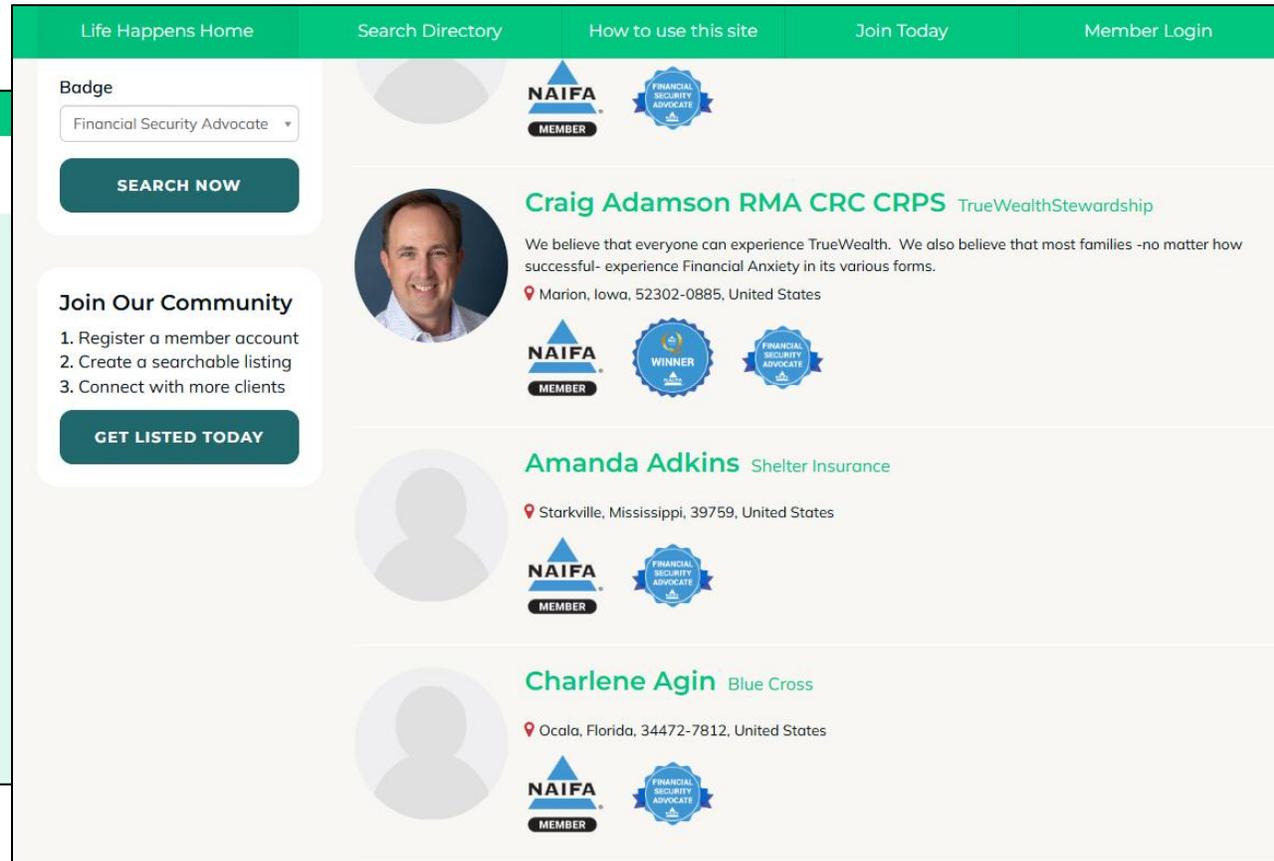
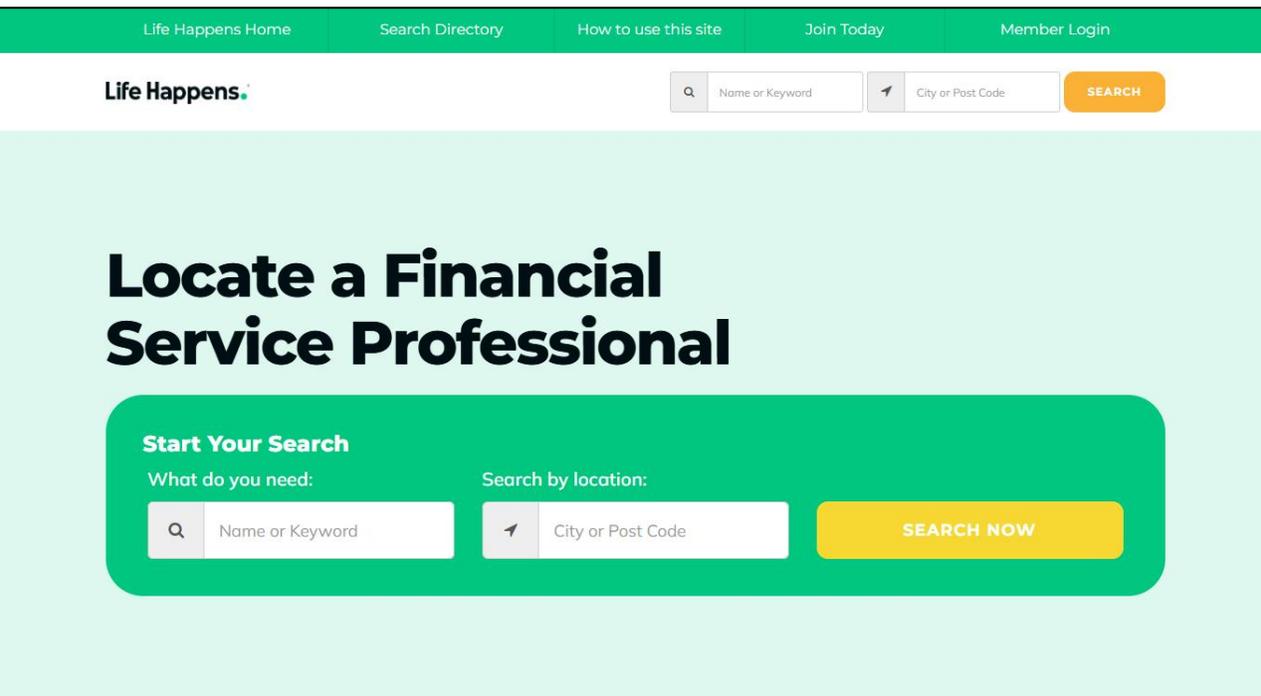
- **Member News** – Weekly email communication on current news, issues, and content offering in one convenient message, along with featured benefits.
- **Benefits Website** – One-stop location for members to access the benefits of membership. Need to find a way to make it exclusive.





# Enhanced “Locate a Financial Service Professional”

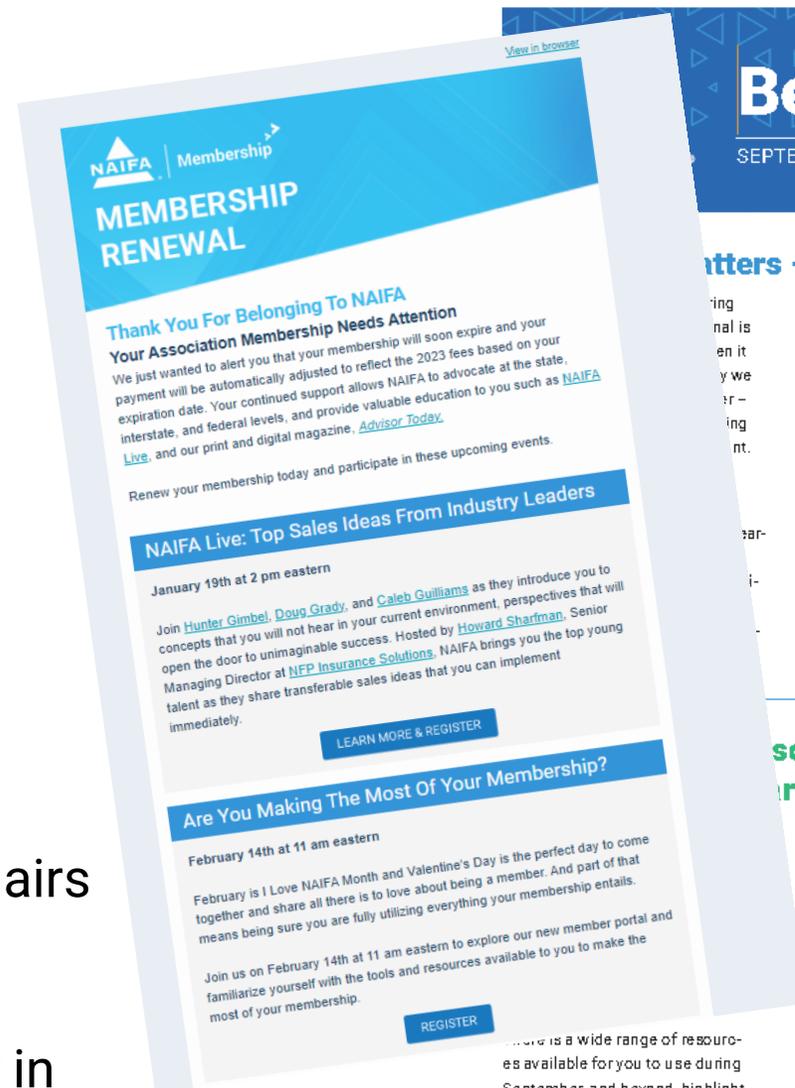
- Leverages the power and reach of the Life Happens brand.
- Unifies all member search functions under a central repository.
- Eliminates cumbersome and unutilized community functionality.





# Renewals

- A comprehensive renewal process that includes direct mail, voicemails, emails, and when necessary, text messaging.
- Close coordination and cooperation with Chapters and Chapter Membership Chairs on retention.
- Dedicated digital call lists for each Chapter in GoogleDocs, maintained by HQ.



## Letters – Be Ready to Vote!



This year, **New Jersey and Virginia** are holding state elections, and every vote will shape the future of our profession and the clients we serve. ▲

Visit NAIFA's GOTV site today:  
gov4financialsecurity.org



Stay informed. Stay engaged.  
**And most importantly – Vote!**

that impact your business and your clients.

- Access **resources and tools** to help you stay engaged in the democratic process.

## Resources Are Here for September's Awareness Month

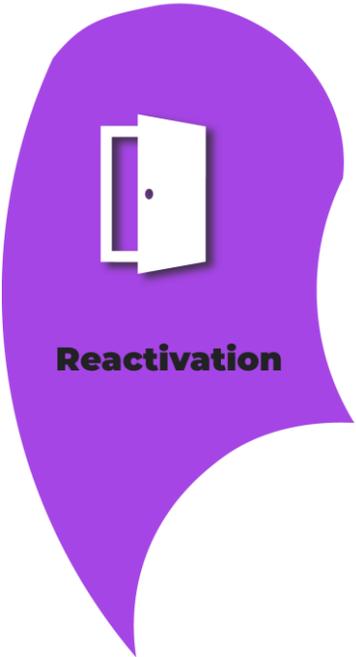


So be sure to take full advantage of your NAIFA membership and use September's LIAM campaign to reach out to your clients and prospects and help them get the coverage they need. You can access it all through the NAIFA Member Portal. ▲

on the basic need for coverage and are perfect for educational outreach and social media. And one of the most effective ways to convey the power of life insurance is through Real Life Stories, which show the real impact and necessity of it.

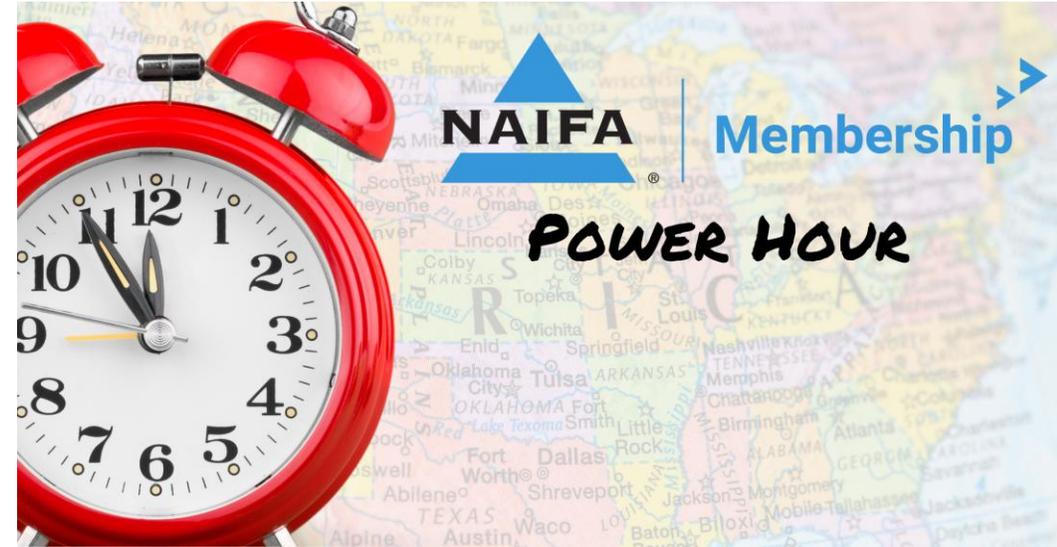


There is a wide range of resources available for you to use during September, and beyond, highlighting this year's LIAM theme: *Take control of your financial future with life insurance.* The resources focus



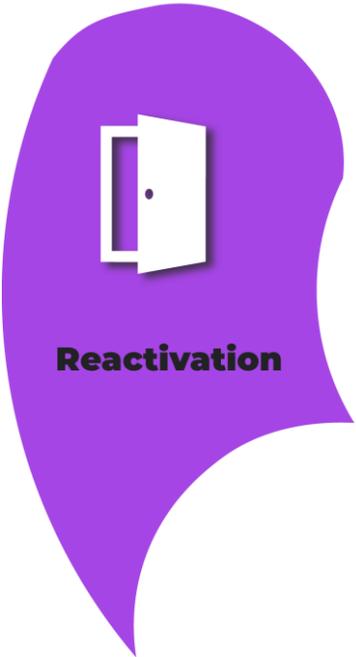
# Membership Power Hours

- Chapter-based Membership Power Hours, with scripts, content, and lists generated and tracked by HQ and supported with HQ staff, along with Chapter Leaders and volunteers.



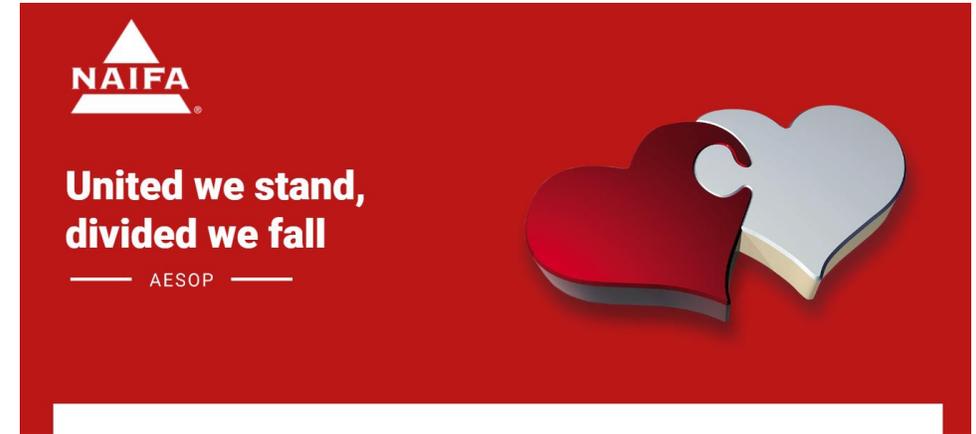
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	Contact	Date Last Contacted	Status	First_Name	Nickname	Last_Name	State_Chapter	Local_chapter	Local_Affiliate	Member_PREFERRED_Phone	Email_Address
1			2-Lapsed	Mark	Mark	Thomas	Pennsylvania	None	PA-Greater Philadelphia	215-293-1223	mark.thomas@aon.com
2	Lapse Apr: Sherrie left vm	Emailed 5-1-25	2-Lapsed	Hampton	Hap	Durbin	Pennsylvania	None	PA-South Central	814-931-1483	hap@durbincompanies.c
3	Lapse Apr: Tracy Im 2/20, Tracy Im 12/12	Emailed 5-1-25 Emailed 12-12-24	2-Lapsed	Robert	Randall	Swank	Pennsylvania	None	PA-Northeast	570-654-1500	robert.swank@prudential
4	Lapse Apr: Sherrie left vm	Emailed 5-1-25	2-Lapsed	Roger	Roger	Zahn	Pennsylvania	None	PA-Southwest	412-837-4295	zahn.roger@principal.co
5	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	Steven	Steven	Seide	Pennsylvania	None	PA-Greater Philadelphia	610-280-9330	sms@seidefinancial.com
6	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 Emailed 12-12-24	2-Lapsed	Marc	Marc	Hembrough	Pennsylvania	None	PA-Greater Philadelphia	484-328-3590	marc@whartonbusinessc
7	Lapse Apr: Sherrie left vm	Emailed 5-1-25	2-Lapsed	Thomas	Thomas	Vickers	Pennsylvania	None	PA-Greater Philadelphia	610-627-5566	tvickers@fpawealthmgmt
8	Lapse Apr: Bronwyn 2/20 said best to reach by email. sent email	Emailed 5-1-25	2-Lapsed	Douglas	Douglas	Dillmuth	Pennsylvania	None	PA-Northeast	570-296-8591	doug.dillmuth.bvj9@state



# Win-Back Campaigns

- Planned, prepared, and organized Win-Back campaigns with turnkey resources and coordinated messaging in collaboration with Chapters.



**We Belong Together. Come Back To NAIFA.**

A New Congress Needs NAIFA

Excel spreadsheet interface showing a file named 'Pennsylvania.xlsx' with various menu options and a toolbar.

	B	C	D	E	F	G	H	I	J	K	L
1	Contact	Date Last Contacted	Status	First_Name	Nickname	Last_Name	State_Chapter	Local_chapter	Local_Affiliate	Member_PREFERRED_Phone	Email_Address
2			2-Lapsed	Mark	Mark	Thomas	Pennsylvania	None	PA-Greater Philadelphia	215-293-1223	mark.thomas@aon.com
3	Lapse Apr: Sherrie left vm	Emailed 5-1-25	2-Lapsed	Hampton	Hap	Durbin	Pennsylvania	None	PA-South Central	814-931-1483	hap@durbincompanies.c
4	Lapse Apr: Tracy lm 2/20, Tracy lm 12/12	Emailed 5-1-25 Emailed 12-12-24	2-Lapsed	Robert	Randall	Swank	Pennsylvania	None	PA-Northeast	570-654-1500	robert.swank@prudential
5	Lapse Apr: Sherrie left vm	Emailed 5-1-25	2-Lapsed	Roger	Roger	Zahn	Pennsylvania	None	PA-Southwest	412-837-4295	zahn.roger@principal.co
6	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	Steven	Steven	Seide	Pennsylvania	None	PA-Greater Philadelphia	610-280-9330	sms@seidefinancial.com
7	Lapse Apr: Jim, Left a vm for Marc, please email himScott: 12/12/24-not available. LM with front desk.	Emailed 5-1-25 Emailed 12-12-24	2-Lapsed	Marc	Marc	Hembrough	Pennsylvania	None	PA-Greater Philadelphia	484-328-3590	marc@whartonbusinessc
8	Lapse Apr: Sherrie left vm	Emailed 5-1-25	2-Lapsed	Thomas	Thomas	Vickers	Pennsylvania	None	PA-Greater Philadelphia	610-627-5566	tvickers@fpawealthmgmt
9	Lapse Apr: Bronwyn 2/20 said best to reach by email. sent email	Emailed 5-1-25	2-Lapsed	Douglas	Douglas	Dillmuth	Pennsylvania	None	PA-Northeast	570-296-8591	doug.dillmuth.bvj9@state
10	Lapse Apr: Sherrie left vm	Emailed 5-1-25	2-Lapsed	David	David	Ferrini	Pennsylvania	None	PA-Greater Philadelphia	814-947-8888	dferrini@comcast.com



**Together We Can Take On Anything**