NAIFA | Membership

Building a Successful Membership Program

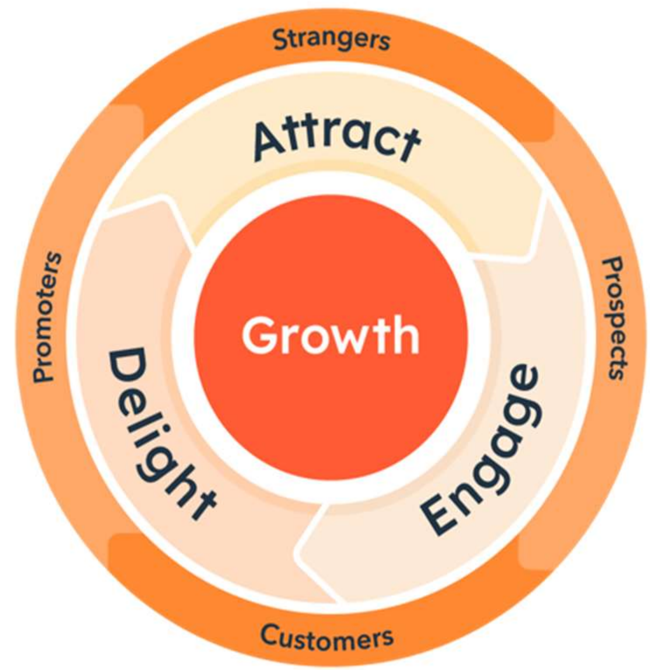
Growing NAIFA, Together!

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

Prospecting & Lead Generation

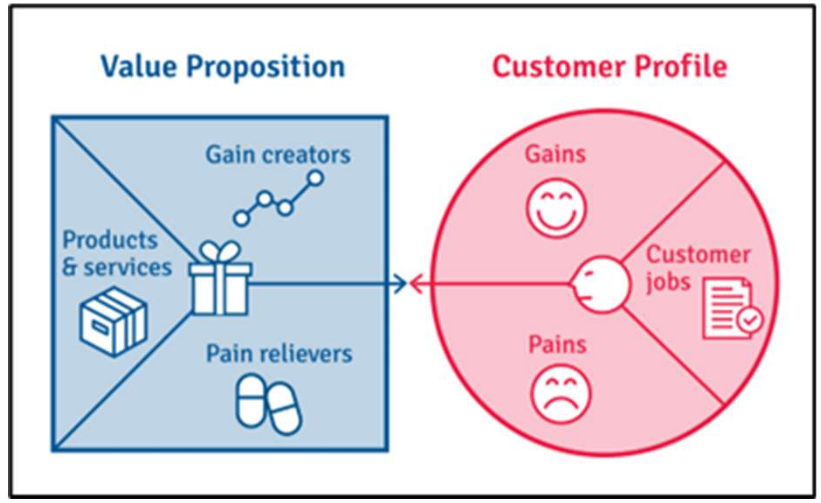
- Member-to-Prospect Referrals
- Social Media Marketing/Amplification
- Lookalike Audiences
- Ad Retargeting
- Drive to Blog Subscriptions/Content
- Trade Shows/Geofencing
- Future Leaders Program



NAIFA | Membership

Acquisition

Value Proposition

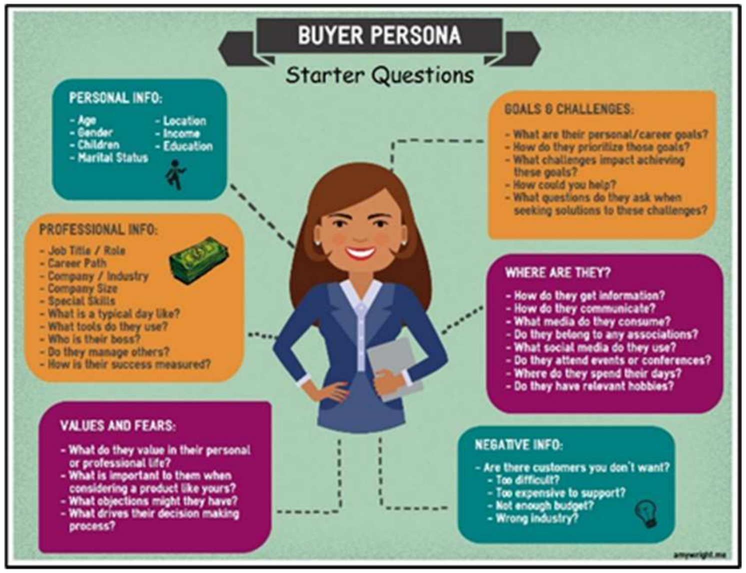


- Clearly, Simply, and more Effectively Explain NAIFA's Value Proposition
- Develop and Distribute Easy-to-Use Tools
- Creating "Dollar Chart" Graphic to Show Where Your Dues Dollar is Spent
- Developing Materials to Show the ROI/ Value of NAIFA Membership
- Distinguish Between Features and Benefits of Membership

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



NAIFA | Membership

Acquisition

Membership Campaigns

- Three Major Membership Campaigns:
  - ➢ ***Advocate*** will focus on the historic wins and upcoming battles that NAIFA faces to protect the financial services industry and our clients from governmental overreach and excessive taxation.
  - ➢ Will start ASAP and run through Congressional Conference
  - ➢ Four Goals: Join NAIFA, FSA Academy, Attend ConCon, and Subscribe to AIA Blog.

NAIFA | Membership

Membership Campaigns

- ***Differentiate*** will focus on how NAIFA members are distinguished from the field of nearly 1.5 million financial service professionals in the United States, making them more successful and putting more money in their pockets.
- Will start following Congressional Conference and run through the end of August.
- Four Goals: Join NAIFA, Life Happens Pro, Group Insurance Benefits, and Subscribe to AT Blog.

Acquisition

Membership Campaigns

- ***Educate*** will highlight the educational features and benefits that we have to offer prospective members, including certifications and other elements that make NAIFA members the best and brightest.
- Will start in September and run through the end of the year.
- Four Goals: Join NAIFA, LUTCF, Catalyst Program, and Register for Free CE Webinar.

Acquisition

Individual Sales

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

NAIFA

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 entirety 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. Choose monthly or annual plan during sign-up process.

$20/month	$30/month	$40/month	$50/month	$70/month*
Licensed For One Year	Licensed For Two Years	Licensed For Three Years	Licensed For Four Years	Licensed For Five Years+

*plus $2 processing fee per month

Join Now

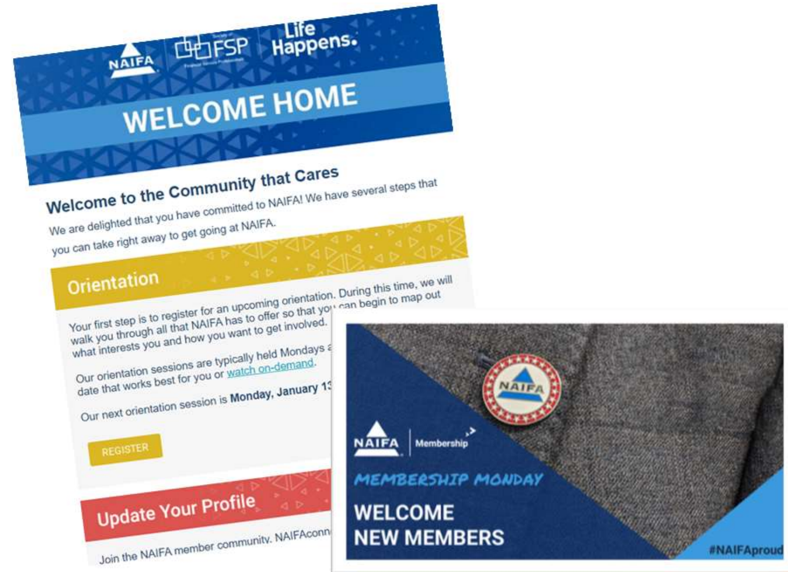
Acquisition

Group 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 sales process.
- Obtain referrals from members.

Welcome and Orientation

- Rapid deployment of welcome email and notification to 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.



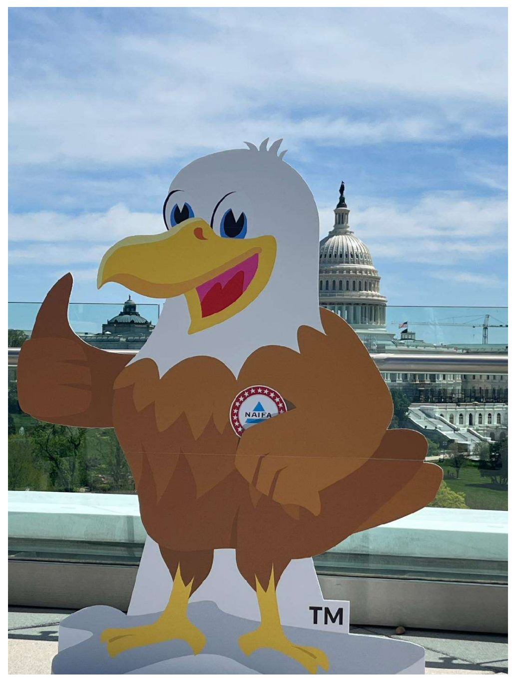
NAIFA | Membership

Onboarding

Learning the Value of Government Relations

Advocacy, Grassroots, and IFAPAC

Welcome to
NAIFA Advocacy Video



NAIFA | Membership

Engagement

- Refreshed format, anchored by Chris Gandy with rotation of member and staff cohosts.
- Organized production schedule with speaker tracking and staff management.
- Developing promotion campaign to attract prospects for lead generation.

Becoming a Successful Financial Advisor With Chris Gandy

TOPICS: PODCAST ADVISOR TODAY

Chris Gandy is the Founder of Midwest Legacy Group LLC, a boutique concierge insurance group for executives, professional athletes, physicians, business owners, and entrepreneurs. It focuses on the client's interests in wealth accumulation, wealth preservation, retirement strategies, insurance, asset protection, and investments.

Chris played professionally for the Chicago Bulls, the San Antonio Spurs, and in L'Hermaine, France, after playing for the Fighting Illini at the University of Illinois. After the NBA, Chris worked as a Representative for Northwestern Mutual Financial Network, the APEX Consulting Group LLC, and was the Senior Vice President of Sales at MassMutual Chicago.

NAIFA'S ADVISOR TODAY PODCAST SERIES
Becoming a Successful Financial Advisor With Chris Gandy
30 00:00:02 30

Apple Podcasts | LISTEN ON Spotify | LISTEN ON STITCHER | Listen on Google Podcasts
LISTEN ON tunein | LISTEN ON deezer | LISTEN ON iHeart RADIO | LISTEN ON amazon music

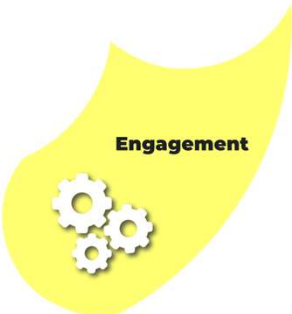
Engagement

Young Advisor Team

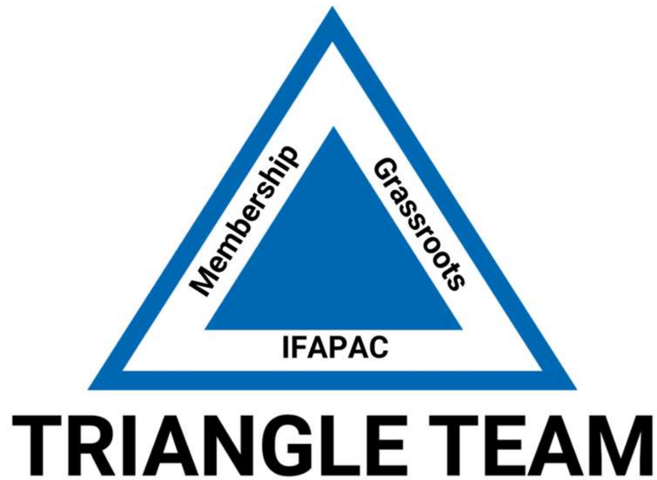
YAT Advisor Academy

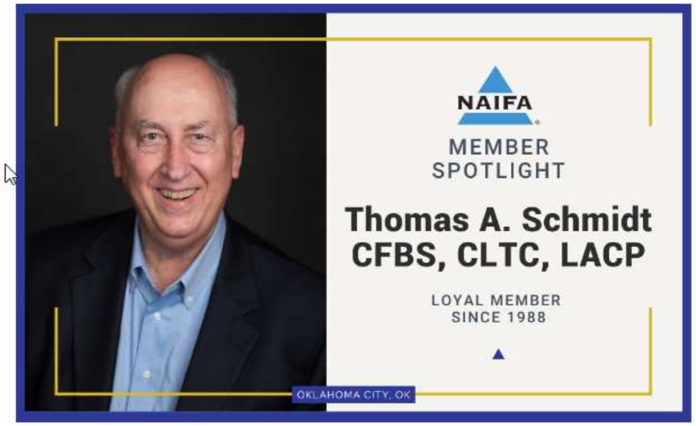
- 4-week program for deigned to aid new entrants to the industry in succeeding in the business.
- Engagement of candidates with a mentor as part of the NAIFA Mentor Loop program.
- Track retention in the industry and sell the benefits to managers, etc.

Behavioral Recognition and Community

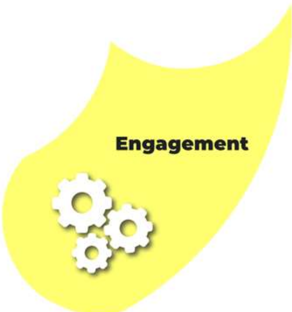


- **Triangle Team** – Simplifying and raising the bar on criteria.
- **Member Spotlight** – Member recognition and promotion program for engaged and supportive members.
- **Overachieve In Life** – Showcasing the unique nature, interests, and personalities of our members in a fun way.
- **Recruiter Recognition** – Member recognition for recruiting members each month, quarterly, and annually.





NAIFA | Membership



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 | Membership

Engagement

NAIFA Quality Award

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.

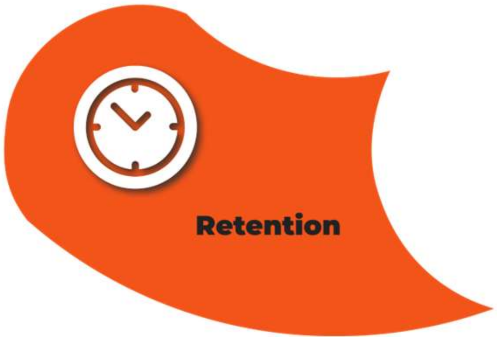
MEMBERSHIP REQUIREMENTS

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.

NAIFA QUALITY AWARD

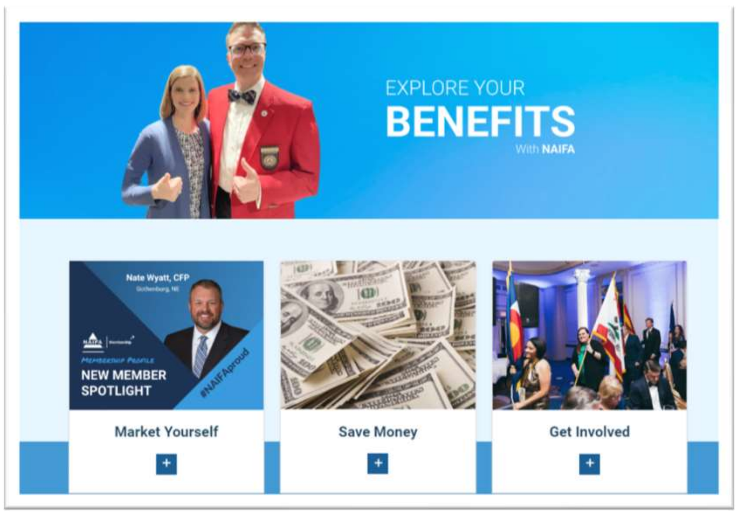
Stay Tuned! The 2025 NQA Online Application Cycle Will Open Soon.

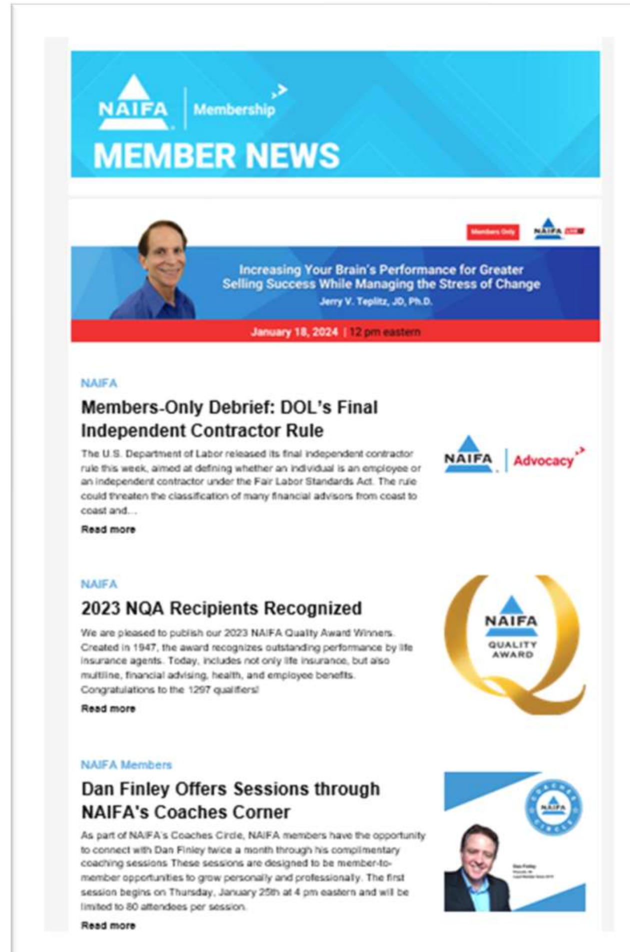
Life Insurance | Multiline | Financial Advising | Health and Employee Benefits



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.



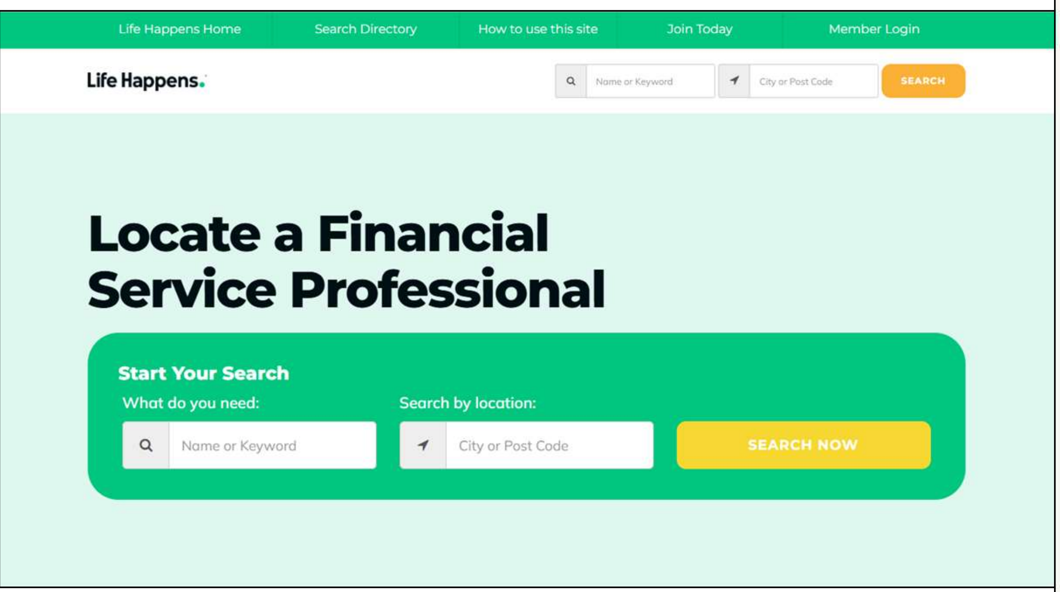


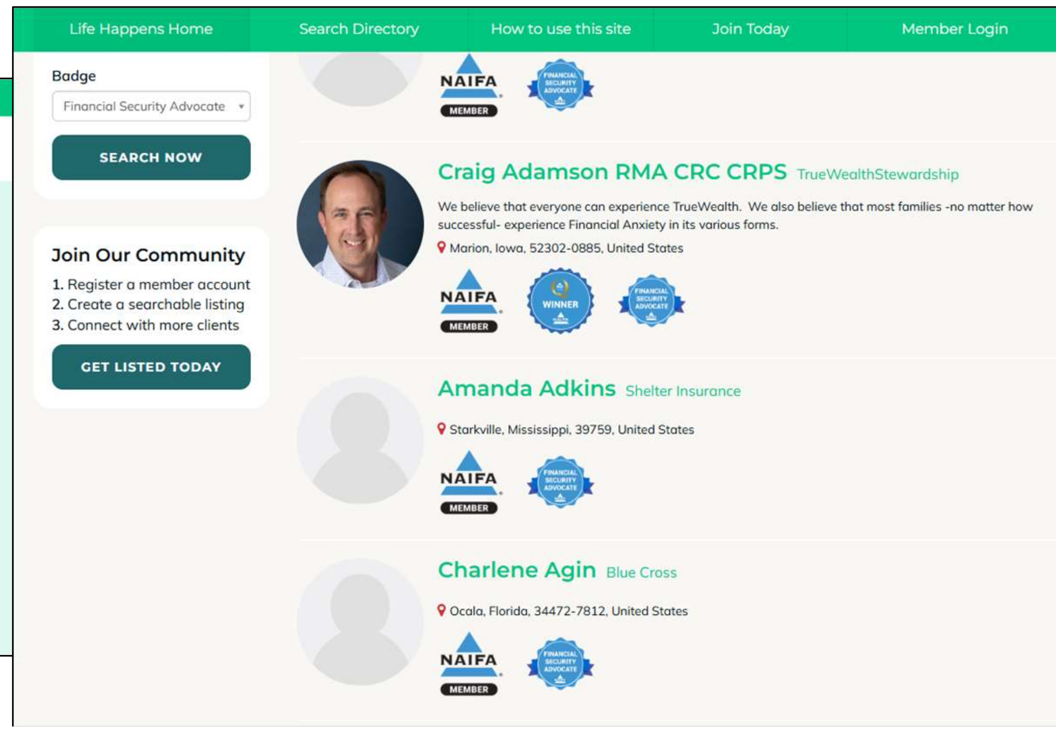
NAIFA | Membership

Retention

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.





Retention

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.


View in browser

NAIFA | Membership

MEMBERSHIP RENEWAL

Thank You For Belonging To NAIFA

Your Association Membership Needs Attention

We just wanted to alert you that your membership will soon expire and your
payment will be automatically adjusted to reflect the 2023 fees based on your
expiration date. Your continued support allows NAIFA to advocate at the state,
interstate, and federal levels, and provide valuable education to you such as N
Live, and our print and digital magazine, Advisor Today.

Renew your membership today and participate in these upcoming events.

NAIFA Live: Top Sales Ideas From Industry Leade

January 19th at 2 pm eastern

Join Hunter Gimbel, Doug Grady, and Caleb Guilliams as they introduce
concepts that you will not hear in your current environment, perspective
open the door to unimaginable success. Hosted by Howard Sharfman,
Managing Director at NFP Insurance Solutions, NAIFA brings you the t
talent as they share transferable sales ideas that you can implement
immediately.

LEARN MORE & REGISTER

Are You Making The Most Of Your Members

February 14th at 11 am eastern

February is I Love NAIFA Month and Valentine's Day is the perfec
together and share all there is to love about being a member. And
means being sure you are fully utilizing everything your members

Join us on February 14th at 11 am eastern to explore our new m
familiarize yourself with the tools and resources available to you
most of your membership.

REGISTER


NAIFA **Monthly Newsletter**

Kathleen Owings Named 2024 YAT Leader of the Year

NAIFA is thrilled to announce that Kathleen Owings has been named the 2024 Young Advisor Team Leader of the Year. This award celebrates outstanding leadership, dedication, and impact within the financial advisory industry, recognizing individuals who exemplify the highest standards of excellence.

Kathleen Owings, a 2000 graduate of the United States Military Academy at West Point, began her career as an active-duty officer in the Army Corps of Engineers, earning the Bronze Star for meritorious service in a combat zone. She served at Fort Hood, TX, Fort Carson, CO, and overseas on multiple tours of duty.

Kathleen began her career in the financial services industry in 2007 and is one of the owners of Westbilt Financial Group in Colorado Springs, CO. She truly believes that being a financial advisor is her calling, not just a job. Kathleen is also the author of Put Your Money to Work: A Woman's Guide to Financial Confidence, empowering women to take control of their financial futures.

Kathleen has also served in many leadership roles with NAIFA including past president of NAIFA-Colorado. She is a graduate of NAIFA's LILI program. Additionally, Kathleen actively participates in her local Pikes Peak community, serving on the Pikes Peak Library District Board and supporting other charitable causes.

Kathleen is the daughter of Robert Quinlan, LUTCF, MBA, a loyal NAIFA member since 1991, who resides in New York. Robert and Kathleen's mother, Alice, will be at the 2024 National Leadership Conference, on September 21, 2024, in Phoenix, AZ to applaud their daughter for achieving this national recognition from NAIFA.

NAIFA Hall of Fame Inductees

by Tom Cothron, LUTCF, FSS
NAIFA President

The NAIFA Board of Trustees has authorized the creation of the NAIFA Hall of Fame to honor extraordinary NAIFA members from throughout the association's history. NAIFA members and other interested parties may nominate current NAIFA members or past members who have retired or who have passed away.

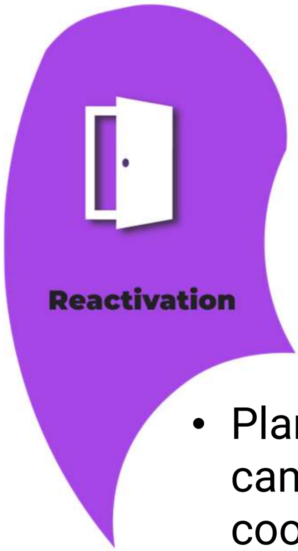
I am delighted to announce our inaugural class of our Hall of Fame inductees:

- C. Robert Brown, Senior, CLU, LUTCF
- Norman G. Levine
- Ellen M. Putnam, CLU
- Colonel Chauncey Munroe Ransom
- Edward A. Woods

We will celebrate this class and this newly formed body at our upcoming Apex and National Leadership Conference which will be held September 19-21,2024 at the iconic Arizona Biltmore resort.

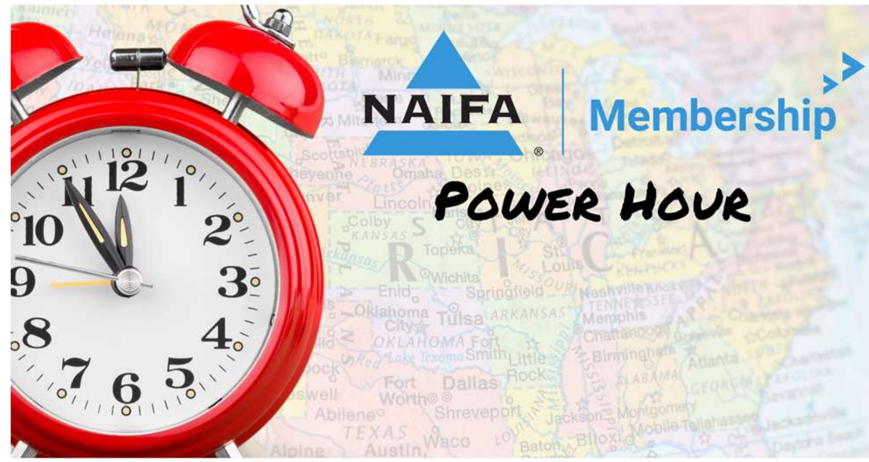
This class was selected through hard work by a volunteer committee based on selection criteria created by the same committee. We will accept nominations for future Hall of Fame classes going forward and we thank you for your leadership.

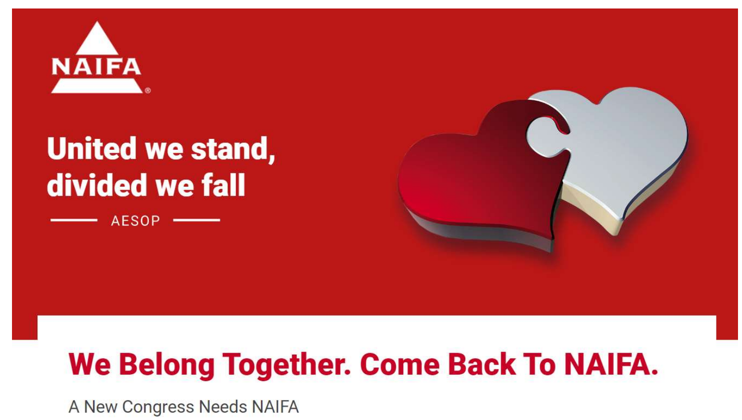
If I won't see you in Arizona, I do want to tell you how much I appreciate your



Win-Back Campaigns and Power Hours

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





2025 Membership Committee

NAIFA® | Membership

Executive Committee Liaisons

- **Doug Massey**, 2025 President
- **Christopher L. Gandy**, 2026 President

Trustee Liaisons

- **Dennis Cuccinelli**, Member Acquisition
- **Carina Hatfield**, Member Retention

Committee Co-Chairs

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

Member Acquisition Vice Chairs

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

NAIFA® | Membership

- **Chris Bor**, Vice Chair of Chapters Sales & Distribution
  cbor23@gmail.com | 925-348-4241

  - **Mimie Yoon Lee,** Associate Vice Chair of Chapter Sales for Peter Browne Cohort
    myoonlee11@gmail.com | 925-235-9380

    Arizona, California, Florida, Georgia, Illinois, Massachusetts, Michigan, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Tennessee, Texas, Virginia, and Washington

  - **Jennifer Hodges**, Associate Vice Chair of Chapter Sales for Juli McNeely Cohort
    jennifer@goclarity.com | 417-840-0465

    Alabama, Arkansas, Colorado, Connecticut, Indiana, Iowa, Kentucky, Louisiana, Maryland, Minnesota, Missouri, Nevada, Oklahoma, Oregon, Puerto Rico, South Carolina, Utah, and Wisconsin

NAIFA® | Membership

- **Steve Walker**, Associate Vice Chair of Chapter Sales for Jeff Taggart Cohort
  swalker@e4.insurance | 763-229-7507

  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**, Associate Vice Chair of Chapter Sales for John Newton Russell Cohort
  scott.blake@nm.com | 561-452-2841

  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

Member Retention Vice Chairs

- **Paul Szkotak**, Vice Chair of Onboarding, Retention, and Reactivation
  pmszkotak@ft.newyorklife.com | 609-332-7007
  - Onboarding Strategies
  - Welcome Outreach: Chapters & Brand Ambassador Team (BAT)
  - Group Membership Retention
  - Individual Membership Retention
  - Referral Recognition
  - Chapter Member Care Calls & Power Hours
  - Reactivation & Win-Back Strategies

- **Brian Haney**, Vice Chair of Engagement
  bhaney@thehaneycompany.com | 240-888-8630
  - Young Advisor Team (YAT)
    - YAT Advisor Academy
    - Future Leaders
  - Triangle Team
  - Member-to-Member Programs
  - National Quality Award (NQA)

NAIFA® | Membership

Professional Staff

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Vice President of Membership and Chapter Services

Michele Borsuk
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Senior Director of Membership

Zack Huels
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Director of Member Engagement

Javis Ogden
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Membership Sales Manager

Kevin Rara | krara@naifa.org
Membership Specialist

NAIFA®

Together We Can Take On Anything