



Purpose of This Guide

This guide equips NAIFA Chapters with a clear, practical roadmap for implementing the 2026 Membership Action Plan. It outlines Chapter-level responsibilities across the full membership lifecycle, including **acquisition**, **onboarding**, **engagement**, **retention**, and **reactivation** – so every Chapter can contribute to the national goal of **5% net growth** and help drive NAIFA toward doubling its membership.



The NAIFA Membership Flywheel

1. Acquisition: Fueling the Growth Flywheel

Chapter Objectives

- Generate a steady flow of qualified prospects.
- Actively engage, like, share, and comment on the [Experience NAIFA!](#) campaign.
- Ensure every prospect is asked to join.

Chapter Responsibilities

1.1 Lead Generation & Prospecting

- Build, maintain, and [share](#) with headquarters a local prospect list of financial professionals.
- Encourage members to submit referrals using simple, repeatable messaging.
- Promote NAIFA features (public-facing) and benefits (member-only) through Chapter channels.
- Identify and [share](#) with headquarters any opportunities for NAIFA to exhibit at industry events.

1.2 Support the “Experience NAIFA!” Campaign

- Share national campaign assets across Chapter newsletters, social media, and events.

- Align Chapter messaging with the national campaign phase focus:
 - **Jan–May:** Advocate (60%), Educate (20%), and Differentiate (20%)
 - **Jun–Sep:** Differentiate (60%), Advocate (20%), and Educate (20%)
 - **Oct–Dec:** Educate (60%), Advocate (20%), and Differentiate (20%)

1.3 Agency Presentations

- Identify agencies, firms, and broker-dealers in the Chapter footprint.
- Coordinate with NAIFA national staff to schedule and deliver presentations.
- Recruit and train local presenters using NAIFA's turnkey [slide deck](#).

1.4 Group Membership Development

- Identify potential [100% Agency](#), [Financial Security Champion](#), or custom group membership opportunities.
- Facilitate introductions between agency leaders and NAIFA national staff.

1.5 Influencer Networks

- Identify local industry influencers (trainers, coaches, MDRT leaders, etc.).
- Encourage them to share NAIFA content and invite their networks to experience NAIFA.

2. Onboarding: Setting Members Up for Success

Chapter Objectives

- Ensure new members feel welcomed, connected, and informed.
- Reinforce the value of NAIFA from day one.

Chapter Responsibilities

2.1 Chapter Welcome Outreach

- Contact every new member within seven (7) days of joining.
- Use consistent outreach method (email, phone, or handwritten note).
- Reinforce that membership includes **national, state, and local** benefits.

2.2 Brand Ambassador Team (BAT) Collaboration

- Identify and nominate Chapter BAT volunteers.
- Ensure BAT members reach out to new members promptly.
- Encourage BAT volunteers to invite new members to Chapter events.

2.3 Promote Orientation Opportunities

- Remind new members about national [orientation](#) sessions.
- Offer Chapter-level orientation touchpoints (e.g., “Meet NAIFA Locally” calls).

2.4 Advocacy Awareness

- Encourage new members to:
 - Join the [Advocacy Action Center](#).
 - Attend their State Legislative Day.
 - Become a [Financial Security Advocate](#).
 - Register for [Congressional Conference](#).

3. Engagement: Keeping Members Connected and Active

Chapter Objectives

- Increase participation in key programs by at least 10%.
- Strengthen relationships through meaningful, personalized engagement.

Chapter Responsibilities

3.1 Young Advisor Team (YAT) Development

- Recruit young advisors into YAT events and get them involved.
- Promote [YAT Advisor Academy](#) and [Future Leaders](#) programs.
- Support YAT-led events and leadership development.

3.2 Triangle Team Promotion

- Educate members on the updated [Triangle Team](#) criteria.
- Encourage participation by highlighting:
 - Membership recruitment.
 - Grassroots involvement.
 - NAIFA PACs support.

3.3 Member Spotlight Participation

- Nominate Chapter members for the national [Member Spotlight](#).
- Share spotlight features across Chapter communication channels.

3.4 Promote NAIFA Quality Awards (NQA) & Awards Program

- Encourage members to apply for [NQA](#) and other [awards](#).
- Highlight NQA recipients at Chapter meetings and online.

4. Retention: Ensuring Members Renew Year After Year

Chapter Objectives

- Achieve at least **90% annual retention**.
- Reduce avoidable lapses through proactive outreach.

Chapter Responsibilities

4.1 Monthly Member Care Calls

- Review the monthly 90-day renewal report.
- Assign volunteers to call members approaching renewal.
- Document concerns and share feedback with national staff.

4.2 Reinforce Member Value

- Regularly promote:
 - Member Benefits [website](#).
 - Life Happens “[Find a Financial Professional](#).”
 - Advocacy [wins](#).
 - Education and designation opportunities.

4.3 Streamline Chapter Communications

- Coordinate messaging with national communications.
- Avoid overwhelming members with excessive emails.

5. Reactivation: Winning Back Former Members

Chapter Objectives

- Achieve at least **20% reactivation** of lapsed members.
- Rebuild relationships with former members.

Chapter Responsibilities

5.1 Chapter-Level Reactivation Outreach

- Use monthly lapsed-member reports to assign outreach calls.
- Ask about:
 - Why they left;
 - What value they're missing; and
 - What would bring them back?

5.2 Membership Power Hours

- Host monthly (or at least quarterly) [Chapter Power Hours](#).
- Use national [scripts](#), lists, and tools.
- Invite national staff to support when helpful.

5.3 Support National Win-Back Campaigns

- Amplify national reactivation messaging.
- Encourage members to reach out to former colleagues.

6. Chapter Leadership & Accountability

Chapter Responsibilities

6.1 Appoint a Chapter Membership Chair

- Serve as the primary liaison with NAIFA national.
- Coordinate acquisition, onboarding, engagement, retention, and reactivation activities.
- Engage with Membership Committee Liaisons.
- Attend weekly [Membership Monday meetings](#).

6.2 Track and Report Progress

- Maintain simple dashboards or trackers.
- Share monthly updates with Chapter leadership and national staff.
- Submit quarterly updates using the [Chapter Membership Scorecard](#).
 - A \$,1000 grant will be awarded quarterly to the top five Chapters (state or local) that receive the highest scores on the Chapter Membership Scorecard, provided that their score is greater than 25 points.

6.3 Foster a Culture of Membership

- Encourage every board member to:
 - Recruit
 - Welcome
 - Engage
 - Retain
 - Reactivate

6.4 Celebrate Success

- Recognize:
 - Top recruiters.

- Triangle Team qualifiers.
- NQA recipients.
- YAT leaders.
- Highly engaged members.

7. Annual Chapter Membership Calendar

Month	Primary Focus	Chapter Actions
Jan–Feb	Advocacy + Acquisition	Promote Legislative Days, launch Experience NAIFA, and schedule agency presentations.
Mar–May	Advocacy Peak + Awards	Drive Congressional Conference attendance, push grassroots engagement, promote membership benefits, and awards programs.
Jun–Sep	Differentiate	Highlight member recognition, NQA, YAT programs, and In-District meetings.
Oct–Dec	Educate	Promote LUTCF, LILI, Knowledge Centers, and Protectors Conference.
Monthly	Ongoing	New member welcome, member care calls, Power Hours, and BAT outreach.

Conclusion

Chapters are the heart of NAIFA’s membership engine. By executing these responsibilities with consistency and enthusiasm, every Chapter becomes a powerful force in the national effort to grow, engage, and retain the NAIFA community. Remember...

**Together, We Can
Take on Anything!**