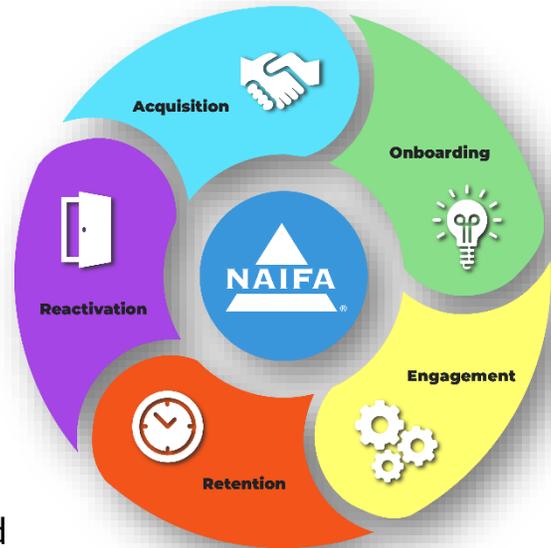




2026 Membership Action Plan Executive Summary

The NAIFA Membership Action Plan outlines a comprehensive system-based strategy to achieve at least **5% net membership growth** across all Chapters and nationally, with a long-term vision of **doubling the size of the NAIFA membership**. Grounded in the *flywheel philosophy* popularized in *Good to Great*, the plan aligns acquisition, onboarding, engagement, retention, and reactivation into a single, coordinated growth engine designed to build momentum, reduce friction, and drive sustainable results through collaboration among staff, Chapters, volunteers, partners, and members.



The NAIFA Membership Flywheel

At the core of the strategy is a renewed and disciplined **value proposition** centered on NAIFA's brand promise: **Advocate. Educate. Differentiate!** The plan emphasizes clarity over complexity, focusing on the benefits that most directly protect members' livelihoods, elevate professionalism, and set them apart in the marketplace. A year-long national marketing campaign, **Experience NAIFA!** will bring this promise to life by positioning membership as a career-defining professional experience, supported by phased messaging that aligns advocacy, differentiation, and education with NAIFA's annual activities and events.

Membership acquisition will shift away from ineffective broadcast tactics toward inbound marketing, targeted campaigns, and relationship-driven sales. Efforts include individual and Chapter-based outreach, agency presentations, group membership programs, and emerging influencer networks. A national prospect database and CRM-supported sales funnels will enable NAIFA to nurture qualified leads while maintaining long-term visibility with broader audiences. The plan reinforces a fundamental principle: people join because they are asked, especially by someone they know and trust.

Onboarding and engagement are prioritized as critical drivers of retention and lifetime membership value. Structured welcome communications, personal outreach from leaders and Brand Ambassadors, Chapter-level engagement, and

tangible welcome materials are designed to create an immediate sense of belonging. Ongoing engagement will be strengthened through programs such as the Young Advisor Team, Advisor Academy, Future Leaders, Triangle Team recognition, Member Spotlights, and the NAIFA Quality Award. NAIFA will also leverage **PropFuel** to enable two-way, personalized communication that captures member insights and delivers more relevant experiences throughout the membership lifecycle.

To support **retention**, the plan targets a best-in-class **90% annual retention rate** by reinforcing value through personalized member communications, an improved Member Benefits website, enhanced visibility through the Find a Financial Professional tool, and a proactive renewal process supported by Chapter member care calls. **Reactivation efforts** will focus on structured outreach, Membership Power Hours, and targeted win-back campaigns designed to re-engage lapsed members without relying on discounts.

In conclusion, the Membership Action Plan represents an integrated, measurable, and adaptable roadmap for growth. By aligning strategy, messaging, technology, and human connection around a shared mission, NAIFA is positioned to strengthen its membership base, increase engagement and loyalty, and ensure the association remains a powerful advocate and professional home for financial services professionals.

Remember...

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

