



Advocate. Educate. *Differentiate.*

Chapter Executive Leadership Meeting

May 14, 2019

8-11:30 a.m.



Advocate. Educate. *Differentiate.*



Welcome!

Jill M. Judd, LUTCF, FSS
NAIFA President





NAIFA Brand Overview

**Sheila Owens
VP, Communications &
Content Strategy**



Brand Book Presentation

May 2019

Agenda

- Branding: Research & Discovery
- Elements of the Brand
- Creatives
- Brand Launch/Timeline
- NAIFA Serves Main Street USA

We set off on a course of Discovery

- Background research: NAIFA communications, competitive overview
- Interviews with key personnel
- Immersion session
- Member survey

We found key themes in our Discovery

- NAIFA has an opportunity to be the most influential voice for the financial services industry.
- The current NAIFA story lacks emotion.
- NAIFA communications are inwardly focused. Need to emphasize *why* our members do what they do.
- NAIFA's push for diversity can become more compelling if it is about providing financial help for all consumers.

We had an Immersion Session together

And we learned...

to be bold!



We tested 3 positioning ideas with members

And discovered what ideas members value most.

Resilience. NAIFA is here to build resilience in a changing world.

Uncertainty. NAIFA exists to help our members and their clients overcome uncertainty so they can make decisions with confidence.

Fairness. NAIFA's job is to make security and prosperity available to everyone, regardless of wealth or income.

We identified NAIFA's personality characteristics

Trustworthy
Resourceful
Helpful
Determined
Authentic
Optimistic

ELEMENTS OF THE BRAND

Defining Elements of the NAIFA Brand

There are four basic elements that go into defining and shaping any brand:

1. **Brand Strategy:** In simple terms, how the brand will achieve the organization's goals and answer audiences' wants and needs.
2. **Brand Promise:** The strategic statement that captures who you are and why audiences should care.
3. **Brand Personality & Voice:** Directs the tone and language for all brand communications.
4. **Brand Architecture:** The blueprint for the brand. It takes the brand promise and diagrams supporting messages focused on key beliefs and benefits that may be most meaningful to each audience. It effectively tailors the brand story for each audience.

NAIFA's Brand Strategy

Challenge assumptions about associations' current lack of relevance and value by showing what agents and advisors of all stripes can accomplish when working together as one NAIFA community.

NAIFA's Brand Promise

NAIFA helps agents, advisors, partners, and the people they serve find confidence in an ever-changing world.

NAIFA's Brand Personality

NAIFA is:

- Optimistic
 - Helpful
 - Resourceful
 - Determined
 - Authentic
 - Trustworthy
 - Straightforward
 - Relatable
- An everyperson who rallies others to band together and help one another achieve security, peace of mind, and brighter futures for all

“The time is always right to
do what’s right.”

-Dr. Martin Luther King, Jr.

NAIFA's Brand Voice

How Others Talk	How NAIFA Talks
We cultivate mutually beneficial relationships.	We help each other. We push each other.
Our association promotes professional development needs and leadership skills.	We help you learn the skills that matter most to your practice and the people you serve.
Our association contributes to the sharing of professional knowledge, information, and experiences.	We exchange ideas and solve urgent problems together.
...protect the financial and retirement security of the American people.	...help people spend less time worrying and more time enjoying all that the future holds.

NAIFA's Brand Goals By Audience

Goal	Influence public policy	Inspire and engage our community	Improve revenue and performance	Build a stronger, more unified organization	Build a bridge to the consumer
Audience	Lawmakers & Regulators	Members & Prospects	Corporate Members & Sponsors	NAIFA Leaders	Consumers
Purpose	Build support for policies that enable the important work of our members	Build support and a shared sense of pride	Elevate NAIFA to the industry's most influential voice	Inspire a collective sense of purpose and drive	Demonstrate added value of working with NAIFA members

Brand Architecture: Lawmakers & Regulators

Promise

NAIFA helps agents, advisors, partners, and the people they serve find confidence in an ever-changing world.

Key Messages

- We stand up for equal access to sound advice and advocate for the policies that help everyone—regardless of wealth—create more secure, prosperous futures.
- Making it easier for individuals to access trusted agents and advisors means fewer financial crises disrupting the futures of individuals, families, communities, and governments.
- NAIFA agents and advisors stand together as the largest group of advocates for personal security, community prosperity, and individual achievement.
- Our members maintain a direct line to the needs of Middle America because they're part of it. They're small business owners, parents, grandparents, and caregivers working with small business owners, parents, grandparents, and caregivers in every district in the country.
- With deep, long-term relationships in communities large and small, NAIFA helps connect the dots between what communities need and how policymaking can best enable the important work of insurance agents and financial advisors. For 129 years, we've made it possible for members to share their stories with both state and federal policymakers, creating policies that help everyone protect themselves and take fear out of their future.
- Ultimately, NAIFA helps individuals, agents, advisors, and policymakers make decisions with confidence.

Brand Architecture: Members & Prospects

Promise

NAIFA helps agents, advisors, partners, and the people they serve find confidence in an ever-changing world.

Key Messages

- In a tough industry where the burdens can be overwhelming to bear alone, NAIFA members stand by each other. We reach across service area silos and lift each other up.
- We stand together as the largest group of advocates for personal security, community prosperity, and individual achievement.
- *We stand up for equal access to sound advice and advocate for the policies that help everyone—regardless of wealth—create more secure, prosperous futures. For 129 years, we’ve made it possible for members to share their stories with both state and federal policymakers, creating a legislative environment that enables agents and advisors to do what they do best more easily, no matter where they practice.
- **We don’t just provide resources. We make it clear how to apply knowledge to the right context. We provide opportunities to connect by geography or specialty, exchange ideas, and solve urgent problems together. As a result, NAIFA members have been shown to outperform peers by 64% in premium volume.
- We help agents and advisors adapt to the changing needs of their customers and communities. For example, our Professional Pathway makes it easier for agents and advisors to cut through the clutter, and learn the skills that matter to them and the people they serve.
- Ultimately, NAIFA helps agents, advisors, and their customers make decisions with confidence.

*Member survey results suggest that an advocacy-focused message may be particularly compelling to seasoned advisors and agents and longstanding members, while a message about equal access to sound advice may be more compelling to advisors and agents under age 41.

**Member survey results suggest messages about opportunities to exchange ideas may be particularly compelling to advisors and agents under age 41. New York Life study of agents showed that NAIFA members produced 64% more in premiums compared to other agents in the same stage of their career path.

Brand Architecture: Corporate Members/Sponsors

Promise

NAIFA helps agents, advisors, partners, and the people they serve find confidence in an ever-changing world.

Key Messages

- In a tough industry where the burdens can be overwhelming to bear alone, NAIFA members stand by each other. We reach across service area silos and companies and lift each other up.
- We stand together as the largest group of advocates for personal security, community prosperity, and individual achievement.
- We stand up for equal access to sound advice and advocate for the policies that help everyone—regardless of wealth—create more secure, prosperous futures. For 129 years, we’ve made it possible for members to share their stories with both state and federal policymakers, creating a legislative environment that enables agents and advisors to do what they do best more easily, no matter where they practice.
- We don’t just provide resources. We make it clear how to apply knowledge to the right context. We provide opportunities to connect by geography or specialty, exchange ideas, and solve urgent problems together. As a result, NAIFA members have been shown to outperform peers by 64% in premium volume.
- We help agents and advisors adapt to the changing needs of their customers and communities. For example, our Professional Pathway makes it easier for agents and advisors to cut through the clutter, and learn the skills that matter to them and the people they serve.
- When you join with NAIFA, you become part of creating a more confident future for your business—and for the agents, advisors, and people they serve in communities large and small across the country.

Brand Architecture: NAIFA Leaders

Promise

NAIFA helps agents, advisors, partners, and the people they serve find confidence in an ever-changing world.

Key Messages

- As one unified NAIFA, we stand up for equal access to sound advice and advocate for the policies that help everyone —regardless of wealth—create more secure, prosperous futures.
- With deep, long-term relationships in communities large and small, NAIFA helps connect the dots between what communities need and how policymaking can best enable the important work of insurance agents and financial advisors in those communities. For 129 years, we’ve made it possible for members to share their stories with both state and federal policymakers, creating a legislative environment that enables agents and advisors to do what they do best more easily, no matter where they practice.
- With local and state associations, we make it possible for members to connect by geography or specialty, exchange ideas, and solve urgent problems together. As a result, NAIFA members have been shown to outperform peers by 64% in premium volume.
- By pooling our collective knowledge, we help agents and advisors better adapt to the changing needs of their customers and communities. Our Professional Pathway is just one example of how we’re making it easier for agents and advisors to cut through the clutter, and learn the skills that matter to them and the people they serve.
- Ultimately, we are stronger, more resilient, and more capable together. Working together as one NAIFA community, we can help agents and those they serve spend less time worrying and more time enjoying all the possibilities that the future holds.

Brand Architecture: Consumers

Promise

NAIFA helps agents, advisors, partners, and the people they serve find confidence in an ever-changing world.

Key Messages

- We believe no one should be priced out of sound planning and financial advice. Everyone, regardless of how much they earn or where they live, deserves an opportunity to protect themselves and take fear out of their future.
- Making it easier for individuals to access trusted agents and advisors means fewer financial crises disrupting the futures of individuals, families, and communities.
- NAIFA agents and advisors stand together as the largest group of advocates for personal security, community prosperity, and individual achievement.
- When you work with a NAIFA agent, you're working with someone who holds themselves accountable to the highest ethical standards and who never loses sight of your best interests.
- Our agents understand your needs because they live and work where you do. We're small business owners, parents, grandparents, and caregivers working with small business owners, parents, grandparents, and caregivers.
- NAIFA agents are continually adapting to respond to all the future-proofing needs someone might have—including financial and retirement planning, education planning, healthcare, long-term care, and small business employee benefits.
- We make it easy to find a trusted advisor that meets your needs with our "Advisors You Can Trust" tool.
- Ultimately, NAIFA helps individuals spend less time worrying and more time enjoying all the possibilities that the future holds.

CREATIVE

Key Insights

"Uncertainty"

NAIFA exists to help our members and their clients overcome uncertainty.

=

Creative Position

"Questions"

Together, we can take on anything.

UNCERTAINTY: Preparing for the unknown

Everything could turn upside down tomorrow. We could pick up a lottery ticket and change our lives. And the investment world -- we've seen that roller coaster ride at its most extreme. Yes, we live in a world of uncertainty. But our job, as an industry, is to help people plan for whatever is to come.

To accomplish that seemingly impossible task, each of us has to be immersed in the facts about today, and the possibilities for tomorrow. Now, more than ever, we need each other, for knowledge sharing, support and advice.

This direction presents uncertainty as a given in our industry. To potential and existing members, it shows the importance of belonging. To lawmakers, it emphasizes the relevance of our industry. Corporate sponsors will take on a new level of respect for membership, as they recognize the intricacies involved in our industry. And the consumer will know they must seek professional advice to plan for the unknown.

Branding: “QUESTIONS”

Examples of creatives for:

- College Planning
- Long-Term Care
- Employee Benefits
- Life Insurance
- Main Street
- Diversity
- Advisor Trust
- Advocacy
- Retirement



**SHE'S GOING TO BE
IN A PROFESSION
THAT HASN'T EVEN
BEEN INVENTED YET.
HOW DO WE
PREPARE
FOR THAT?**

Our industry is filled
with questions.
And NAIFA brings
you the answers,
with peer
connections and
information that
keep you up-to-the-
minute on every
topic. Join today,
and you – and your
clients – will feel
better about
tomorrow.

NAIFA
TOGETHER, WE CAN
TAKE ON ANYTHING.

129146877



**WILL HER
LONG-TERM
CARE
COVERAGE
BE THERE
FOR THE
LONG
TERM?**

Our industry is filled with questions. And NAIFA brings you the answers, with peer connections and information that keep you up-to-the-minute on every topic. Join today, and you – and your clients – will feel better about tomorrow.

NAIFA
TOGETHER, WE CAN
TAKE ON ANYTHING.

ALTERNATE: How do you make sure her long-term care coverage will be there for the long term?



**WILL
HEALTHCARE
BE THE
DEATH
OF HIS
COMPANY?**

Your clients' businesses are facing huge challenges. NAIFA shows you how they can overcome them, with peer connections and solutions that are working in the real world. Join today, and gain the insight to help them survive. And prosper.

NAIFA
TOGETHER, WE CAN
TAKE ON ANYTHING.



HOW CAN WE
CONFIDENTLY
SIT IN FRONT OF
THEM AND SAY,
"LET'S TALK
ABOUT THE
YEAR 2048?"

The future is filled with uncertainty. But with the peer connections and information you get from NAIFA, you'll have the know-how to help them prepare for whatever is to come. Join today, and it will be easier to talk to them about tomorrow.

NAIFA
TOGETHER, WE CAN
TAKE ON ANYTHING.



**HOW DOES
WALL STREET
AFFECT 615
EDWARDS
AVENUE?**

958303856

Our industry is filled with questions. And NAIFA brings you the answers, with peer connections and information that keep you up-to-the-minute on every topic. Join today, and you – and your clients – will feel better about tomorrow.

NAIFA

**TOGETHER, WE CAN
TAKE ON ANYTHING.**



**WILL
"PROSPERITY
FOR ALL"
REALLY
MEAN
PROSPERITY
FOR ALL?**

Our industry is filled with questions. And NAIFA brings you the answers, with peer connections and information that keep you up-to-the-minute on every topic. Join today, and you – and your clients – will feel better about tomorrow.

NAIFA
TOGETHER, WE CAN
TAKE ON ANYTHING.



**CAN YOU MAKE
SURE THEY
TRUST
YOU IN AN
UNTRUSTWORTHY
MARKET?**

Our industry is filled with questions. And NAIFA brings you the answers, with peer connections and information that keep you up-to-the-minute on every topic. Join today, and you – and your clients – will feel better about tomorrow.

NAIFA
TOGETHER, WE CAN
TAKE ON ANYTHING.



HOW WILL THE HOUSE'S DECISIONS AFFECT HER HOUSE?

Our industry is filled with questions. And NAIFA brings you the answers, with peer connections and information that keep you up-to-the-minute on every topic. Join today, and you – and your clients – will feel better about tomorrow.

NAIFA
TOGETHER, WE CAN
TAKE ON ANYTHING.

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**WILL HER
529 KEEP
GROWING,
TOO?**

Our industry is filled with questions. And NAIFA brings you the answers, with peer connections and information that keep you up-to-the-minute on every topic. Join today, and you – and your clients – will feel better about tomorrow.

NAIFA
TOGETHER, WE CAN
TAKE ON ANYTHING.



**WHAT'S
THE ROAD
TO THEIR
FUTURE?**
(WILL WE EVEN
HAVE ROADS THEN?)

Our industry is filled with questions. And NAIFA brings you the answers, with peer connections and information that keep you up-to-the-minute on every topic. Join today, and you – and your clients – will feel better about tomorrow.

NAIFA
TOGETHER, WE CAN
TAKE ON ANYTHING.

Creative Checklist

- ☒ Is it BOLD?
- ☒ Does it have EMOTION?
- ☒ Will it have meaning to each AUDIENCE?
- ☒ Can it live in multiple FORMATS?
- ☒ Does it have LONGEVITY?
- ☒ **Does it answer WHAT and WHY?**

LAUNCH PLAN

Launching the Brand

Internally

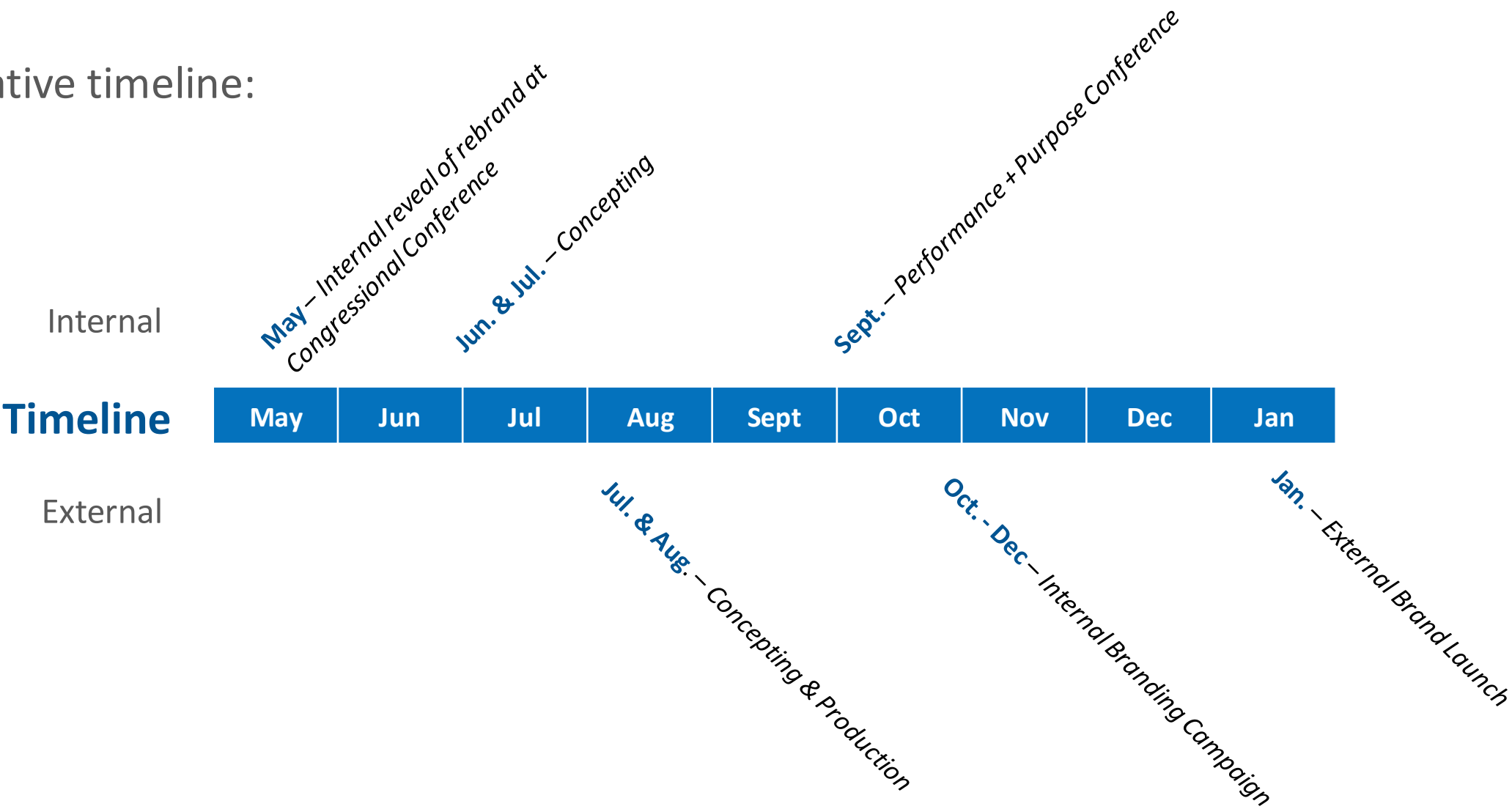
Bring the brand to life; instill creating *confidence* as the cornerstone of the NAIFA culture to create a shared sense of pride and a collective sense of purpose and drive.

Externally

Address all members, corporate sponsors, lawmakers and consumers so they understand the value of NAIFA as an advocate to create a more prosperous future for all.

Brand Launch Timeline

Tentative timeline:





NAIFA Members Serve Main Street.

Find an Advisor Today!

www.AdvisorsYouCanTrust.org



#MainStreetUSA

NAIFA Members Help Clients Achieve the American Dream

Find an Advisor You Can Trust at www.AdvisorsYouCanTrust.org

The National Association of Insurance and Financial Advisors (NAIFA) surveyed its members to determine who their clients are and how those clients are served. Of particular interest was how NAIFA members serve middle-market households as well as those with lower or moderate incomes. The survey of 694 NAIFA members was conducted between Dec. 19, 2018, and Jan. 8, 2019.



Survey Key Findings #1

You don't have to be wealthy to benefit from insurance and financial services and products provided by advisors.

- Nine out of ten NAIFA members reported that they serve middle-income individuals and families, while 42 percent say they have at least some lower-income individuals and families among their clients.
- A typical client's annual household income falls below \$150,000 for 82 percent of advisors and below \$100,000 for 49 percent of advisors.
- A typical client has liquid financial assets (excluding real estate, vehicles, and other fixed assets) of less than \$250,000 for 67 percent of advisors and less than \$100,000 for 43 percent of advisors.

42%

**of NAIFA members
serve lower-income
clients**

Typical Liquid Assets of NAIFA Members' Clients



Typical Annual Household Income of NAIFA Members' Clients



- Nine out of 10 NAIFA members say they serve middle-income individuals and families
- 42% serve lower-income families

Survey results on NAIFA.org

You Don't Have To Be Wealthy To Work With An Insurance And Financial Advisor

Events impacting Americans' wallets in early 2019 – including the partial government shutdown and the lower-than-expected tax refunds – have put a spotlight on Americans' financial lives, drawing attention to how common it is for Americans to live paycheck to paycheck and raising questions about their lack of preparedness to secure their financial futures.

While many lower- to middle-market Americans may not be surprised by the financial vulnerability that resides in millions of U.S. households and businesses today, [a new survey of members of the National Association of Insurance and Financial Advisors](#) confirms that financial security is within reach in the form of affordable and informed financial advice for this very market.

According to the survey, 80 percent of NAIFA members say their businesses primarily serve middle- to lower-income families and individuals. Almost half (45 percent) say the "typical annual household income" of their clients falls between \$50,000 and \$100,000; 34 percent say their typical client's annual income falls between \$100,000 and \$150,000; and 4 percent say their typical client earns less than \$50,000 annually.

"There is no shortage of professionals offering individualized financial advice and services for middle- and lower-income Americans," said [NAIFA CEO Kevin Mayeux, CAE](#). "Our survey shows that for anyone looking for help with their insurance or financial needs, there is an agent or advisor eager to work with them. NAIFA members are in communities across the United States striving to ensure financial security and prosperity for friends and neighbors as well as local families and small business owners. That's what we mean when we say that NAIFA represents the interests of Main Street Americans."

- [See the survey results.](#)
- [Read the complete media release.](#)
- [Read Kevin Mayeux's column on Medium.com: "Every American Should Have Access to Affordable Financial Advice."](#)
- [Learn more about how NAIFA members serve Main Street consumers.](#)

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Page printed from: <https://www.thinkadvisor.com/2019/2019/03/01/7-new-naifa-member-facts/>

7 New Facts About What Your Colleagues Are Really Like

Many life agents can sell securities. And many say they're still recommending long-term care insurance.

By Allison Bell | March 01, 2019

Typical life and health agents who belong to the National Association of Insurance and Financial Advisors have told NAIFA that, in their world, sales commissions are still the dominant form of compensation.



(Image: Thinkstock)

“It turns out that what members of a key financial advisor group really do, a lot, is protect clients, and the clients' loved ones, against the risk of premature death.”

– Allison Bell, Editor,
ThinkAdvisor Life/Health



NAIFA Members Offering More Services, Staying Commission-Based



By [Susan Rupe](#)



Kevin Mayeux, NAIFA CEO, discusses the results of the association's first comprehensive membership survey in nearly a decade.

You don't have to be wealthy to have an advisor, the results of an industry association membership survey showed.

The National Association of Insurance and Financial Advisors conducted its first comprehensive membership survey in nearly a decade. Among the findings are that members are offering more products and services than ever before, while still receiving the bulk of their income from commissions instead of fees.

The NAIFA survey was conducted at the end of 2018. The survey focused on who members are, the services they provide, the clients they serve and how they are compensated.

The Affordable Financial Advisors? 80% Of NAIFA Work With Middle Class

FEBRUARY 27, 2019 • [TRACEY LONGO](#)

A new survey from the National Association of Insurance and Financial Advisors found that 80 percent of the lobbying powerhouse's 30,000-member group work primarily works with middle-income clients.



NAIFA

@NAIFA



Find an advisor today! hubs.ly/H0gPYmW0
#MainStreetUSA #retirement
#financialplanning #financialadvisor
#financialfreedom #moneymatters #investing

NAIFA advisors are always ready to help with financial decisions, no matter how grand or small. This is how our members serve Main Street Americans in all communities.



www.AdvisorsYouCanTrust.org

#MainStreetUSA

11:05 AM - 28 Feb 2019

**Tweet and
re-tweet!**



Advisors You Can Trust

WHO WE ARE

WHAT WE DO

WHO WE SERVE

BLOG

FIND AN ADVISOR

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. 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

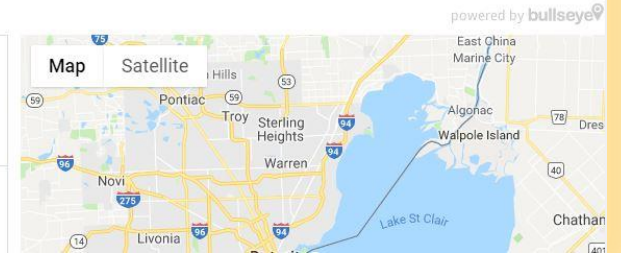
Contact:
Buren Insurance
Group
Director of Sales &
Marketing

Holly Spann, ChFC, RICP, CLU

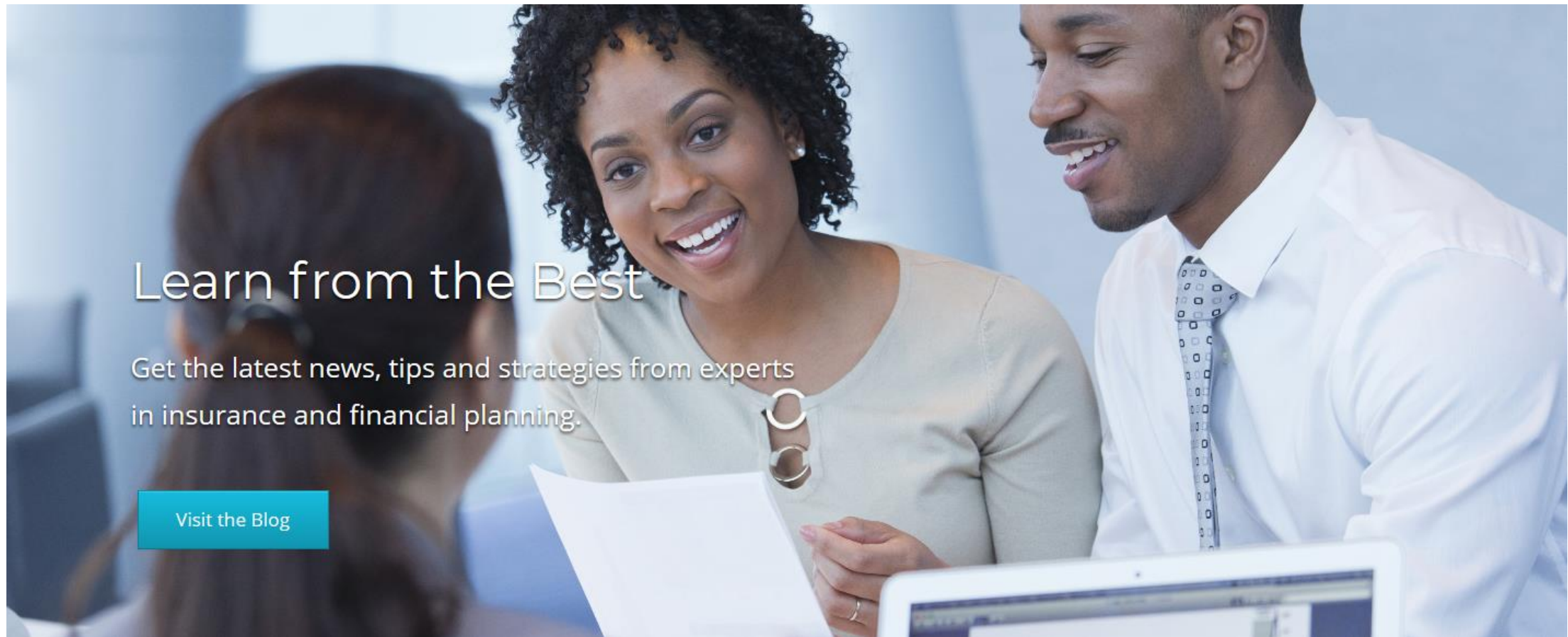
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Holly Spann Agency



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Learn from the Best

Get the latest news, tips and strategies from experts
in insurance and financial planning.


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Contributes to a 'Life Well-Lived'



Juli McNeely: An Advisor on a
Mission to Advance Financial
Wellness



Ike Trotter: Going the Extra Mile



Aprilyn Geissler: Plan for the
Unexpected

For more information:

Sheila Owens

Vice President, Communications & Content Strategy

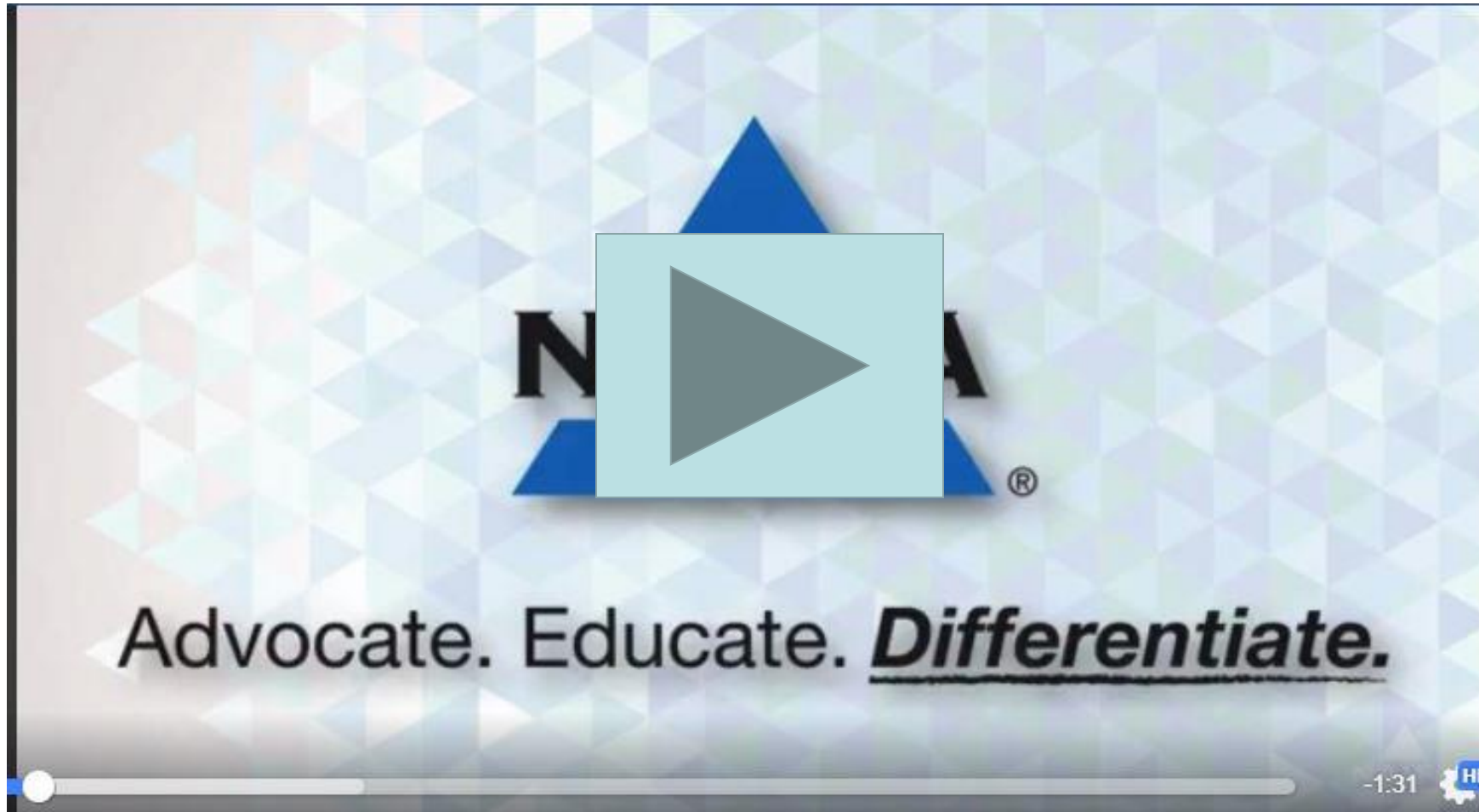
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703.770.8112



Message We're Sending to the Industry

Kevin Mayeux
NAIFA CEO





POWER OF THE PIN

Delivering on NAIFA's Membership Promise

Partnership Update



NAIFA As an Advocacy Partner



Message to ACLI





Chapter Success Framework

**Lawrence J. Holzberg,
LUTCF
NAIFA Trustee**



Benchmarks for Success

Michele Grassley Clarke
**VP, Member & Chapter
Services**

Benchmarks for Success

Budgeting with a Growth Mindset

Striking the Right Balance on Your Balance Sheet

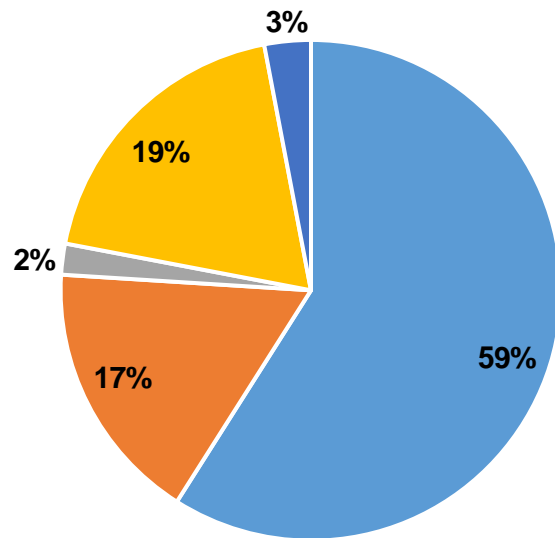
Healthy:
6-12 Months
of Operating
in Reserves

- 33% of States < 6 Months
- 21% of States 6-12 Months
- 37% of States >12 Months

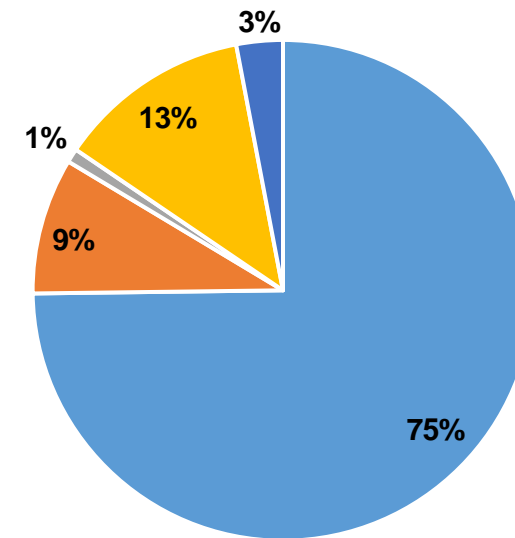
- 39% of Locals < 6 Months
- 26% of Locals 6-12 Months
- 34% of Locals > 12 Months

Striking the Right Balance on Your Top Line

Recommended for States



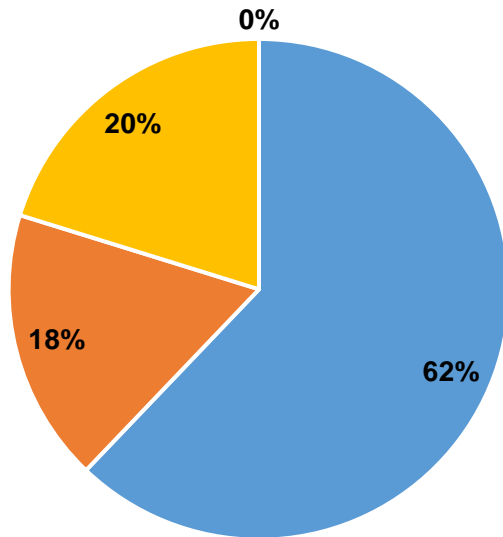
Average State Chapter



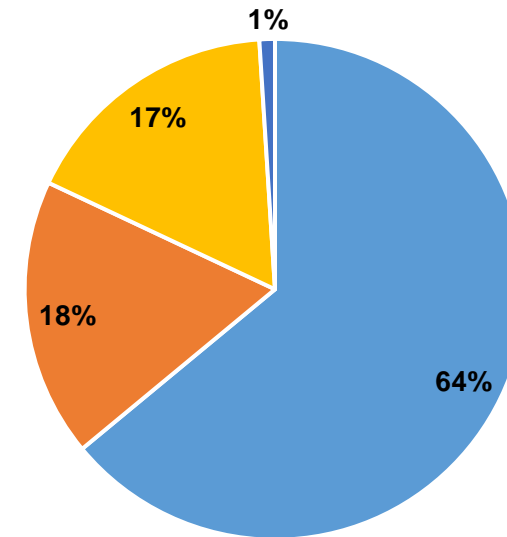
■ Dues ■ Exhibits/Ads/Sponsors ■ PAC Admin Revenue ■ Reg. Fees/Pubs/Royalties ■ Other Revenue

Striking the Right Balance on Your Top Line

Recommended for Locals



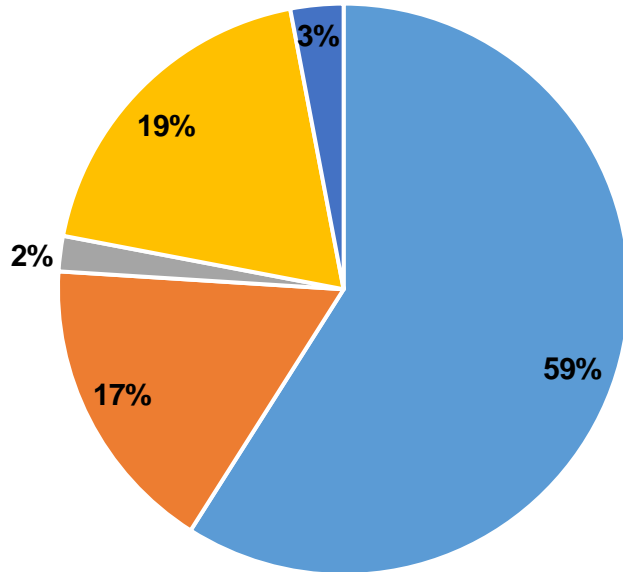
Average Local Chapter



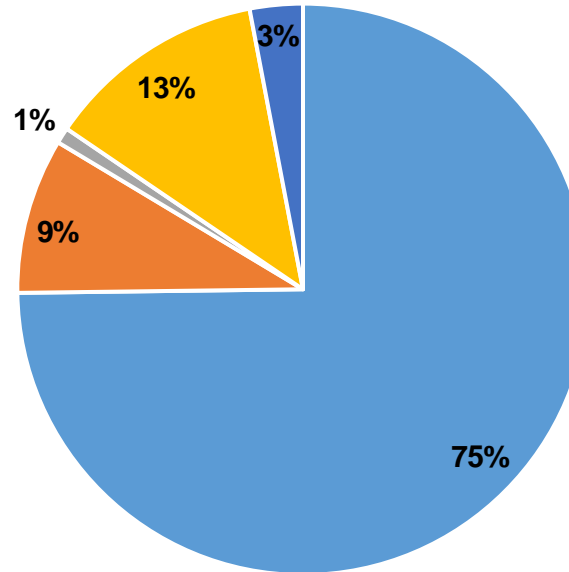
■ Dues ■ Exhibits/Ads/Sponsors ■ PAC Admin Revenue ■ Reg. Fees/Pubs/Royalties ■ Other Revenue

Chapter Revenues by Source

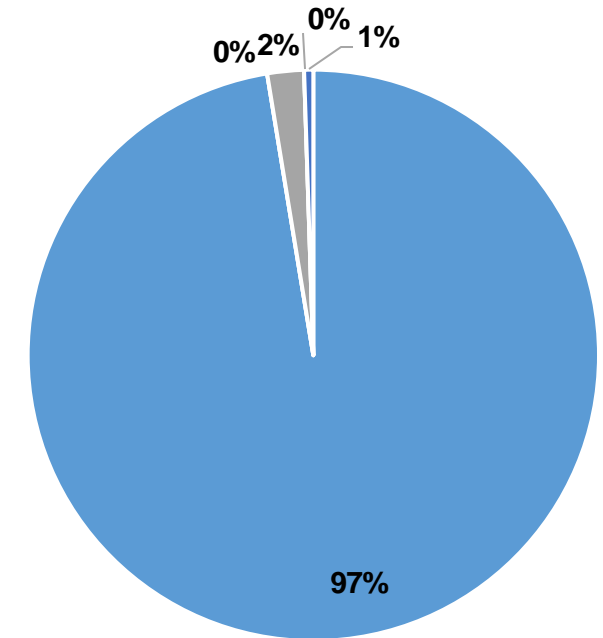
Recommended



National Average



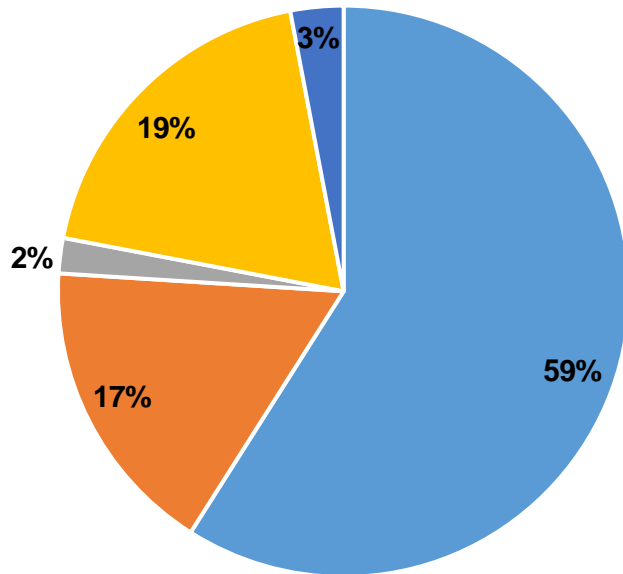
State Example



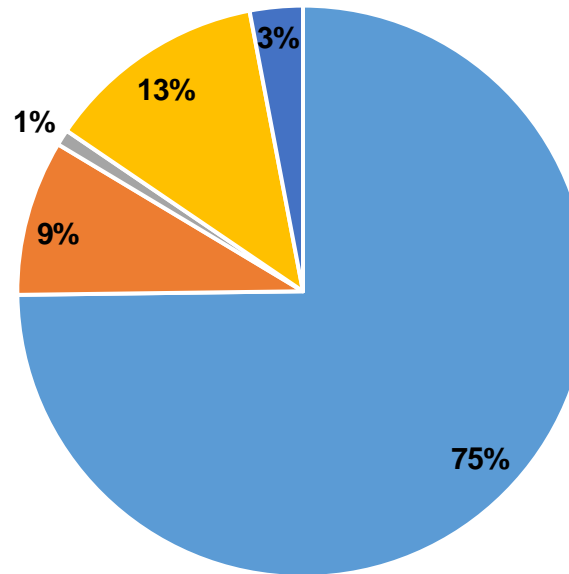
■ Dues
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 ■ PAC Admin Revenue
 ■ Reg. Fees/Pubs/Royalties
 ■ Other Revenue

Chapter Revenues by Source

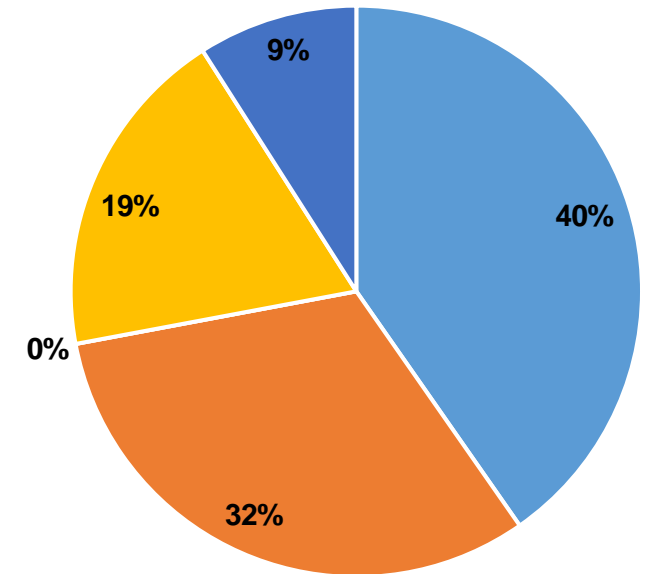
Recommended



National Average



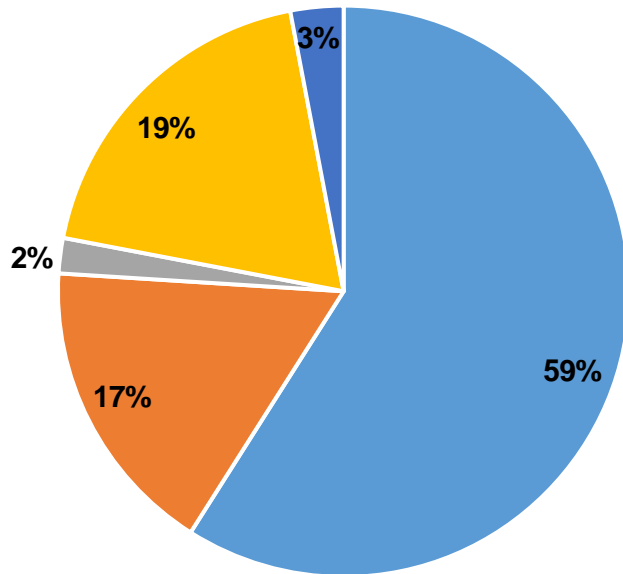
State Example



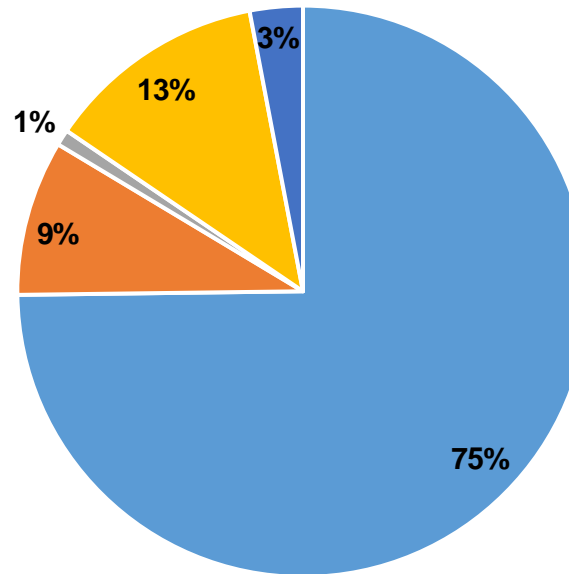
■ Dues
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 ■ Reg. Fees/Pubs/Royalties
 ■ Other Revenue

Chapter Revenues by Source

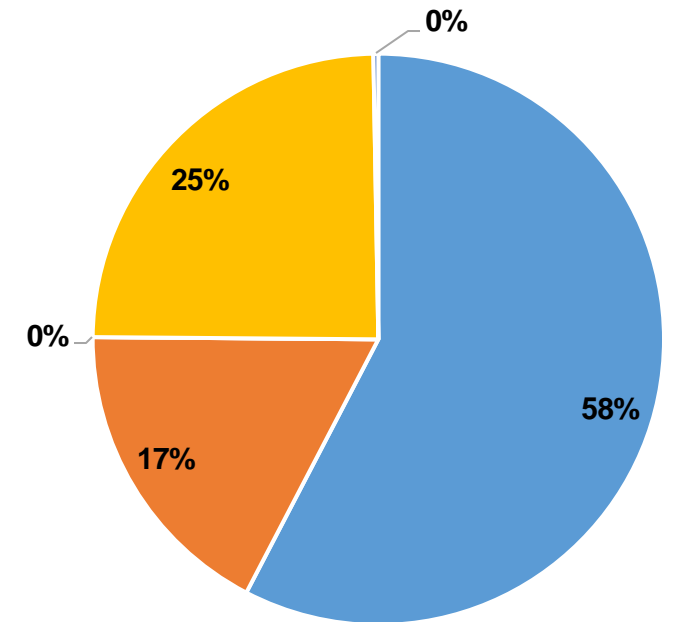
Recommended



National Average



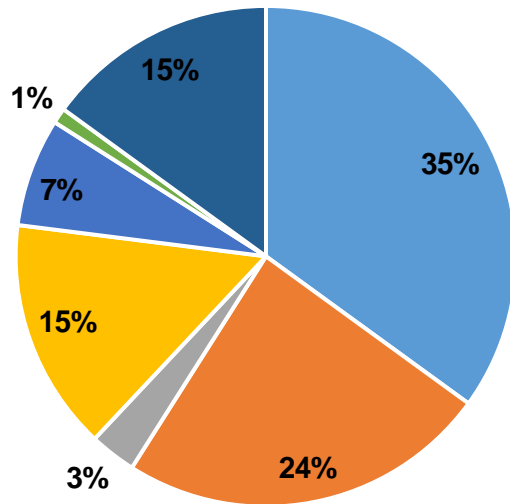
State Example



■ Dues
 ■ Exhibits/Ads/Sponsors
 ■ PAC Admin Revenue
 ■ Reg. Fees/Pubs/Royalties
 ■ Other Revenue

Striking the Right Balance on Your Expenditures

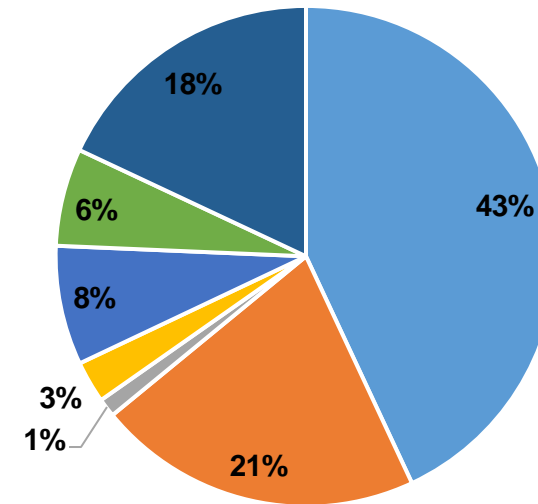
Recommended for States



■ Staff/Prof Fees (excluding Lobbyist)
■ Programs/Publications/Services

■ Governance/Volunteer Expenses
■ General & Administrative

Average State Chapter

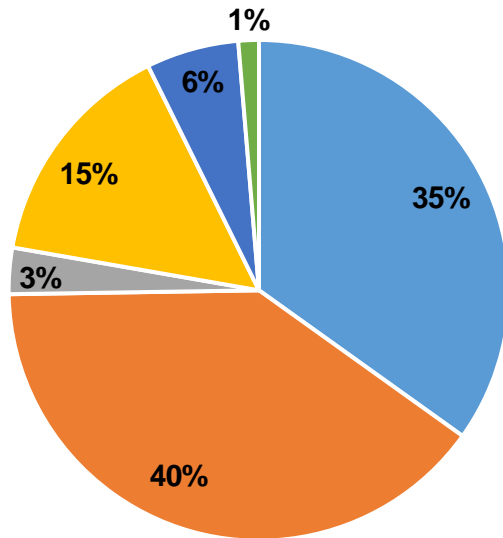


■ PAC Fundraising & Admin Fees
■ Marketing

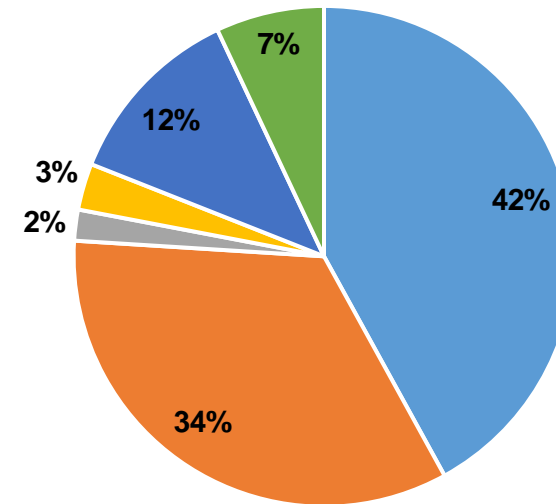
■ Government Relations/Lobbyist

Striking the Right Balance on Your Expenditures

Recommended for Locals



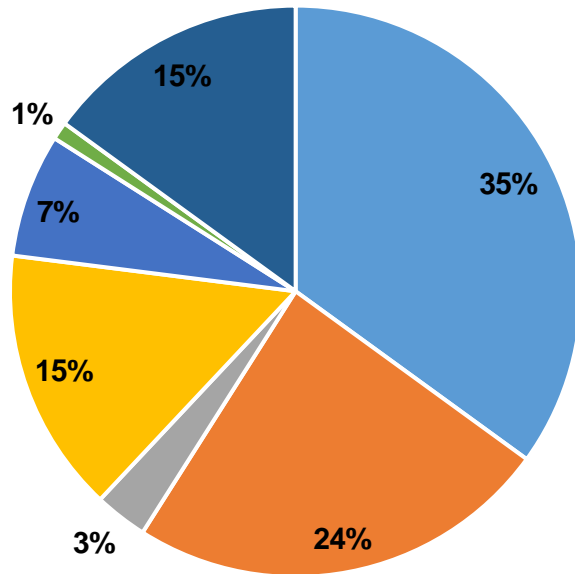
Average Local Chapter



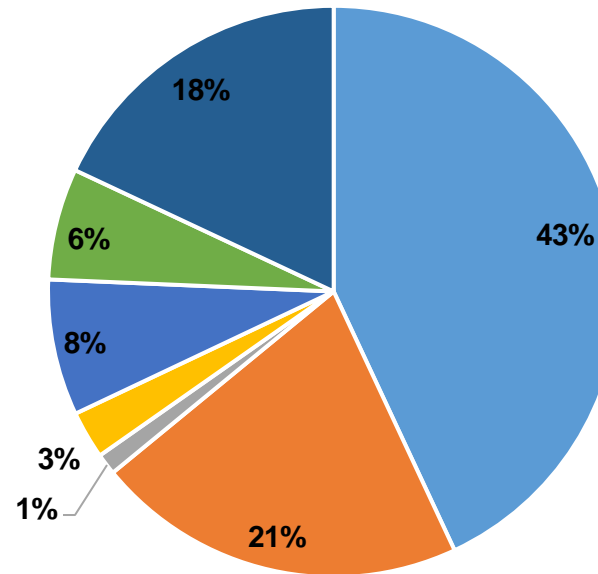
■ Staff/Prof Fees (excluding Lobbyist)	■ Programs/Publications/Services	■ PAC Fundraising & Admin Fees	■ Marketing
■ Governance/Volunteer Expenses	■ General & Administrative	■ Government Relations/Lobbyist	

Chapter Expenses by Type

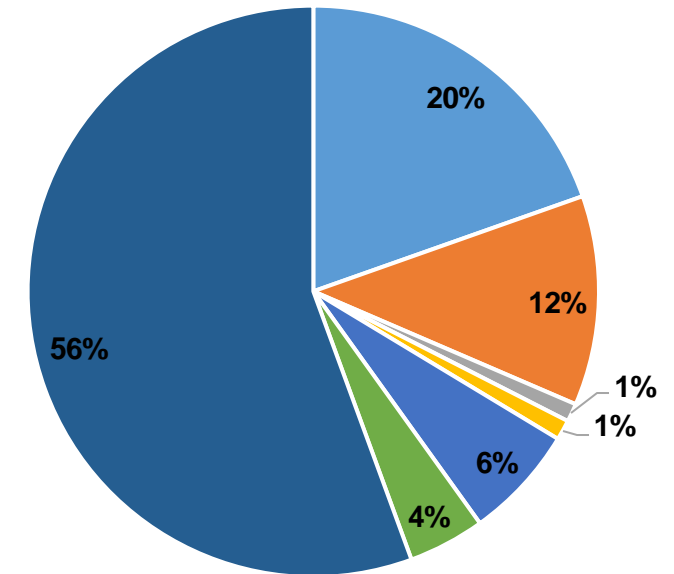
Recommended



National Average



Example

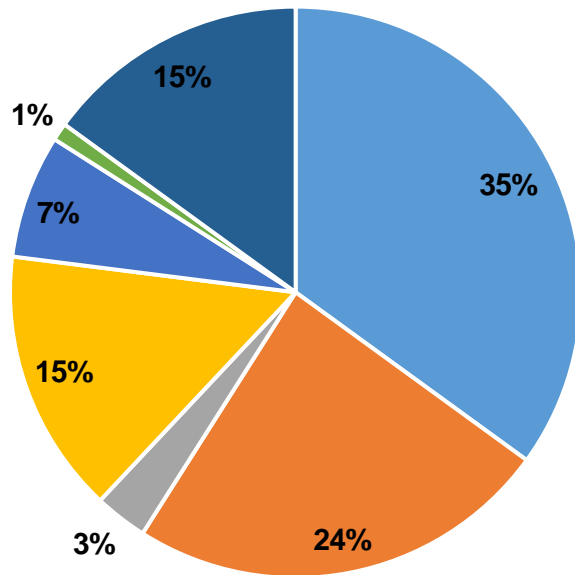


■ Staff/Prof Fees (excluding Lobbyist)
■ Programs/Publications/Services
■ PAC Fundraising & Admin Fees
■ Marketing

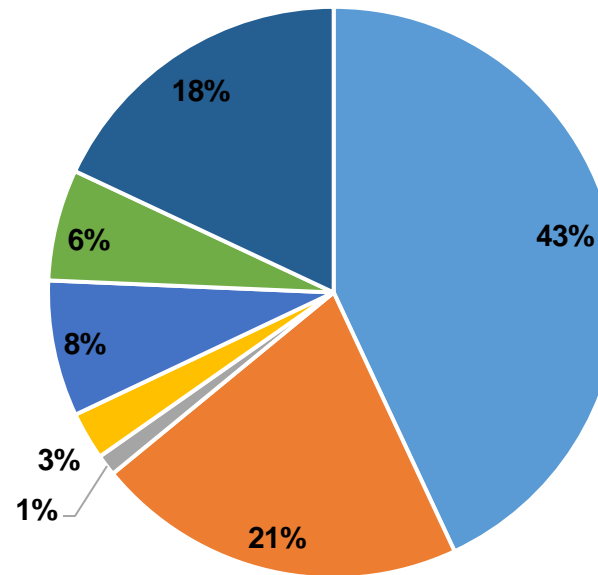
■ Governance/Volunteer Expenses
■ General & Administrative
■ Government Relations/Lobbyist

Chapter Expenses by Type

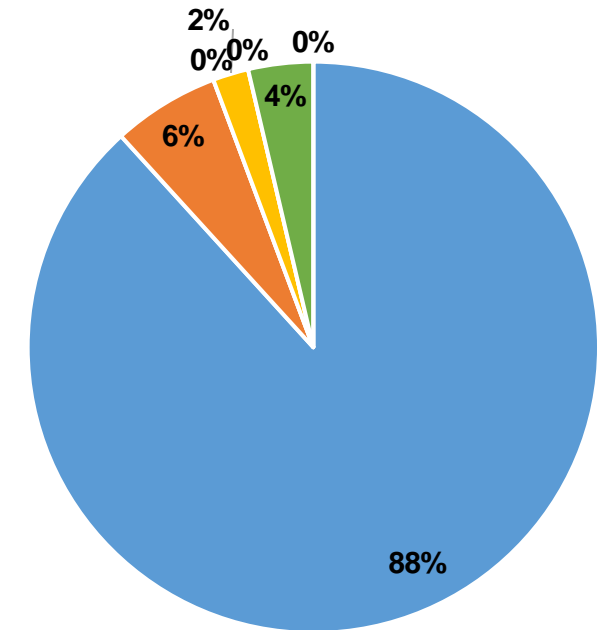
Recommended



National Average



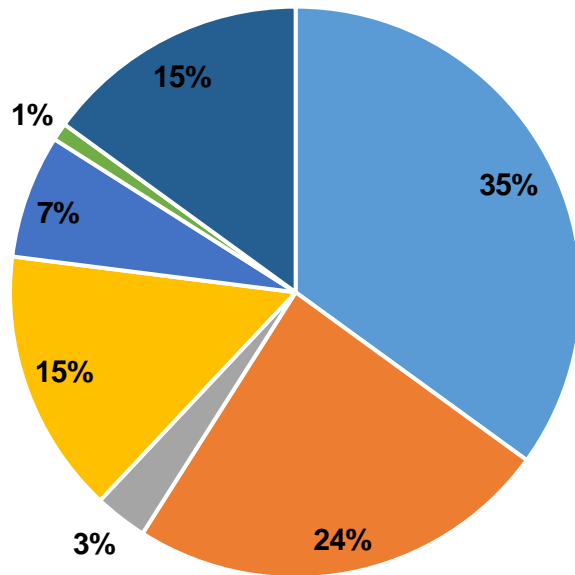
Example



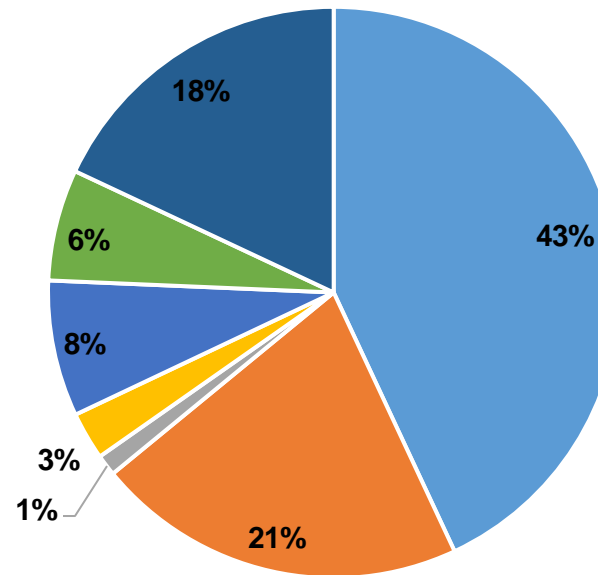
■ Staff/Prof Fees (excluding Lobbyist)
■ Programs/Publications/Services
■ PAC Fundraising & Admin Fees
■ Marketing
■ Governance/Volunteer Expenses
■ General & Administrative
■ Government Relations/Lobbyist

Chapter Expenses by Type

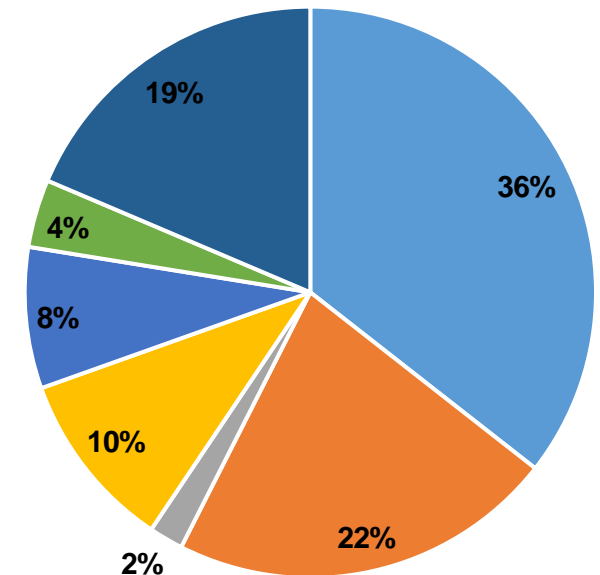
Recommended



National Average



Example



■ Staff/Prof Fees (excluding Lobbyist)	■ Programs/Publications/Services	■ PAC Fundraising & Admin Fees	■ Marketing
■ Governance/Volunteer Expenses	■ General & Administrative	■ Government Relations/Lobbyist	

Benchmarks for Success

Micro-Volunteerism in the New NAIFA

Volunteer Profile

- 84% Reported a Very Positive or Positive Impact on Their Career
- 57% of Assn Volunteers Contributed < 1 hour/month
27% contributed < 1 hour/week
- 30% of Assn Volunteers Were Not Identified as Volunteers by the Assn

Why Members Don't Volunteer

- Not enough information about opportunities (39%)
- I volunteer elsewhere (35%)
- I was never asked (29%)
- No knowledge of electronic or virtual opportunities (23%)
- No knowledge of short-term assignments (22%)

Volunteer Satisfaction

- Only 19% of Assn Volunteers Were Very Satisfied with Their Volunteer Experience
- Only 13% of Assn Volunteers Were Very Likely to Volunteer Again Next Year
- Only 14% of Assn Volunteers Were Very Likely to Recommend it to Others

Tips for a Successful Program

- Make it Part of Your Plan.
- Champion it!
- Offer Variety
 - Ad Hoc/Short Term/Virtual
 - Different Skills/Personalities
- Communicate benefits.
- Promote often.
- Make a Personal Ask...and Keep Asking!
- Recognize ALL volunteer contributions.

NAIFA Chapter Best Practice: Board Accountability

The Power of Scrum



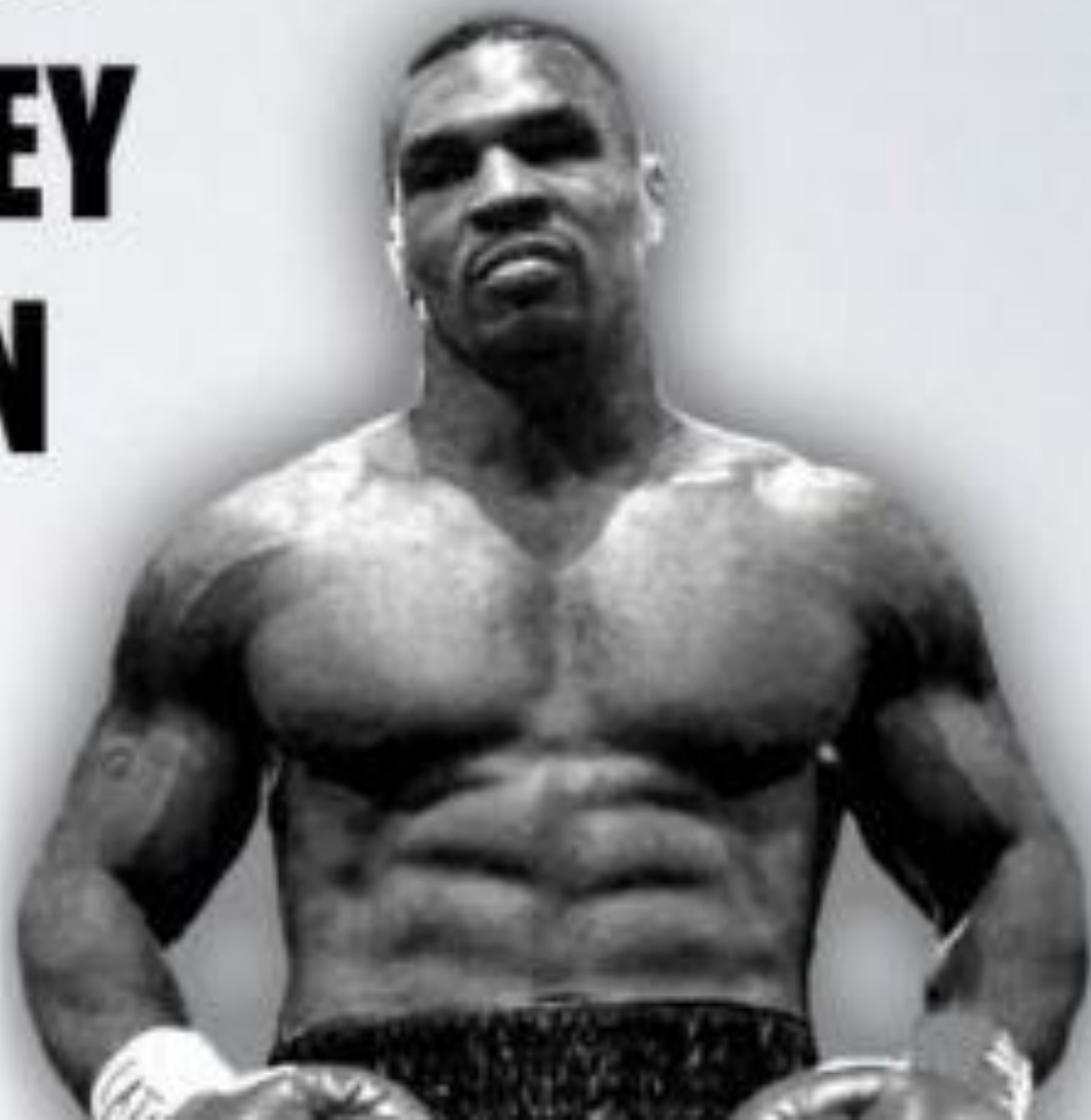
John D. Richardson, RICP[®], LACP[®]
2019 NAIFA-Tennessee President
2019 NAIFA National YAT Committee Chairman
2018 NAIFA YAT Leader of the Year

January 1, 2019



**“EVERYBODY HAS
A PLAN UNTIL THEY
GET PUNCHED IN
THE FACE”**

- MIKE TYSON



The Critical Question

How do we make NAIFA
board meetings
productive and fun?

Advocate. Educate. *Differentiate.*

The answer is Scrum!







A Quick Review of Scrum

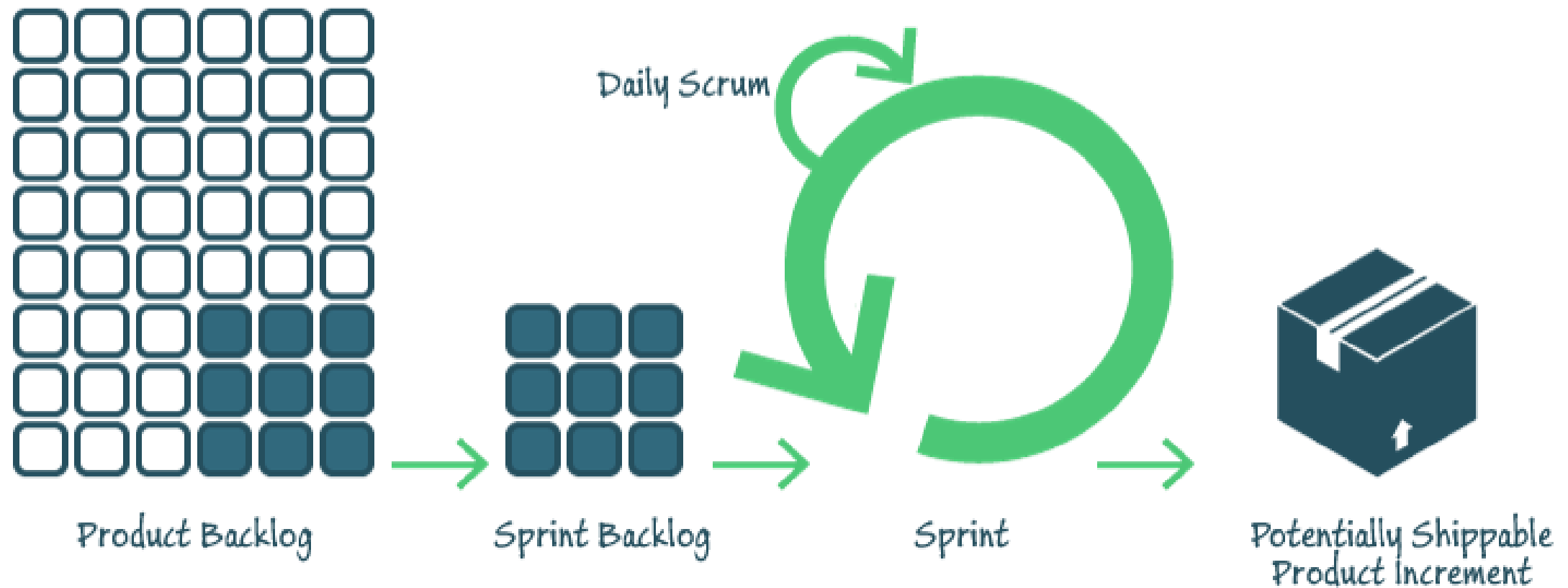
Scrum

- agile project management **YES!**
- a rugby huddle **NO!**

Sprints

- short cycles of activity in dedicated teams

The Scrum Process



Key 3 Questions for Stand Up Scrum Meetings

What *did you do* since our last scrum meeting?

What *are you doing* during this sprint?

What *obstacles* are in your way?

Key 3 Roles on a Scrum Team

Product Owner – Key stakeholder with a vision who provides direction to the team for each sprint

Scrum Master – Facilitator who focuses completely on the process and helps eliminate obstacles

Team Members – 5-9 professionals with similar values, diverse backgrounds, and are jointly accountable for the results

Successful Scrum Teams

1. Have Intentional and Brief Stand Up Meetings
2. Work Transparently
3. Feel Joint Responsibility
4. Are Aware of Progress, Celebrate Wins, and Learn from Challenges

2019 NAIFA-Tennessee Scrum Teams' Areas of Focus

1. *Serving* existing NAIFA Members
2. *Recruiting* new NAIFA Members
3. *Enhancing the* NAIFA Member *Experience*



2019 NAIFA-Tennessee's Scrum Teams

Product Owner
for all 3 scrum teams

2019 NAIFA-Tennessee President
John D. Richardson, RICP[®], LACP[®]



2019 NAIFA-Tennessee's Scrum Teams



Scrum Team #1: Serving NAIFA Members

Scrum Master for the
serving existing NAIFA Members
Scrum Team

2016-2017 NAIFA-TN President
2019 Senior RVP (Middle TN)
Marc Lewis, LUTCF, LACP[®], FSS



2019 NAIFA-Tennessee's Scrum Teams

Serving NAIFA Members

Scrum Team Members include Association Executive **Cathy Balkcom**, 3 Senior RVPs, and 3 Junior RVPs



2019 Goal:

Retain 90% of existing
NAIFA-TN Members



2019 NAIFA-Tennessee's Scrum Teams



Scrum Team #2: Recruiting NAIFA Members

Scrum Master for the
recruiting new NAIFA Members
Scrum Team

2019 NAIFA-TN President-Elect
and Membership Chairman

Karen Byrd

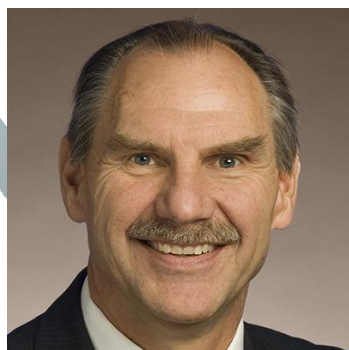
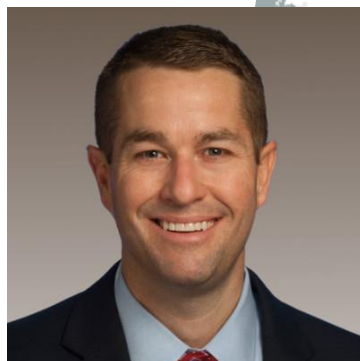
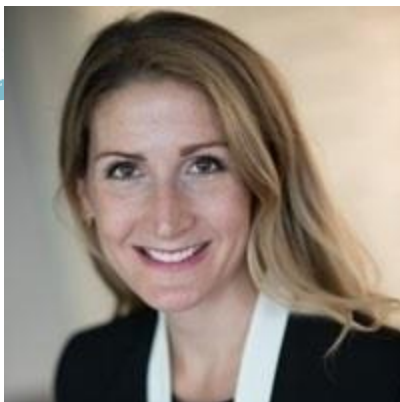
2019 NAIFA-Tennessee's Scrum Teams

Recruiting NAIFA Members

Scrum Team Members include 2019 NAIFA-TN Secretary, YAT Chairman, Independent Advisor Chairman, APIC Chairman (State), APIC Chairman (Federal), and Government Relations Chairman

2019 Goal:

Recruit 100 new
NAIFA-TN Members



2019 NAIFA-Tennessee's Scrum Teams

Scrum Team #3:

Enhancing the NAIFA Member Experience

Scrum Master for the
enhancing the NAIFA Member
Experience
Scrum Team

2015-2016 NAIFA-TN President 2019
NAIFA-TN National Committee
Person

Cindy Moyers



2019 NAIFA-Tennessee's Scrum Teams



Enhancing the NAIFA Member Experience

Scrum Team Members include 2019 NAIFA-TN Treasurer, Non-Dues Revenue Chairman, LILI Chairman, and IFAPAC Chairman

2019 Goal:

Generate \$20,000 in recurring non-dues revenue

2019 NAIFA-Tennessee Scrum Teams' Progress Report

Scrum Team #1: Serving NAIFA Members

1. Personally called all NAIFA-TN members
2. Emails are regularly sent to members about upcoming Affiliate meetings and NAIFA-TN Events
3. Reply to NAIFA-TN members requests within 24 hours
4. Proactively focusing on challenging membership areas in the state

Results: Current NAIFA-TN Member Retention Rate 77%

2019 NAIFA-Tennessee Scrum Teams' Progress Report

Scrum Team #2: Recruiting NAIFA Members

1. Intentionally connecting with centers of influence at key companies
2. Have a membership recruitment table at all Affiliate meetings
and all NAIFA-TN events
3. Publicly recognize new NAIFA members with a pinning ceremony

Results: Recruited 33 new members, 20 new members at
NAIFA-TN's Day on the Hill / Sales Summit in March 2019

2019 NAIFA-Tennessee Scrum Teams' Progress Report

Scrum Team #3: Enhancing the NAIFA Member Experience

1. Intentionally contacting local businesses to form strategic non-dues revenue partnerships with NAIFA-TN
2. Emily Cabbage (NAIFA home office representative) gives a 15 minute NAIFA National update during our monthly NAIFA-TN Zoom board meetings. NAIFA-TN board meetings last only 1 hour.
3. Results: Renewed excitement, re-engagement of many NAIFA-TN Past Presidents, 7 “New-NAIFA” focused members in 2019 LILI Class

SCRUM
The Art of
Doing
Twice
the Work
in Half
the
Time

JEFF SUTHERLAND
Co-creator of Scrum
J.J. SUTHERLAND

Advocate. Educate. *Differentiate.*

To learn more
about *scrum*,
read this book as
soon as possible.

Thank you for your time!



John D. Richardson, RICP[®], LACP[®]

2019 NAIFA-Tennessee President

2019 NAIFA National YAT Committee Chairman

2018 NAIFA YAT Leader of the Year

Cell (615)419-4140

John.Richardson@BoundbrookAdvisors.com

Session 1 Wrap Up

We'll Be Right Back



Suzanne Carawan
AVP, Marketing &
Membership

Marketing & Membership Update

Suzanne Carawan

2019 Membership Program

- Membership Program Roll-Out (Dennis Cuccinelli, MGC & SC) with Membership Promise Presentation Standardization and the Power of the Pin
- Growth Kits including Online Join/ Promo Kits for Programs
- Main Street USA *****Get Your Video!**
- [AdvisorsYouCanTrust.org](https://advisorsyoucantrust.org)
- NAIFA 20/20 Member Experience Onboarding & Retention



Advocate. Educate. *Differentiate.*

Advisor Ambassador Program: John D. Richardson

Low Cost Lead Gen allowing for Opportunities to Differentiate Powered by
Zoom

Designations & Certifications

Ring the Bell!



LUTCF: Updates



- Marketing campaign to young advisors as great 1st designation
- 2 LUTCF Scholarships Available! Deadline is June 1
- Fall 2019– Live, but virtual, moderated LUTCF classes will be available across the country powered by Zoom
- Promo Kits: underway

LACP: Updates



- ACCREDITED!
- Press Release TBD but ASAP
- Corporate Partners Ready to Be Contacted
- Fill the July Exam! Seats are Now Available! June 1st is Deadline!

LECP: Carroll Golden, Executive Director

Covering the Continuum of Long Term Care

LECP Updates

- Launched at ILTCI in March 2019
- Pay-to-play
- Founding Sponsors are Thought Leaders in the Industry
- Online Hub of Commentary, Content & Contacts

Level Up Roadshow: The Advanced Markets Center

2019 Plans

Level Up Roadshow

- August 22nd: Dallas
- Week of October 14th: Charlotte
- Philadelphia: TBD
- 2020 Schedule

Level Up Roadshow

- Panel of speakers
- Seat price or buy table
- Sponsorships
- Livestreamed to regional markets only
- Non-member pricing is higher



Advocate. Educate. *Differentiate.*

NAIFA Live



Advocate. Educate. *Differentiate.*



Drew DeWitt
President, Minnesota Chapter

Getting Started



- Submit NAIFA Live Chapter Enrollment Form
- Have kickoff call with SET rep
- Line up and report watch party locations



Advocate. Educate. *Differentiate.*



**NAIFA Live June 20th
Featuring Robert Cohen**

"The Gotchas and Trap Doors of
Life Insurance"



**NAIFA Live July 18th
Featuring Curtis Cloke**

"Cracking the Retirement Code"



2019 Performance + Purpose

Orlando

GET READY

📅 September 11, 2019 @ 09:00 am
📍 Orlando, FL

[Schedule](#)[Register](#)

120

Days

1

Hours

28

Minutes

33

Seconds

Big Ideas Workshops

The Big Ideas Workshop series features dynamic speakers that will address the audience from both the mainstage and then in deeper dive sessions. Asking you to change your frame of reference, Big Ideas Workshop speakers are selected for their knowledge & ability to incite your curiosity and desire to perform at the next level.



differentiate.

Big Ideas Workshop Speakers



conference.naifa.org



Advocate. Educate. *Differentiate.*

Zoom Partnership

Technology Connecting NAIFA

Zoom & NAIFA

- Every major initiative launched since 2018 relies on Zoom
- Real-time video now powers all committee meetings
- Zoom powers NAIFA Live—allowing us to hold a new format of monthly meetings and provide top quality education

Demand for Zoom

- Staff started asking
- Chapters started asking
- Members started asking



Advocate. Educate. *Differentiate.*

Meet Sandon Olson, Jr. at Zoom

Our Finserv Network Alliances Account Manager

About Zoom

- NASDAQ: ZM \$72/share
- Headquartered in San Jose, CA, global offices
- Best IPO of the Year
- 1300 employees
- FinServ Enterprise Team & Network Alliances Team (Sandon)
- Clients You Might Know

Zoom Packages

- Meetings
- Webinars
- Zoom Rooms

NAIFA-Zoom Partnership

- New! Chapter Benefit
- New! Member Benefit
- New! Non-Dues Revenue Share per Agreement

How Does It Work?

New Subscriptions:

- Call NAIFA's Member Services Team
- Issue a NAIFA code
- Get discount instantly, NAIFA receives check quarterly



Advocate. Educate. *Differentiate.*

NAIFA Shop

#NAIFAproud



SHOP NOW



APPAREL

BUSINESS GIFTS

**DISPLAY & PRINT
MATERIALS**

PROMO ITEMS

WELCOME TO THE MEMBER PROMO SHOP

ENJOY THE BEST-SELLING COLLECTION OF NAIFA BRANDED MERCHANDISE TO ENHANCE YOUR BUSINESS



Advocate. Educate. *Differentiate.*

NAIFA Leadership

#NAIFAproud

Brand Architecture: NAIFA Leadership

Promise

NAIFA helps insurance professionals, financial advisors, partners, and the people they serve find confidence in an ever-changing world.

Key Messages

- As one unified NAIFA, we stand up for equal access to sound advice and advocate for the policies that help everyone —regardless of wealth—create more secure, prosperous futures.
- With deep, long-term relationships in communities large and small, NAIFA helps connect the dots between what communities need and how policymaking can best enable the important work of insurance professionals and financial advisors in those communities. For 129 years, we’ve made it possible for members to share their stories with both state and federal policymakers, creating a legislative environment that enables members to do what they do best more easily, no matter where they practice.
- With local and state chapters, we make it possible for members to connect by geography or specialty, exchange ideas, and solve urgent problems together. As a result, NAIFA members have been shown to outperform peers by 64% in premium volume.
- By pooling our collective knowledge, we help insurance professionals and financial advisors better adapt to the changing needs of their customers and communities. Our Professional Pathway is just one example of how we’re making it easier for members to cut through the clutter, and learn the skills that matter to them and the people they serve.
- Ultimately, we are stronger, more resilient, and more capable together. Working together as one NAIFA community, we can help members and those they serve spend less time worrying and more time enjoying each day and looking forward to what’s next.

The Blue Squad


- Brand for the Leadership
- Identify quickly who is all in and driving NAIFA forward
- Identifiable across events, meetings, geography
- Offer a point-based system for rewards
- Select vs elect to identify new volunteers



ASK THE BLUE SQUAD

MEMBERSHIP PAGE

How the “Questions” campaign can be used at point of contact for members and potential members



National Association of Insurance
and Financial Advisors

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HOME

Why Join NAIFA

The Community that Cares.

NAIFA members are advisors that focus first and foremost on client care. Satisfaction comes from providing guidance to families who are seeking financial wellness. A NAIFA advisor is a person who continuously strives to improve and gives back to the local community, or what we refer to as [Main Street USA](#).


NAIFA advisors are the closest to the consumer. Our membership is made up of all sorts of advisors that practice at the kitchen table, at local coffee shops, in board rooms and in offices that bear their name on the shingle. Advisors seek out NAIFA to surround themselves with like-minded people, to further their professional development and to increase their professionalism in their practice, advocacy efforts & community involvement.

Our NAIFA community spans all 50 states and US territories. Despite the diversity found in the type of work that our members are doing, the characteristics of who joins NAIFA are the same.

NAIFA Members

- value personal leadership & have typically held leadership roles throughout their life in school, sports & the community
- wholly support the American values of life, liberty & the pursuit of happiness
- value the democratic process and actively understand the power of their voice & vote
- are dedicated and determined to create unique solutions that are optimal for each client
- passionately pursue personal & professional excellence

HOW DO YOU KNOW WHEN
RULES AFFECT YOUR
CLIENTS? (AND HOW DO YOU
KNOW WHEN THEY'RE NOT
RULES ANYMORE?)



ASK
THE BLUE
SQUAD

JOIN NAIFA


NAIFA Members to Convene for Congressional Conference

APRIL 23, 2019

Sen. Chuck Grassley and Rep. Jackie Walorski will be among the speakers when NAIFA members convene for the seventh annual [Read More](#)

ADVISORS PAGE

How the “Questions” campaign can be used at point of contact for members and potential members



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and Financial Advisors

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WHY JOIN NAIFA >

Payment Options

MAIN STREET USA >

ADVISOR AMBASSADOR PROGRAM >

WELCOME NEW MEMBERS >

NAIFA 20/20 MEMBER EXPERIENCE >

NAIFA LIVE ON DEMAND >

EARLY CAREER / YOUNG ADVISORS >

INDEPENDENT ADVISORS >

CORPORATE SUPPORT >

PREFERRED PROVIDERS: MEMBER-EXCLUSIVE SERVICES >


REFER A PROSPECT >

Membership Day

Membership Development Through The LUTCF® Designation Program

Photos: Members Recruiting Members

Independent Advisors



NAIFA is the only organization serving and representing insurance and financial advisors regardless of the products they sell or the focus of their practice.

NAIFA Members are:


- Insurance agents
- Financial Advisors
- Multiline Agents
- Health Insurance and Employee Benefits Specialists
- Both Captive and Independent Advisors
- New to the Business, Industry Leaders and Everyone in Between.

NAIFA is your professional association, and its focus is to help protect your business, help you grow your business and promote ethical business conduct.

NAIFA Helps You Grow Your Business

NAIFA offers more than 50 professional programs and products to enhance skills and provide value-added business services. NAIFA's educational offerings are unsurpassed, and NAIFA's Practice Resources offer everything an agent or advisor

HOW CAN YOU SIT ACROSS FROM YOUR CLIENT AND CONFIDENTLY PLAN FOR 50 YEARS FROM NOW?



ASK THE BLUE SQUAD

JOIN NAIFA

NAIFA Blog

NAIFA Members to Convene for Congressional Conference

APRIL 23, 2019



ALTERNATE LINES

WILL LONG-TERM
CARE BE THERE IN
THE LONG TERM?



ASK
THE BLUE
SQUAD

JOIN NAIFA

HOW DOES A SINGLE
INDEPENDENT
ADVISOR STAND UP
TO 535 MEMBERS
OF CONGRESS?



ASK
THE BLUE
SQUAD

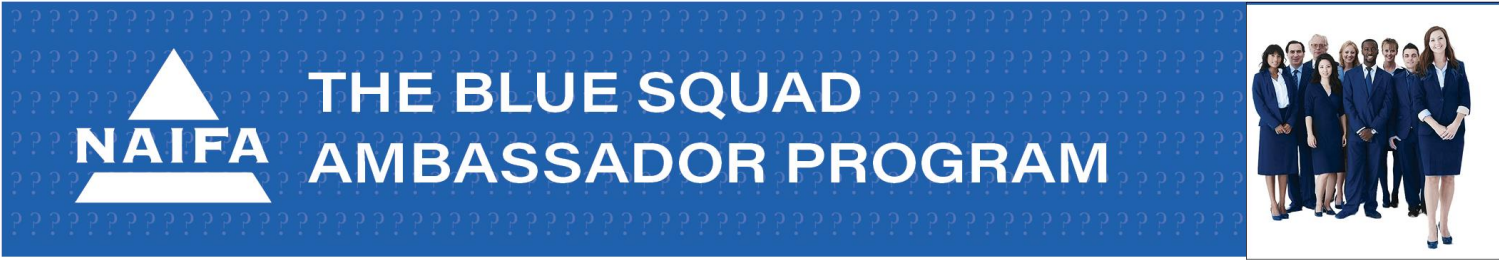
JOIN NAIFA

HOW DO YOU
PUT ALL YOUR
CLIENTS' CHILDREN
THROUGH COLLEGE?



ASK
THE BLUE
SQUAD

JOIN NAIFA



Now Recruiting: Spring 2019 Classes

At NAIFA, we’re all about strengthening the insurance and financial services industry by helping advisors grow their knowledge and be their best at serving clients.

That’s why we’re offering you – the non-member – free access to NAIFA’s advisor development program so you can learn from the best while sampling professional benefits that come with NAIFA membership.

For just 30-minutes a week, join NAIFA leaders for live strategic discussion, industry insight and advice to put you on a path to success.

May: Tuesdays @ 12 pm Eastern

Register

First name

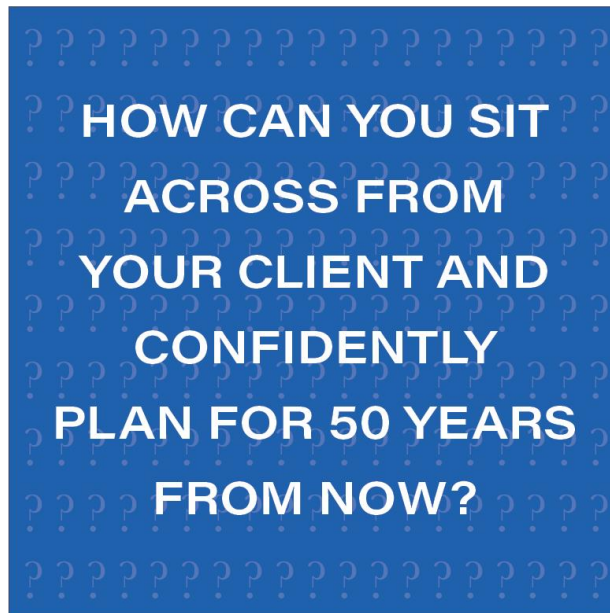
Last name

Company name

Email*

BANNERS ON SITE

How the “Questions” campaign can be used at point of contact for members and potential members



BLUE SQUAD HOTCHICKS

Wear NAIFA-branded blue hats or large lanyards at conferences, etc. – Ask the Blue Squad for any details.

- Blue Squad swag giveaways at conferences could include hats, portfolios, etc.
- Blue Squad awards for members who show the most support to one another.
- Invite members to become part of Blue Squad Elite, a team of members who offer detailed help on specific topics. Create special pins for these members.





Advocate. Educate. *Differentiate.*

ALL IN