

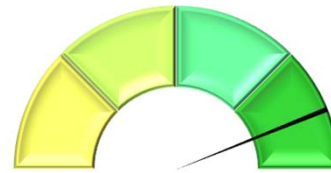


NAIFA 20/20 Federation Leadership Report

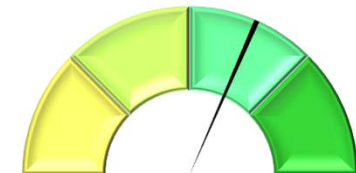
Short Fiscal Period 2018 (September – December 2018)

Guidelines to Ratings

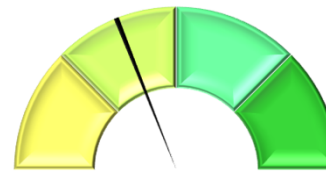
The NAIFA 20/20 Federation Leadership Report is a quarterly, high-level snapshot of our progress toward the execution of the NAIFA 20/20 Strategic Plan. In this report, NAIFA headquarters staff outlines pertinent updates correlated with the goals in the FY 2019 NAIFA 20/20 Business Implementation Plan.



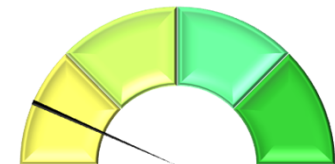
1st Tier
On target to exceed projected goals and milestones.



2nd Tier
On target to meet major expectations and achieve sought out goals and milestones.



3rd Tier
Slightly behind expectations – may need to pivot or refocus resources due internal/external occurrences.



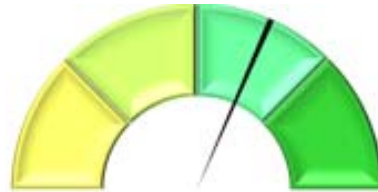
4th Tier
Goals and milestones are not within reach for the predetermined timeline and need reassessment.

Executive Overview – Sept through Dec 2018

Goal A: Empowerment



Goal B: Business Model



Goal C: Financial Model



- **Empowerment:** NAIFA will empower our members by bolstering our advocacy, broadening diversity within our organization, developing top-notch training programs and increasing public awareness.
- **Business Model:** NAIFA will improve our business model by strengthening the NAIFA infrastructure, enhancing activity among the entire federation, creating a quality member experience, and increasing total membership.
- **Financial Model:** NAIFA will execute revenue tactics to better our financial health by developing a more cohesive dues structure, refining our revenue sharing model, and diversifying NAIFA's revenue portfolio.

Goal A: Empowerment



Key Accomplishments

- Successfully held Performance + Purpose Conference in San Antonio with widespread support and enthusiasm.
- Expanded partnerships with NAAIA, LAAIA, and WIFS.
- Developing plans to offer Advanced Practices events in various US cities with SFSP.
- Increased average PAC contributions as well as saw success in PAC-supported candidates being elected.
- Held National Advocacy Meeting to enhance our advocacy presence in DC.

Concerns and Challenges

- Transition to new structure may distract local and state leaders from other critical activities.
- Need greater PAC administrative funds to cover operating costs.
- Competing priorities created delays in launching LECP Center.
- Will need to explore alternatives to expand LUTCF abroad.
- NCCA accreditation for LACP delayed until Spring 2019.
- AMS transition and data quality impact operations and programs.

Major Tasks for Next Quarter

- Assisting state and local chapters in ensuring quality deliverables throughout their areas of jurisdiction, fulfilling the promise and potential of NAIFA 20/20.
- NAIFA rebranding campaign in development for presentation in Q2.
- Submitting LACP for accreditation and exploring new models for LUTCF distribution.
- Begin data cleanup and transition of AMS platform from iMIS to Your Membership.

Goal B: Business Model



Key Accomplishments

- Growing participation and support from companies for NAIFA, resulting in greater financial and membership opportunities.
- New onboarding program for new and returning NAIFA members.
- Leveraging technology to enhance member communications and programming through streamlined newsletters, Zoom technology, and increased visibility in trade and other publications.
- Restructured staff to include a chapter-focused servicing department and a revenue production-focused department.

Concerns and Challenges

- Developing understanding of the new structure and roles for chapters has caused distractions in some states and locals as the new model is implemented.
- Need to identify more NAIFA champions within each company, and each region of the country, to help promote NAIFA membership and engagement.
- Need to define a more compelling brand image as part of NAIFA 2.0 rebranding and marketing initiative.
- AMS and data quality issues impede greater effectiveness of programs and initiatives.

Major Tasks for Next Quarter

- Continue to implement new NAIFA structure with quality programming provided to members in every state and locality.
- Mitigate against membership losses due to transition issues.
- Begin AMS transition from iMIS to Your Membership.
- Develop nationally-led efforts to recruit members and onboard new members effectively into NAIFA.

Goal C: Financial Model



Key Accomplishments

- Grew corporate sponsorship from existing sponsors as well as added several new companies to sponsor list.
- Transitioned systems to implement new uniform dues model, effective January 1, 2019.
- Reviewed and updated investment policy to better ensure proper returns for NAIFA and safeguard assets.
- Launched new member onboarding programs to help boost retention and recruitment.

Concerns and Challenges

- Transition issues may cause greater membership attrition.
- Need greater funding to meet all political goals plus cover administrative expenses of the PAC.
- Data quality and resources impact effectiveness of planned growth and enhanced services initiatives.
- LACP accreditation and LUTCF Asia launch present opportunities or possible obstacles toward diverse revenue model goals.

Major Tasks for Next Quarter

- Concentrated focus on membership recruitment and retention by new Marketing & Business Development department.
- Assist states and locals in transition to new structure, minimizing membership attrition.
- Expand partnerships with industry groups to result in increased membership and/or operating efficiencies.
- Robust promotion of company landing pages to encourage advisors and agents to join NAIFA through corporate program.

NAIFA BY THE NUMBERS

87%

**New Congress members with
a NAIFA contact.**

50K

**New funds committed
toward Cap 50 Fund.**

89%

**PAC Supported Candidates
won election.**