

# Differentiate.

The trusted advisor.

NAIFA members adhere to a code of ethics that's about honesty and integrity, and we're proud to tell consumers that our members are advisors they can trust.

As a NAIFA member, you belong to an organization that's been advising Americans for more than 125 years. You stand out as a thought leader in your business, and an innovator in providing solutions to your clients.

You also are featured on NAIFA's website, [www.AdvisorsYouCanTrust.org](http://www.AdvisorsYouCanTrust.org), where the news media and consumers go for the latest news, tips and trends on strategies and products that will help secure America's financial futures.

Join NAIFA to stand out among your peers as a thought leader through media exposure at the local and state level, and through opportunities to contribute content to NAIFA's media platforms and webinars, and serve as a speaker at industry meetings and events.

Be visible as an influencer. Make sure clients know that you are an advisor you can trust. **Join NAIFA today.**



#NAIFAProud

[www.NAIFA.org](http://www.NAIFA.org)



Advocate. Educate.  
***Differentiate***

NAIFA's Membership Promise





# Advocate.

The protective advisor.

## NAIFA's advocacy success is second to none in insurance and financial services.

The research arm of the *National Journal* validated what every NAIFA member knows: NAIFA is viewed by policymakers as the most credible, valued and respected voice in the industry. With a NAIFA member in every Congressional District, no other organization comes close to rivaling NAIFA's grassroots efforts.

NAIFA's PAC is the largest among all insurance and financial-services groups. That ranking doesn't include the additional work IFAPAC and our state PACs do every day, helping represent advisors and the industry in all 50 state capitals.

## NAIFA protects our business. Among our recent advocacy successes:

- The tax reform law made no changes to the taxation of life insurance and annuity products, and it did not place stricter limits on pre-tax contributions to retirement plans or Individual Retirement Accounts.
- The Fifth Circuit Court of Appeals vacated the Department of Labor's

fiduciary rule. NAIFA worked with members of Congress, regulators and the federal courts to ensure the rule did not destroy the business of insurance and financial advisors or prevent lower- or middle-income Americans from getting retirement products and advice.

- The Senior Safe Act was signed into law. NAIFA's advocacy helped ensure the law provides bona fide benefits for older investors while protecting advisors acting in good faith from liability and other potential consequences.

## Educate lawmakers at one of the largest industry Congressional Conferences in Washington.

- Each May, nearly 1,000 NAIFA members attend the Congressional Conference to educate lawmakers about the role the industry, our products and services have securing the financial futures of 90 million Americans.
- Be a part of the largest advocacy event in insurance and financial services. Join your fellow members and tell your clients of your commitment to represent Main Street America on Capitol Hill.

# Educate.

The thinking advisor.

## NAIFA is always creating new professional development offerings to elevate your knowledge, your confidence, your skills and your productivity:

- **NAIFA Live** presents high-quality speakers and programming during monthly educational and networking events hosted by state chapters. Many are eligible for CE credits. Attend in-person or virtually.
- **The NAIFA Limited & Extended Care Planning Center** is a virtual center to equip agents and advisors with information, designation and educational resources on trends and issues affecting the care industry and consumers.
- **Thought Leadership Centers in areas of Diversity & Inclusion and Advanced Markets** advance our industry and membership development with resources and case studies in sales and marketing, recruitment and training and personal leadership.
- **The NAIFA Professional Pathway** will put you on the right path to success with a dynamic, online, self-assessment tool linked to a comprehensive set of professional standards to help you assess where you are and what you need to do to take your practice to the next level.

Invest in your education, earn professional designations, and build your network with NAIFA membership so you will reach your potential and guide your clients to financial security.



Your mission is to **grow** your business. NAIFA's mission is to **support** you in every step of your career.

