



ARE YOU YAT MATERIAL?

Joining NAIFA shows support for your profession, an investment in your future and dedication to your clients. Being a part of YAT shows a whole-hearted commitment to your own personal success as well. It shows you understand ROI and you know how to invest wisely in your own career.

To find the YAT group nearest you or to learn how to start your own, contact:

NAIFA's Member Service Center at 877.866.2432 (877-TO-NAIFA), email yat@naifa.org, or visit:

www.naifa.org/yat

MEMBERSHIP BENEFITS PROFESSIONAL DEVELOPMENT

Networking opportunities

- ▲ Young professional networking events
- ▲ NAIFA's Career Conference & Annual Meeting
- ▲ State and local meetings and events
- ▲ NAIFA Netsite (online social networking)

Individual attention and mentoring

- ▲ Local association mentoring programs
- ▲ NAIFA Coach and NAIFA Mentor Center

Education and professional development programs tailored to your career stage

- ▲ NAIFA's Professional Development System (PDS)
- ▲ NAIFA Professional Programs
 - Life Insurance & Annuities Series
 - Health Services & Employee Benefits Series
 - Multi-Line Series
 - Financial Advising & Investments Series
 - Practice Management Series
- ▲ NAIFA's Career Conference & Annual Meeting
- ▲ Programs-in-a-Box and other continuing education credit programs offered through your state and local associations
- ▲ NAIFA prospecting, marketing & sales system

Enhanced leadership skills

- ▲ NAIFA's Leadership in Life Institute (LILI)
- ▲ Volunteer opportunities with NAIFA
- ▲ NAIFA's Online Leaders Training Center

Increased client trust & respect

- ▲ NAIFA's Code of Ethics, which connotes a certain performance standard that is reassuring to clients

Industry recognition

- ▲ NAIFA's Industry Awards Program

Discounts on programs leading to industry designations

- ▲ NAIFA's alliances with The American College, AHIP and including the American Institute for CPCU, enables members to earn multiple professional designations:
 - LUTCF
 - CFP™
 - FSS
 - CPCU
 - CLU®
 - RHU
 - ChFC
 - LTCP

PRACTICE RESOURCES

Sales tips and industry news

- ▲ YAT Chat
- ▲ NAIFA Podcasts
- ▲ NAIFA's *Advisor Today*
- ▲ NAIFA Connections
- ▲ NAIFA's Career Conference & Annual Meeting
- ▲ NAIFA's Speakers Online Library

Tools to build your business

- ▲ NAIFA Virtual Library
- ▲ NAIFA Communications Corner
- ▲ NAIFA Sales, Prospecting, and Marketing Tools

Reduced expenses

- ▲ Discounted products and services through NAIFA Preferred Providers programs:
 - Insurance programs
 - Business/management tools
 - Client management tools
 - NAIFA Bookstore
 - Sales tools
 - Office supplies & equipment
 - Credit card program
 - Shipping services
 - Car rental services
 - Wardrobe discounts and more!

ADVOCACY

Opportunities for involvement

- ▲ Make a contribution to NAIFA's IFAPAC at a lower rate through the YATPAC initiative if you are a first-time contributor

Personal advocacy on Capitol Hill and in your own backyard

- ▲ NAIFA's Legislative Action Center
- ▲ NAIFA's Political Action and Involvement Committees
- ▲ State and local NAIFA lobbying efforts

Timely updates and grass-roots mobilization messages

- ▲ **GovTalk:** NAIFA's bi-weekly e-mail covering advocacy issues
- ▲ **GovWatch:** a summary of breaking legislative and regulatory news
- ▲ **GovAlert:** tells members when to contact their legislators on issues of importance
- ▲ **GovPod:** podcasts on important current advocacy issues
- ▲ **GovWeb:** a series of webinars to provide NAIFA members with timely legislative updates.
- ▲ NAIFA's Federal & State Legislative Grid



RESOURCE GUIDE





YAT IS ADDED VALUE

When you're new to a profession, you deserve a little extra help to get you started. That's why NAIFA started its Young Advisors Team. As part of YAT, you not only enjoy all of the benefits NAIFA offers, but you also have access to several services designed only for those early in their career – and all for no additional cost.

As an insurance and financial professional early in your career, you are learning quickly that you need connections to land clients and grow your practice. The faster you learn and the more contacts you make, the greater your chance of success.

The National Association of Insurance and Financial Advisors (NAIFA) recognizes your need for connections that count. As a professional who is 40 or under or within the first five years in the business, you qualify to take advantage of one of the greatest connection opportunities NAIFA has to offer. NAIFA's Young Advisors Team (YAT) is dedicated to serving the needs of the organization's next generation of members. Through customized education, opportunities to network and work with a mentor, practice resources and unwavering advocacy support, NAIFA's YAT program ensures you have the tools to build a solid foundation for a successful career.

This Practice Resource Guide is designed to introduce you to the services and benefits that are available through YAT.

**FOR MORE
INFORMATION ON
ANY PROGRAM, VISIT
WWW.NAIFA.ORG/YAT**

As you start your career, you want to have as many opportunities as possible to learn the trade and connect with colleagues. Count on NAIFA for these specific benefits:

- ▲ **Networking opportunities**, including events in your local association and the National Career Conference & Annual Meeting
- ▲ **Professional programs** that are customized to meet your specific needs and interests, covering topics such as:
 - Life Insurance and Annuities
 - Health Insurance & Employee Benefits
 - Multi-line
 - Financial Advising and Investments
 - Practice Management
- ▲ The chance to **enhance your leadership skills** through one of NAIFA's state-run Leadership in Life Institutes (LILI)
- ▲ Professional and moral **guidance** from NAIFA's Code of Ethics, which helps to develop client trust
- ▲ **Discounts on certification training** including LUTC through NAIFA's affiliations with The American College, AHIP, and AICPCU
- ▲ **NAIFA Sales System** online skills training with coaching support and NAIFA Sales, prospecting, and marketing tools
- ▲ **NAIFA Coaching Programs** to help you take your practice to the next level

For more information on all of NAIFA's YAT-specific professional development benefits, visit:

www.naifa.org/yat

PROFESSIONAL DEVELOPMENT

Let NAIFA be your resource for industry trends, sales tips and practice management advice as you work to build your practice. YATs can take advantage of these benefits:

- ▲ **News on the go** that addresses issues specifically important to younger **professionals** with two electronic newsletters: *YAT Chat* and *NAIFA Connections*
- ▲ **Great sales ideas** from NAIFA's *Advisor Today*, the association's monthly magazine, and NAIFA podcasts
- ▲ **NAIFA's Virtual Library** of professional practice tools and tips, including sample marketing materials, newsletters and sales presentations, sample client presentations, fact finders, concept pages and specimen documents
- ▲ NAIFA's Preferred Provider Program offers **discounts on industry management and sales tools, errors and omission (E & O) insurance and office supplies and shipping services**

For more information on the resources available to help you grow your business, visit:

www.naifa.org/yat

PRACTICE RESOURCES

No matter what stage you're at in your career, NAIFA is fighting for your future. The energy and enthusiasm offered by YATs has been critical to NAIFA achieving its political agenda in the past, and we want help from more members like you in the future. NAIFA makes it easy for YATs to be active in its advocacy efforts through:

- ▲ **Lower contribution requirements** to NAIFA's IFAPAC through the YATPAC initiative for first-time contributors
- ▲ **Mobilization messages and information** on topics of interest through:
 - **GovPod**, monthly podcasts on important current advocacy issues
 - **GovTalk**, the organization's online advocacy newsletter
 - **GovWatch**, a summary of breaking legislative and regulatory news
 - **GovAlert**, which lets members know when their voices need to be heard
 - **GovWeb**, a series of webinars to provide NAIFA members with timely legislative updates.
 - NAIFA's Federal & State Legislative Grids, which tracks key issues for members
- ▲ **Organizing grassroots lobbying efforts** on issues that affect our members, such as our opposition to Stranger-Originated Life Insurance (STOLI), a practice that preys upon senior citizens and abuses the true intent of life insurance

For more information on how you can get involved in NAIFA's advocacy efforts, visit:

www.naifa.org/yat

LEGISLATIVE ADVOCACY