



21 UPDATE

CONNECTIONS THAT COUNT

Issue 2 | February 29, 2008

NAIFA is pleased to announce the following improvements to our value proposition brought to you by NAIFA 21, enhancing your bottom line. This update will provide brief snapshots of our progress toward achieving the vision of NAIFA in the 21st century. The person with chief responsibility for NAIFA 21 implementation is the Deputy CEO, Susan B. Waters, EDM, CAE. Reach Dr. Waters at swaters@naifa.org or 703-770-8102.

[Advocacy](#) | [Education & Sales Training](#) | [Communications](#) | [Membership Marketing](#) | [Networking](#) | [Governance](#)

ADVOCACY: IMPACT TRAINING

Strategy/Tactic: NAIFA and AALU have pledged greater cooperation and collaboration on legislative and regulatory matters affecting our industry. As part of a new agreement, AALU agreed to train 50 NAIFA members each year for five years in its IMPACT program, which is intensive training in legislative advocacy for non-lobbyists. The first 17 NAIFA members participated in IMPACT training in February.

Value/Benefit: Better trained members are better equipped to be effective advocates on behalf of our members and our industry.

When: The initial IMPACT training was February 7–8, 2008. The next IMPACT training is scheduled for fall 2008.

For more information or to join the conversation, contact:

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ADVOCACY: OPTIONAL FEDERAL CHARTER EDUCATION

Strategy/Tactic: NAIFA's Policy Formation Subcommittee is reviewing NAIFA's insurance regulatory reform policy and its position regarding proposed legislation to create an Optional Federal Charter for insurance companies and agents. The potential benefits of this legislation include increasing speed-to-market for products, improving the competitiveness of the insurance industry and simplifying producer licensing registration procedures. Potential drawbacks associated with this proposal are: that a federal regulator

will not be a positive change in the regulatory environment, that compliance issues for NAIFA members might worsen and that consumer protection may be reduced.

NAIFA's government relations team is conducting an information and education campaign on insurance regulatory reform (IRR) and modernization including the Interstate Compact, NARAB II and Optional Federal Charter. See

www.naifa.org/advocacy/frontline/advocacyupdates/20071121_treasury.cfm and www.naifa.org/newsevents/releases/20071030_hfss.cfm.

Value/Benefit: Insurance regulatory reform may have a significant impact on NAIFA members and NAIFA must carefully consider reform proposals to ensure that NAIFA members are well-protected in any regulatory environment. It is vital that NAIFA members understand the potential impact of insurance regulatory reform.

When: The NAIFA Board of Trustees will receive the Policy Formation Subcommittee's report in April.

For more information or to join the conversation, contact:

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ADVOCACY: ORGANIZATIONAL COLLABORATION

Strategy/Tactic: NAIFA has begun a series of meetings with organizations related to NAIFA or that have aligned or similar interests and concerns on the legislative and regulatory fronts. Recent meetings include the [National Association of Insurance Commissioners](#), the [National Association of Independent Life Brokerage Agencies](#), the Association for Advanced Life Underwriting and the [American Council of Life Insurers](#).

Value/Benefit: NAIFA 21 calls for stronger industry relationships to expand NAIFA's ability to represent our members, the industry and the clients of our members. These relationships revitalize and complement our ability to respond to legislative proposals and threats, educate those in public policy positions about the importance of insurance and financial security to the protection of American families and represent our members' interests.

When: Ongoing.

For more information or to join the conversation, contact:

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ADVOCACY: NAIFA PARTNERS FOR ADVOCACY

Strategy/Tactic: Online registration is now available for NAIFA Partners for Advocacy at <https://secure.naifa.org/pa/>. NAIFA Partners for Advocacy was launched to allow corporate non-managerial employees of home offices and broker-dealers and non-producing agency employees and support staff to participate in and contribute to NAIFA's advocacy efforts. By paying an annual fee of \$50 per participant, partners will receive communications from the Government Relations department, email updates and access to new articles on the *Advisor Today* website and additional email communications on federal issues.

Value/Benefit: NAIFA Partners for Advocacy will play a crucial role in influencing issues that are critical to our industry. This allows greater participation in the public policy and advocacy programs of NAIFA.

When: Online registration for NAIFA Partners for Advocacy began January 14, 2008.

For more information or to join the conversation, contact:

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EDUCATION & SALES TRAINING: VICE PRESIDENT OF PROFESSIONAL DEVELOPMENT AND EDUCATION

Strategy/Tactic: Diane Powers has joined the NAIFA team as Vice President of Professional Development and Education. She brings her experiences as Director of the American Institute of Banking, the national professional continuing education and training division of the American Bankers Association, and her experience as a consultant to entrepreneurs in start-up companies to building NAIFA's Professional Development System.

Value/Benefit: Powers will lead and accelerate growth and progress of the NAIFA Professional Development System outlined in NAIFA 21. The Professional Development System will give members access to education, sales training and support. With Powers in this leadership role, NAIFA will provide much needed assistance to the industry as it addresses workforce development challenges.

When: Powers joined NAIFA in February 2008.

For more information or to join the conversation, contact:

swaters@naifa.org – Susan B. Waters, EDM, CAE, Deputy CEO, NAIFA – (703) 770-8102

dpowers@naifa.org – Diane W. Powers, VP, Professional Development and Education, NAIFA – (703) 770-8226

EDUCATION & SALES TRAINING: RESOURCE LIBRARY

Strategy/Tactic: NAIFA will offer a professional development resource library to all members. This center will include client presentations, planning concepts, fact finders, business and estate calculators and tax information.

Value/Benefit: The resources in this online knowledge library will help to accomplish several of the goals and objectives set forth in NAIFA 21, matching the framework of the Professional Development System and meeting the needs of all agents and advisors regardless of practice specialty, distribution channel or career stage.

When: The NAIFA Professional Development Resource Library will be available online to NAIFA members only at www.naifa.org.

For more information or to join the conversation, contact:

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tshaw@naifa.org – Teri Shaw, Director, Affinity Programs, NAIFA – (703) 770-8225

EDUCATION & SALES TRAINING: DESIGNATIONS TRAINING

Strategy/Tactic: Through a new and improved partnership with The American College, NAIFA offers classroom training for the LUTC Fellow (LUTCF) designation and the Financial Services Specialist (FSS) designation. In addition, the Horizons program allows members to complete the CFP® Certification Curriculum while earning six courses toward the ChFC® and CLU® designations. Invest in your future by earning a professional designation through NAIFA and The American College.

Two new features, “NAIFA Schedule for the American College Online Classes” and “Find a Class” have been developed and added to the NAIFA website at www.naifa.org/benefits/education/professional.cfm. There are many more benefits to NAIFA members and NAIFA locals from this partnership. For a complete listing, see www.naifa.org/benefits/documents/NAIFA-TAC_0108.pdf.

Value/Benefit: NAIFA members can now locate classes offered by The American College online or within specified geographic areas and sorted by moderator or course number.

When: This feature is currently available.

For more information or to join the conversation, contact:

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sblodgett@naifa.org – Samantha Blodgett, Director, Education Programs, NAIFA – (703) 770-8216

COMMUNICATIONS: ASSISTANT VICE PRESIDENT OF COMMUNICATIONS

Strategy/Tactic: Lorri Lee Ragan, APR, has joined NAIFA as Assistant Vice President of Communications. Ragan has 21 years of experience in communications and public relations for associations, including the American Land Title Association, the International

Association of Convention and Visitor Bureaus and the American Society of Association Executives.

Value/Benefit: Ragan will play a vital role in executing the overall communications and marketing functions called for in NAIFA 21 and will be the publisher of the award-winning magazine, *NAIFA's Advisor Today*.

When: Ragan joined NAIFA in February 2008.

For more information or to join the conversation, contact:

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lragan@naifa.org – Lorri Lee Ragan, Assistant VP, Communications, NAIFA – (703) 770-8203

COMMUNICATIONS: MEDIA PRESENCE

Strategy/Tactic: NAIFA has stepped up its campaign for recognition in the media, particularly since Lee Allen has become Vice President of Communications. Efforts to be a trusted source for publications as well as to appear in print or other media are increasing, and results are beginning to be apparent. Recently *The New York Times*, *Wall Street Journal* and *Smart Money* magazine have contacted NAIFA, in addition to trade publications.

Value/Benefit: More visibility for NAIFA and NAIFA members will increase the reputation of insurance and professional advisors in the minds of consumers and the public, and help when representing the industry in legislative and regulatory matters.

When: Ongoing.

For more information or to join the conversation, contact:

leeallen@naifa.org – Lee Allen, VP, Communications and Marketing, NAIFA – (703) 770-8112

MEMBERSHIP MARKETING: CREDIT CARD PAYMENTS

Strategy/Tactic: A pilot program that accepts monthly credit card payments for the NAIFA dues investment from new members and former members whose membership has lapsed for more than six months is now under way. If successful, the monthly credit card option will be extended to all NAIFA members.

Value/Benefit: New and lapsed members may now choose their preferred method of paying the NAIFA dues investment: check, monthly bank draft, annual credit card payment or monthly credit card billing.

When: The pilot began on February 21, 2008.

For more information or to join the conversation, contact:

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MEMBERSHIP MARKETING: MEMBER RECRUITER

Strategy/Tactic: The NAIFA Board of Trustees has approved a pilot program that will pay a member recruiter on a commission basis. Costs will be shared by NAIFA and the participating state and local associations. This program appears several times in the NAIFA 21 Strategic Plan.

Value/Benefit: NAIFA and the federation benefit from strong membership that helps provide the resources necessary to provide benefits to members at every level and expands our numbers for legislative purposes. NAIFA 21 calls for this approach to be tested and, if successful, expanded.

When: NAIFA is seeking one or more states and locals to partner in this pilot program. It will begin as soon as possible.

For more information or to join the conversation, contact:

swaters@naifa.org – Susan B. Waters, EDM, CAE, Deputy CEO, NAIFA – (703) 770-8102

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MEMBERSHIP MARKETING: MEMBERSHIP GAME

Strategy/Tactic: NAIFA and Codewriters are offering “Membership Game,” a system designed to help members and association executives track and recruit lapsed and potential members. This tool will make it much easier to increase membership in NAIFA. To see how it works, go to www.membershipgame.com.

Value/Benefit: Membership Game is a powerful tool that will make our members more successful in member recruiting and retention.

When: The tool is available now. NAIFA is investing more money to expand and improve the system on an ongoing basis.

For more information or to join the conversation, contact:

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MEMBERSHIP MARKETING: MARKETING PILOT

Strategy/Tactic: NAIFA has entered into a contract with McKinley Marketing, Inc., a membership marketing firm in Washington, DC, that limits its client base to associations. This is the second phase of NAIFA’s plan to develop a standardized membership marketing approach and focuses on the fit between NAIFA and the local and state associations. A series of pilot programs will be developed and tested, with results compared for sustainability and effectiveness.

Value/Benefit: The lessons learned from the pilots developed with McKinley Marketing will be disseminated throughout the federation, improving our collective efforts to recruit and retain members.

When: The project was launched on February 22, 2008.

For more information or to join the conversation, contact:

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