



ABOUT THE Financial Security Champion Program

The Financial Security Champion Program was developed to acknowledge organizations for their commitment to NAIFA by allowing a set of individuals within the organization to participate in NAIFA as a group. Groups that participate in the program receive special recognition for their involvement, special benefits, and provide expanded advocacy support for the individuals within the group at both federal and state levels.



Dan Peterson, LUTCF,
LLIF, FIC
Fargo, North Dakota
Loyal Member Since 1992

Create a culture of excellence.

We chose to invest in NAIFA for our producers because we believe in putting our clients' best interests first which is what the NAIFA Code of Ethics states. Our producers that are members of NAIFA are committed to their clients, community, and the industry and get involved in grassroots advocacy to be the voice of their clients to legislators. We are extremely proud to support our advisors in belonging to their professional association."

Quick Facts:

- Decide if you want to include only your producers, or your producers plus administrative staff in your group package
- All members receive all the benefits and rights of full membership in NAIFA including IFAPAC contribution & grassroots advocacy

The Value to You:

- Organization gains recognition through promotion on the consumer site, organization is profiled in *Advisor Today* digital platform
- Advisors are rewarded for participation through publicity and organization receives extra recognition & preferred rates

Program Benefits

NAIFA's Financial Security Champions program is designed to be a win-win for organizations and their advisors. Offering all of the traditional benefits of NAIFA membership with the exclusive recognition of being a Financial Security Champion to the industry.

Group Billing at a Fixed Rate

Receive one bill for your entire team at a fixed rate.

Private Orientation & Advocacy Training Sessions

Explore all that NAIFA has to offer with a private orientation and special advocacy training session exclusively for your team.

Organization Profiled in Advisor Today blog

Let your talent shine on a national stage as we feature your organization in our blog with a distribution of more than 50,000.

Special Logo & Welcome Kit

Show your clients that your organization invests in their advisors & adheres to the highest level of care.

Logo Placement

Get recognized with your organization's logo on NAIFA's consumer site (financialsecurity.org) and within the NAIFA Members' portal.

Organization Offers

Receive discounts to professional development events, NAIFA Quality Awards, managerial training, and grassroots programs.

Agency Insurance Offers

Receive access to CalSurance Agency E&O insurance and Kelsey agency products to protect your advisors.

National, State & Local Membership

Your membership for your advisors includes access to events at all three levels of NAIFA.

Preferred Subject Matter Experts

Your advisors will be in a preferred pool of contacts for commentary, participation, writing and speaking opportunities offered by NAIFA.

HOW THE PROGRAM WORKS

1. Design a package to meet your organization's goals and choose your membership:
 - a. Producers Only
 - b. Producers and Administrative Professionals/CSR/Employees
2. Sign membership agreement outlining service and membership terms
3. Reconcile any current members to enter into group membership direct bill cycle
4. Organization onboarding includes kick-off call, press release, orientation & welcome kit

Learn More

Contact Randy Clark, Senior Director of Membership Outreach & Engagement at rclark@naifa.org or call 410.610.9695 (mobile) 703-770-8222 (office)

Or, drop an email to recruitment@naifa.org.