



Membership



ADVOCATE. EDUCATE. DIFFERENTIATE.

Joseph Schreck

ATLANTA, GEORGIA

2024 NATIONAL YOUNG ADVISOR OF THE YEAR

LOYAL MEMBER SINCE 2016

BELONG TO THE ONE & ONLY NAIFA

Your Professional Association

Belonging to your professional association establishes you as an individual who is committed to your career as a financial services professional. Through your membership, you will join a national network of performance-driven professionals who proudly adhere to a Code of Ethics, proudly engage in the democratic process to protect their businesses, and continuously seek self-development opportunities through education and servant leadership programs.

NAIFA's Fees Align with the Acceleration of Your Career

Year 1	Year 2	Year 3	Year 4	Year 5
\$10/month	\$20/month	\$30/month	\$40/month	\$68/month

plus \$1 processing fee

We understand that the first few years establishing your practice are challenging. NAIFA provides a ramp-up period in membership fees so that you don't have to wait to join until you're established to join your professional association. While NAIFA has accelerator programs for young advisors, individuals join NAIFA throughout the lifecycle of their career due to our advocacy & education programs that span practice areas and demographics. NAIFA is a multi-generational association that includes everyone who is invested in the financial security of Americans and chooses to belong.

In addition to membership categories for those practicing in regulated professions, NAIFA also offers membership categories for the following financial security professionals:

Administrative Professional	Industry Professional	Student
\$20/month or \$240/year	\$500/year	\$50/year

QUICK FACTS:

One fee covers membership at the national and state chapter level

Opportunities to meet & represent NAIFA with your state & federal policymakers with full training provided

Listed & promoted to consumers with opportunities to be profiled at www.financialsecurity.org

Opportunities to speak, write & volunteer at the state & national levels

Comprehensive membership benefit bundle including access to group health plans, E&O insurance, travel, and more

National network that includes financial advisors, attorneys, CPAs, insurance agents, financial coaches, experts in business practice management, marketing, and specialty areas.

www.naifa.org/join



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Advocate.

Since 1890, NAIFA is the only professional association that advocates at the state, interstate, and federal levels on behalf of financial services professionals.

- **Grassroots Training:** Earn your Financial Security Advocate badge to showcase to your clients that you advocate on their behalf
- **Legislative Action Center:** Learn about the bills that NAIFA is monitoring and access tools and resources for contacting your legislators
- **Congressional Conference:** NAIFA members come together for the industry's largest fly-in to advocate on behalf of their businesses, clients, consumers, and the industry in May of every year. Showcase pictures of you meeting your Congressional leaders and Capitol Hill photo to explain what you are doing for their financial futures.
- **GovTalk:** A monthly newsletter that summarizes the latest activity on Capitol Hill and other legislative activities impacting the industry so you can stay updated
- **Action Alerts:** NAIFA sends alerts to members when there is an opportunity to inform their legislator about a particular issue
- **Advocacy in Action Blog:** Stay current on the latest legislative action in our industry
- **IFAPAC:** NAIFA has a political action committee within every state and at the federal level



Educate.

Invest in your education and build your network with NAIFA so you can reach your potential and guide your clients to financial security. The Society of Financial Services is NAIFA's professional development arm and provides opportunities for you to elevate your knowledge, confidence, skills, and productivity.

- **NAIFA Live:** NAIFA's monthly meeting featuring top industry speakers giving sales & marketing ideas
- **LACP Certification & LUTCF Designation:** For agents and advisors to demonstrate industry and product knowledge
- **FSP Institute:** Immersive event to allow financial service professionals to come and learn from subject matter experts from a cross-disciplinary viewpoint
- **Apex:** Annual professional development conference that focuses on achieving peak performance
- **NAIFA Centers of Excellence:** Specialized content to meet the vast needs of our membership. Each Center offers webinars, blog articles, case studies, research, and access to subject matter experts
 - Advanced Practice Center
 - Business Performance Center
 - Employee & Executive Benefits Center
 - Limited & Extended Care Planning Center
 - Talent Development Center



Differentiate.

NAIFA provides members with ample opportunities to stand out from the crowd. Whether through volunteer leadership, as a thought leader by contributing content, gaining visibility by earning an award, or being involved in one of our specialty groups.

- **NAIFA Quality Awards:** Receive recognition for quality of client care in the following categories: Life Insurance, Multi-Line, Financial Advising, and Health & Employee Benefits
- **Advisor Today:** NAIFA's lifestyle brand with the tagline "Live + Work + Give" provides content through the AT Blog, print magazine, webinar series, podcast, and award programs to highlight the work of members
- **Young Advisor Team (YAT):** Consisting of members who are aged 40 or younger, this group is committed to bringing more young advisors into the industry and supporting their journey
- **Volunteer Opportunities:** From leadership roles at the national level to micro-volunteerism at the affiliate level, there are dozens of ways to be recognized for service to the association
- **Profile Listing:** Only NAIFA members are listed in the consumer-facing directory found on NAIFA's consumer site, financialsecurity.org
- **Writing & Speaking Opportunities**
Become a blog contributor and get published in front of 80,000 subscribers. Speak at meetings and more.

