



# NAIFA

## 2030 STRATEGIC PLAN

2025 Business Implementation Plan

STRENGTH

IMPACT

AWARENESS

# A Message from the CEO



The year 2024 stands as a defining chapter in the history of the National Association of Insurance and Financial Advisors (NAIFA) and the broader financial service industry. Early in the year, NAIFA joined with Life Happens – the industry’s leading voice for public awareness and consumer education about the importance of life insurance products, and merged with the Society of Financial Service Professionals (FSP) – the industry’s premier provider of quality education. Following historic membership votes and the approval of each organization’s leadership, NAIFA, Life Happens, and FSP became a unified entity as of January 1, 2024, empowering financial professionals and consumers through world-class advocacy and education.

NAIFA continues as the foremost advocacy association in the insurance and financial services industry. With members in every Congressional District, our influence in Washington, D.C., and every state capital is unmatched. Our prestige, tremendous grassroots network, and highly rated political action committee protect the ability of financial professionals to work in the best interests of the consumers they serve.

The addition of FSP brings NAIFA deeper into the realm of advanced planning and multidisciplinary collaboration by connecting with financial professionals such as attorneys, CPAs, and advanced planners. FSP’s renowned programs—such as the Journal of Financial Service Professionals, the FSP Institute, and its highly regarded webinar series—seamlessly complement NAIFA’s existing offerings, delivering an enhanced suite of benefits to members.

Simultaneously, Life Happens continues its mission as NAIFA’s consumer outreach arm, conducting national awareness campaigns like Life Insurance Awareness Month, Insure Your Love Month, and Disability Insurance Awareness Month to educate the public on the value of life insurance and other financial risk products in sound financial planning.

As we move into 2025, NAIFA builds on the momentum of these transformative changes. Our expanded capabilities in professional development and consumer outreach promise greater exposure and influence for the association and increased opportunities for our members to achieve professional success. Guided by the NAIFA 2030 Strategic Plan, we will continue developing a new roadmap to take us through the next five years, bringing together NAIFA’s brightest minds, industry leaders, and strategic advisors to set a clear path forward.

While 2024 marked an extraordinary year of innovation and integration, 2025 represents a pivotal moment of execution and progress. This 2025 business implementation plan serves as the blueprint for NAIFA to deliver on its mission, maximize value for members, and lead the industry with unwavering purpose and vision.

# NAIFA 2030 Strategic Plan: Summary

The NAIFA 2030 Strategic Plan charts the association's five-year trajectory post-merger with FSP and Life Happens in January 2024. The plan aims to solidify NAIFA's position as the leading organization for insurance and financial professionals by focusing on three pillars:

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## Strength

NAIFA will be the premiere organization for insurance and financial professionals which exhibits strength and leadership in member experience, powerful advocacy programs and innovative revenue streams that ensure membership growth and financial stability.

To achieve greater strength, NAIFA will deliver outcomes that grow the following areas over the next five years: Member Experience, Early-Career Professionals, Revenue Diversification, Advocacy.

## Impact

NAIFA's impact will grow as quality programs and innovative initiatives consistently deliver high-quality experiences to a broader range of financial professionals including CPAs, attorneys, and other interdisciplinary professionals. NAIFA will be the key developers of quality education and training by staying abreast of industry trends that position financial professionals with resources to succeed in their careers and adapt to changing market dynamics.

To achieve greater impact, NAIFA will deliver outcomes that directly improve the following over the next five years: Consistent Quality, Interdisciplinary Reach and Collaboration, Innovation.

## Awareness

NAIFA will be the preeminent voice of insurance and financial professionals as evidenced by an industry-wide awareness of NAIFA's clear value proposition effectively communicated and internalized by members, potential members, and stakeholders; widespread recognition of who NAIFA is and the value of our industry; and recognition of NAIFA as the industry's leading professional association in advocacy and education. NAIFA's brand identity of leadership, strength, success and innovation will resonate as an organization that has grown with the times, with FSP securing NAIFA's position as an industry leader in education and professional development, and Life Happens bolstering NAIFA's public outreach and promotion of the essential work, products and services members provide.

To increase awareness, NAIFA will achieve outcomes that directly improve the following over the next five years: Clear and Consistent Value Proposition, Consumer Awareness, Advocacy

# NAIFA 2025 Business Implementation Plan

The 2025 business implementation plan aims to effectively implement the NAIFA 2030 Strategic Plan by aligning NAIFA's most member-focused, high-impact activities, projects, and initiatives to advance the desired outcomes identified in NAIFA 2030.

Strategic pillars to drive implementation:

- **Prioritization & Alignment:** Identify and critically evaluate NAIFA initiatives that directly contribute to NAIFA 2030's desired outcomes and potentially "sunset" those that are no longer strategically relevant.
- **Data-Driven Decision Making:** Utilize performance metrics and ROI analysis to prioritize initiatives that deliver the most significant impact and value.
- **Resource Optimization:** Analyze resource allocation (staff, budget, time) across departments to identify underutilized or overextended resources.
- **Collaborative Implementation:** Foster collaboration by establishing cross-functional teams with clear leadership roles and transparent communication channels.

**The following four strategic initiatives have been identified to advance the 2025 desired outcomes from the NAIFA Strategic Plan. Each defines targets, specific NAIFA programs and products, and cross-functional leadership as foundational elements for execution.**

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## 1. Membership Growth Initiative

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The Membership Growth Initiative is a cornerstone of NAIFA's business implementation plan that combines strategies focusing on advocacy, industry workforce and multidisciplinary members with dedicated leadership to meet goals.

### Targets:

- Begin net membership growth in 2025, with goal to achieve 5% net membership growth in 2025
- Reduce membership attrition in 2025 versus 2024, with goal to reduce below 10%
- Complete three distinct recruitment and retention campaigns in 2025

### Key Initiatives:

**Advocacy as a Membership Driver:** NAIFA will capitalize on the public policy challenges and opportunities presented by the new Administration, Congress, state legislatures and interstate organizations in 2025. These evolving issues will be positioned as a cornerstone of NAIFA's value proposition to protect members' businesses and attract and engage members and prospective members seeking support, guidance, and representation during this period of regulatory and legislative change.

**Building the Future Financial Professional:** NAIFA will cultivate the next generation of talent within the financial service industry to ensure a sustainable and thriving pipeline of professionals who can carry the industry forward. By engaging students, young professionals and career-changers, NAIFA aims to inspire interest in financial service careers while positioning itself as a vital resource for professional development and success.

**Growing Multi-Disciplinary Membership:** NAIFA will diversify its membership base by reaching professionals across a broader range of financial service disciplines, including attorneys and accountants. Outreach efforts will target emerging sectors, career-changers, and niche markets while emphasizing NAIFA's resources, advocacy, and networking opportunities that benefit professionals in any financial services role.

**Membership Growth Task Force Leadership Team:** Membership (lead); Chapter Membership Chairs, Communications & Marketing, Partnerships & Life Happens, Advocacy, Finance, Professional Development.

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## 2. Revenue Diversification Initiative

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The Revenue Diversification Initiative will ensure financial sustainability and growth by broadening revenue sources.

### Targets:

- Achieve growth in LUTCF enrollments (250 domestically and 250 internationally)
- Generate \$1.5M in sponsorship and Centers of Excellence revenue
- Generate \$1.5M in revenue through the Life Happens partnership

### Key Initiatives:

**LUTCF Growth:** The LUTCF designation has long been recognized as a foundational credential for financial professionals, and this initiative aims to amplify its value proposition and accessibility to drive enrollment both domestically and internationally. Outreach efforts will focus on positioning LUTCF as the ideal designation for new professionals entering the financial service field. NAIFA will launch LUTCF in the southeast Asia market with efforts to emphasize the global relevance and adaptability of the program to meet that market's growing demand for financial education.

**NAIFA's Centers of Excellence:** The Centers are dynamic alliances that present opportunities for members to network with solutions and service providers to share best practices, access subject matter experts, research, training and resources; and provide thought leadership so NAIFA will continue to address the changing needs of the market. These Centers will also host live and virtual events, creating opportunities for networking and learning. Strategic marketing campaigns and partnerships with corporate sponsors and educational institutions will further amplify their reach, positioning NAIFA as the go-to source for career advancement in financial services.

**Life Happens:** Through Life Happens, NAIFA is leveraging the power of impactful storytelling and consumer-focused resources to engage members and attract new ones. By emphasizing this partnership's potential to drive members' business growth and their professional credibility, NAIFA aims to achieve significant revenue and membership gains while promoting its broader mission of financial literacy and client advocacy.

**Revenue Diversification Task Force Leadership Team:** Business Development (lead), Membership, Centers of Excellence, Communications & Marketing, Professional Development, Chapter Support, Finance, IT

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### 3. Professional Development & Engagement Initiative

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The Professional Development & Engagement Initiative is dedicated to elevating NAIFA's professional development and political engagement offerings by aligning content, delivery, and messaging with the diverse needs of its audience.

#### Targets:

- Increased participation rates: 25% increase among members; 100% increase among non-members
- Define audience personas to tailor content that aligns with members' needs and career stages
- Create key messages, themes, and promotional resources to unify communication across all platforms

#### Key Initiatives:

**Comprehensive Calendar & Strategy:** Develop a detailed plan for the timing, frequency, and delivery of professional development content to maximize impact and accessibility.

**Professional Pathways:** Design structured development pathways that guide members through their career progression, tailored to specific disciplines and stages of professional growth.

**Engagement Strategies:** Implement targeted campaigns and initiatives to boost member engagement with and utilization of professional development and political engagement resources.

**Professional Development & Engagement Task Force Leadership Team:** Professional development (lead), Communications & Marketing, Chapters and Affiliate liaisons, Project Management

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## 4. Key Events Framework Initiative

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The Key Events Framework Initiative represents a coordinated effort to deliver exceptional experiences at NAIFA's key events, including the Congressional Conference, FSP Institute, and National Leadership Conference. By leveraging cross-functional expertise, these teams ensure that each event is planned, marketed, and executed to achieve organizational objectives such as member engagement, sponsorship growth, leadership development and advocacy training.

### Targets:

- Increase participation rates
- Grow sponsorships
- Standardized promotion to create loyal attendance

### Key Events Framework Task Force Leadership Teams:

**Congressional Conference:** A flagship advocacy event emphasizing regulatory and legislative engagement.

Leadership team: Advocacy (lead), membership, communications, Business Development, Executive Office.

**FSP Institute:** FSP's flagship event on professional development and education.

Leadership team: Professional Development, Project Management, Communications & Marketing, Business Development, Membership.

**National Leadership Conference:** Event dedicated to NAIFA leaders for leadership training and strategic planning.

Leadership team: Chapter Services (lead), Advocacy (for training), Professional Development, Project Management, Communications & Marketing, Membership. Executive Office.

### Conclusion

The NAIFA 2030 Strategic Plan outlines an ambitious roadmap for the association's future. By strengthening its core, expanding our impact, and elevating our brand, NAIFA will solidify our position as the leading voice for insurance and financial professionals through 2030 and beyond.

