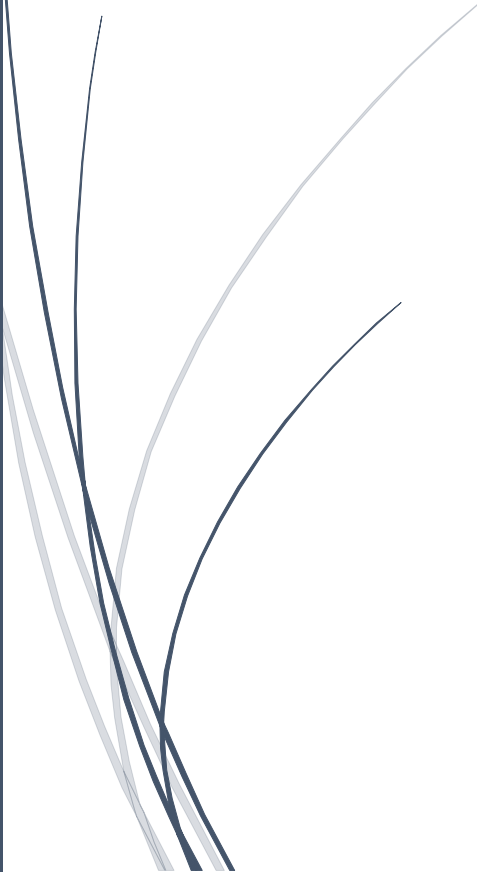


1/1/2025

# NAIFA-Texas Affiliate Resource Guide



## GENERAL INFORMATION

### Overview

NAIFA-Texas provides a vast array of services for local affiliates. This includes support for the marketing and implementation of events, and for the recruitment and retention of members. In addition, local affiliates can benefit from shared services and maximize their local exposure.

### Timeline

By October 1, have next year's leadership team on board and ready to go. Be ready to transition social media accounts. This can include Facebook, LinkedIn, Instagram, Twitter, etc.

### Affiliate Leadership Teams

Each local affiliate has a leadership team, not a board of directors. Rather than exist as a separate autonomous organization, local affiliates are part of NAIFA-Texas. The local leadership team should consist of an Affiliate Leader or Chair, Membership Coordinator, IFAPAC Coordinator, APIC Coordinator, and Programs Coordinator. Optional leadership roles for affiliates include Community Relations Coordinator, Social Coordinator, Membership Engagement Coordinator, Volunteer Coordinator, Sponsorship Coordinator, and Diversity Coordinator.

### Point of Contact

There is one main point of contact between NAIFA-Texas and each affiliate. This is the Affiliate Leader or Chair. If an affiliate has earmarked funds, the affiliate can utilize those funds for professional development activities such as local events, sending an individual to LIL, providing stipends for members to attend the Congressional Conference, P+P Conference, etc.

## Earmarked Funds

An affiliate that has earmarked funds can recruit sponsors and charge for events. Those with earmarked funds may add to those balances if their event has surplus revenue. Only the Affiliate Leader or Chair may request to use funds by sending an email to the Executive Director. This request must be made in writing.

## Number of Events

NAIFA-Texas will host virtual events and help market in-person events for each affiliate throughout the year. These events must be coordinated with NAIFA-Texas' event staff.

## Notice of Events

NAIFA-Texas asks that events for the following year be submitted to NAIFA-Texas staff by October 1. Affiliates must provide a general plan of what they expect to spend on events during the next year to be included in the state budget. Affiliates with earmarked funds will have overages taken from their accounts and affiliates without earmarked funds will be held to their budgets and must demonstrate revenue for any non-virtual event. NAIFA-Texas markets events one to two months in advance of when they will occur and maintains a [State Event Calendar](#) for industry professionals.

## Marketing of Affiliate Events

NAIFA-Texas event staff will work directly with the affiliate leadership team to determine the best communication plan for each event based on the event's goals. Below is the typical marketing plan for affiliate events, but marketing is impacted by the overall planning of the local affiliate and how early information is shared with NAIFA-Texas:

- Once NAIFA-Texas has the schedule of the affiliate's events, it will be added to the state calendar and posted online. This is immediately available to all visitors to the NAIFA-Texas website.

- The event will be promoted statewide approximately one month prior to the event on the NAIFA-Texas website blog that is sent to all current NAIFA-Texas members.
- Approximately three target audience-segmented emails will be sent to the applicable local area advertising the event.
- One or more social media posts may be used to advertise the event.

## SOCIAL MEDIA

NAIFA-Texas affiliates are strongly encouraged to utilize NAIFA-Texas social media platforms for event promotion as opposed to having their own social media profiles. This helps leverage the visibility that NAIFA-Texas has across the state and ensures consistency in messaging. Please ensure the necessary event information (event name, date, time, description, and, if applicable, speaker's information) is provided to NAIFA-Texas event staff with at least two weeks' notice.

The current social media platforms NAIFA-Texas uses are [Facebook](#), [Twitter](#), [Instagram](#), and [LinkedIn](#). When posting to social media, please use the hashtags #naifatxproud and #naifaproud.

## ACCOUNTING AND BUDGETS

If an affiliate has earmarked funds, NAIFA-Texas can disburse those funds at the affiliate's request. If an affiliate does not have earmarked funds, then the affiliate's events must be budgeted within NAIFA-Texas' budget and NAIFA-Texas will be responsible for the expenses and revenue. The affiliate will be working with NAIFA-Texas staff to put the event in place. The assigned person will assist the affiliate in developing an events budget that includes all anticipated expenses and revenue.

## Accounting Guidelines

All documents obligating funds for NAIFA-Texas must be signed by NAIFA-Texas staff, not volunteers. An affiliate's event must have revenue equal or greater to the expense unless earmarked funds are being used to cover the event.

All bills, invoices, checks, and other accounting activities must be sent directly by the Affiliate Leader or Chair to the NAIFA-Texas office within 30 days of the event. Travel reimbursements must abide by the travel reimbursement policy with the proper reimbursement form used. Working with NAIFA-Texas event staff will facilitate a timely and efficient accounting process for the affiliate and for all vendors involved. All reimbursement requests must be submitted within 30 days of the event to be eligible for reimbursement.

If a member of an affiliate team enters into a written or verbal agreement with a vendor, the agreement will be invalid, and payment will not be made.

## MEMBERSHIP

### Membership Team

Affiliates are asked to have a membership team consisting of three people - one for recruitment, one for onboarding, and one for retention.

### Onboarding

This volunteer is responsible for reaching out to members once they join to welcome them and let them know what to expect from membership.

### Recruitment

This volunteer should be aware of leaders in his/her communities, including agency managers and key contacts. He/she is asked to schedule agency presentations in the local area. An agency presentation template is available on NAIFA's website.

## Retention

This volunteer is responsible for retaining current members and keeping them from dropping their membership. This person should call members who are approaching the end of their membership term to encourage them to renew and/or find out why they are not renewing. From there, the member should be plugged into local affiliate events to help keep them actively engaged.

## Process for Joining

All members join NAIFA directly through NAIFA National. No membership dues are collected at the state or local levels. Local leaders should not collect credit card information from individuals looking to join. Instead, please direct potential members to the “Join” link on [NAIFA’s homepage](#).

## Membership Lists

Any members of the affiliate leadership team (leadership team chair, membership recruitment chair, membership retention chair, membership onboarding chair, etc.) may request a membership list of NAIFA-Texas members who reside within the area represented by the affiliate. The membership list can be sorted by zip codes or by cities.

## IFAPAC/PAC

### NAIFA National IFAPAC Contribution Requests

If you have a check request for a member of Congress or U.S. Senate, please email Stephanie Sheridan, NAIFA’s IFAPAC Manager, at [ssheridan@naifa.org](mailto:ssheridan@naifa.org). Please provide the name of the legislator, the fundraising event flyer for which the funds will be allocated, and a brief description of your relationship with the legislator. You can also email Stephanie to inquire as to how much money has been allocated to a specific legislator at the federal level.

Please note that NAIFA will no longer mail IFAPAC checks directly to NAIFA members for in-person check deliveries. According to the NAIFA IFAPAC team, federal legislators have specifically requested for funds to be sent directly to their campaign/fundraisers to prevent checks from getting lost and needing to be reissued. NAIFA includes a cover letter with the IFAPAC check to the campaign stating which NAIFA member requested the funds.

### NAIFA-Texas PAC Check Request

To request a NAIFA-Texas PAC contribution for a state legislator (Texas House or Texas Senate), please submit a [NAIFA-Texas PAC Contribution Check Request](#). PAC contributions cannot be made while the Texas Legislature is in session which is typically January through May in odd-numbered years.

After the form is submitted, this request will be presented to the NAIFA-Texas PAC Board of Directors for a discussion and vote. Please note that the NAIFA-Texas PAC Board of Directors typically meets every 4-6 weeks. Once the request is approved, you will receive an email from NAIFA-Texas staff to confirm the mailing address to send the check to, as well as the date it should be mailed.

**Please remember that when delivering a check in person, do not take a picture with the legislator and have the physical check in the photo. This is a violation of Federal Election Commission regulations. However, feel free to take photos with the legislator without the check, so you can be featured on NAIFA-Texas' social media channels.**

## GOVERNMENT RELATIONS

### Government Relations Contacts

NAIFA-Texas Government Relations Committee Co-Chairs:

Jason Talley: [jason@talleybenefits.com](mailto:jason@talleybenefits.com)

Ian Escalante: [ianescalante@gmail.com](mailto:ianescalante@gmail.com)

For any legislative issues to present to the Government Relations Committee, please email Jason, Ian, or NAIFA-Texas staff. The committee will ask for a full explanation of the issue, who it affects, and what the proposed legislation should be.

### Communication with NAIFA-Texas Lobbyists

Any communication with the NAIFA-Texas lobbyists, must be facilitated through NAIFA-Texas staff. We want to be respectful of the lobbyist's time and have an organized and streamlined flow of communication.

## RESOURCES

### NAIFA-Texas Management Team

Renaë Davies – Executive Director  
3755 Attucks Drive  
Powell, OH 43065  
(512) 716-8800  
[exec@naifa-texas.org](mailto:exec@naifa-texas.org)

Rebekah Hazlett – Programs/Membership Director  
3755 Attucks Drive  
Powell, OH 43065  
(512) 716-8800  
[support@naifa-texas.org](mailto:support@naifa-texas.org)

### NAIFA National Staff

- Corey Mathews – Vice President of Member & Chapter Services  
Email: [cmathews@naifa.org](mailto:cmathews@naifa.org)  
Phone: (703) 770-8404



- Justi Folladori – Director of Chapter Services  
Email: [jfolladori@naifa.org](mailto:jfolladori@naifa.org)  
Phone: (703) 770-8410

### NAIFA Chapter Playbook

This online resource has information about operating a chapter, as well as advocacy, membership, programs, and marketing information.

### NAIFA New Member Emails

NAIFA sends emails with the names of new members to the NAIFA-Texas Office Staff, NAIFA-Texas President, and NAIFA-Texas Membership Chair. A week after an individual joins NAIFA, a NAIFA staff member calls them to welcome them. Immediately after a new member joins in Texas, a welcome email is sent to them by NAIFA-Texas staff with links to resources and events. NAIFA-Texas also sends the names of non-members who attend state events to local affiliates.

### NAIFA Monthly Leadership Calls

All volunteers are encouraged to participate. These calls are held on the first Thursday of each month via Zoom from 3 p.m. – 4 p.m. CT. Please contact [Justi Folladori](#) to sign up for the calls.

### NAIFA Monthly Membership Chairs Calls

All membership volunteers are encouraged to participate. Please contact [Justi Folladori](#) to sign up for the calls.

## Additional Links

Recruiting: <https://belong.naifa.org/fees>

Advisor Ambassador Program: <https://belong.naifa.org/ambassador>

Renewals: <https://community.naifa.org/login.aspx>

Marketing Membership: <https://community.naifa.org/page/MarketingMembership>

New member Orientation: <https://members.naifa.org/orientation>

Leaders Center: <https://leaders.naifa.org>

## KEY NAIFA BENEFITS

[Advisor Ambassador Program](#)—NAIFA’s new online advisor development program. For just 30 minutes a week, NAIFA members can participate in live strategic discussions, industry insights, and more.

[NAIFA Live](#)—NAIFA’s monthly workshop that are held virtually. There is no cost for NAIFA members to participate.

[Limited & Extended Care Planning Center](#)—The LECPC was created to equip insurance and financial professionals with information, training, education, and resources to meet the needs of clients in this important area. The Center features a virtual, private online community. Insurance professionals can come together to network with solution and service providers to share best practices; access and disseminate information, research, training, and resources; and provide thought leadership to ensure limited and extended care planning products and services continue to address the changing needs of the market.

**LACP/LUTCF**—Membership in NAIFA entitles professionals to a discount when obtaining the [LACP](#) (Life and Annuity Certified Professional) and [LUTCF](#) (Life Underwriter Training Council Fellow) designations.

For a complete list of benefits, please visit <https://belong.naifa.org/>.