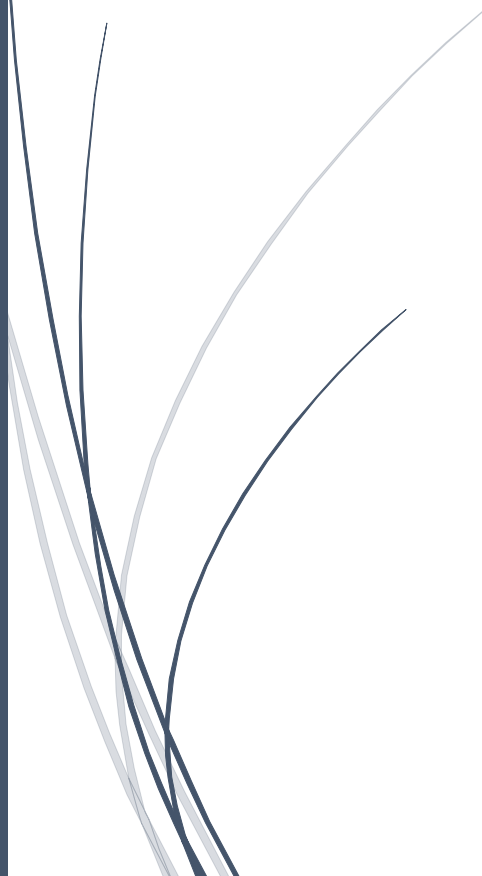


1/1/2025

# NAIFA-Texas Chapter Resource Guide



## GENERAL INFORMATION

### Overview

NAIFA-Texas provides an array of services for local chapters. This includes support for the marketing of events and for the recruitment and retention of members. In addition, local chapters can benefit from shared services and NAIFA-Texas can help them maximize their exposure.

### Chapter Structure

Each local chapter in Texas is a separately incorporated 501(c)(6) non-profit corporation with its own bylaws, policies, and board of directors. All members of local chapters are also members of NAIFA-Texas. Currently, approximately 900 of NAIFA-Texas' 1,250 members are part of a local chapter. Local chapter members rely on NAIFA-Texas to provide statewide educational events, discounts on continuing education, and advocate for them at the state level in Austin. Local chapter members look to the local chapter to provide them with networking and educational events tailored to their local area.

To ensure an optimal experience for members throughout Texas and to help NAIFA-Texas remain a vibrant and thriving organization, there is an expectation that chapters will actively recruit new members and work closely with NAIFA-Texas staff to coordinate the timing of events.

### Point of Contact

There are several main points of contact between NAIFA-Texas and each local chapter. These include the NAIFA-Texas Administrative Office, NAIFA-Texas Board Liaisons, Local Chapter President, and Local Chapter Executive.

### Notice of Events

NAIFA-Texas asks that events for the following year be submitted to NAIFA-Texas staff by October 1. This enables NAIFA-Texas to place the events on its

[State Event Calendar](#) and advertise the event within the monthly membership newsletter.

## MEMBERSHIP

### Membership Team

Local chapters 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

Local chapter volunteers have access to their chapter’s membership list in the [leadership section](#) of NAIFA’s website. The membership lists contain a great deal of information and can be sorted by last name, company, city, zip code, etc.

## 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 Senior Political Director, 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](#).

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 the NAIFA-Texas Administrative Office. 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 Lobbyist

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

## RESOURCES

### NAIFA-Texas Administrative Office

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 typically 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.

### NAIFA-Texas Monthly Membership Calls

All membership volunteers are encouraged to participate. Please contact [NAIFA-Texas staff](#) to sign up for the calls, if scheduled.

### 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 virtual monthly workshop. 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/>.