



## Candidate Information

Below is a guided CV to apply for consideration as a trustee and secretary candidate. Please take some time to enter your relevant work, volunteer, and industry information in the space provided below. When complete, please upload this document along with your photo submission to [candidate@naifa.org](mailto:candidate@naifa.org)

The Governance Committee no longer accepts letters of recommendation and asks that the candidates keep their application for Trustee or Secretary confidential during the entire selection process. Please do not publicize.

### Full Name

### Business Experience

*Provide a chronological resume of organizations worked for, positions held, and dates starting with most recent position first.*

### Practice Specialties

*Please list the areas your practice covers.*

### Education and Training

*Include college and university degrees as well as designations and licenses held.*

**NAIFA Association Committee and Leadership Experience (national, state, local)**

*Please list most recent committee or leadership experience first with your approx. dates of service.*

**NAIFA Annual Conferences Attended**

**Political Involvement**

*Please include your participation in NAIFA Congressional Conferences, state Days on the Hill, in-district meetings, and the legislators for whom you serve as a key contact (if applicable)*

**NAIFA Membership Activities**

*Please highlight your membership engagement activity. Information could include number of members you've recruited or sponsored, agency presentations, or your role in building state or local membership teams.*

**Other NAIFA Activities**

*They could include LLI graduate or moderator, LUTCF or Advisor 2020 moderator, YAT mentor, NAIFA Quality Award recipient, NAIFA Online Leadership Academy graduate, etc.*

**Industry Involvement**

*Please list other industry organizations to which you belong, years of membership and leadership positions held.*

**Company Involvement**

*Please note participation and/or leadership positions held in company/producer group committees/organizations as well as honors received.*

**Community Involvement**

*Please note participation and/or leadership positions held in civic, community, and charitable organizations.*

**Communication Experience and Training**

*Please list examples of your communication experience and/or training such as articles authored, presentations delivered, or training completed. Please be sure to note publication titles, event names, and dates.*

**Statement of Qualifications and Vision**

*Please provide a separate written statement stating your qualifications for the position you are seeking and your vision for NAIFA. Please limit your written statement to 500 words.*

**Personal Information**

*Tell us something about you. Do you have hobbies or interests outside the insurance and financial services industry?*

## **Confidentiality and References**

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