

**Watch Party Kit**

**Purpose**

The leaders of a NAIFA Live Watch Party, no matter where they are setting up, should be able to take the following and use it as a script/roadmap to conduct their NAIFA meeting and use the NAIFA Live broadcast as dynamic content.

**Before**

1. Secure the location of the watch party.
2. Register for [NAIFA Live](https://live.naifa.org/) (host only).
3. Decide if breakfast, lunch, etc. will be served. (Order food, drinks, etc. if necessary.)
4. Determine if you will host an event before or after – though not necessary. (Continuing Education, Networking, Happy Hour, etc.)
5. Set attendance goal and track RSVPs. (Don’t be discouraged if you come up short your first time!)
6. Begin marketing the event at least three weeks prior (or as soon as you have confirmed you will host the watch party).
7. Ensure your location has the appropriate equipment.
   1. TV or Projector and Screen
   2. Internet Connection
   3. Cords/Cables (Extension Cord, HDMI, etc.)
   4. Laptop
8. Take photos and send to [marketing@naifa.org](mailto:marketing@naifa.org).
9. Create a pre and post speaker agenda.
10. Send reminder email to RSVP’d guests.
11. Test your technology upon arrival.
12. Have fun!

**During (Pre-Viewing)**

1. Timeline for the meeting.
2. Suggested script for before and after NAIFA Live broadcast.
3. Recommended cornerstone activities during meeting.
   * Pledge of Allegiance
   * Advocacy Update
   * Provide Update on Local Activities
     + Community Related
     + Industry Events
     + State Events
   * IFAPAC Fundraiser
   * Introduction of Guests and Sponsors
   * 30 Second Member Introduction

**During (Post Viewing)**

1. [Membership Promise Presentation](https://leaders.naifa.org/presentation) (Facilitated by Chapter Leader)
   * Ask nonmembers to join.
   * Pinning ceremony (pin recently joined or new members).
2. Case Studies or Leader-Led Thought-Provoking Discussion (Provided by Speaker)
   * Have moderator at every table.
   * Choose one leader to report out key points.
3. Closing
   * Thank you for attending.
   * Please bring nonmembers to the next meeting (always make the ask).
   * List the next NAIFA Live meeting.
   * Ask attendees for feedback.

**NAIFA Live – Sample Agenda and Script**

15 Minutes Set-Up for Leaders

15 Minutes Registration for Meeting

15 Minutes Opening Remarks from Chapter Leader

**Welcome**

“*Welcome to your [Insert Month] NAIFA Meeting. Thank you for joining me. Let’s start with our Pledge of Allegiance. Please rise.”*

*“You may be seated. Thank you everyone for coming today. We are going to start with our guests. If you’re a guest today, please stand and we will walk the microphone around. Please give us your name, your company, who is responsible for bringing you to your NAIFA meeting today and tell us briefly about your business.”*

**Walk the microphone around and make sure everyone can hear the guests.**

*“Let’s do the same for our sponsors. If there are any**sponsors in the room, please stand and be recognized.”*

**Walk the microphone around and make sure everyone can hear the sponsors.**

*“Let’s give our sponsors a round of applause. [CLAP] It is because of our sponsors that we get to have fantastic programming like this. Please get to know them and use them as a resource as much as possible.”*

*“Next, we are going to quickly pass the microphone around and each person is going to get 30 seconds to tell the group who you are, what you are looking to take away from this meeting, what’s your business and either something unique about you in business or what is the ideal client that you’re looking for.”*

**Walk microphone around and MAKE SURE people stay within their 30 seconds.**

**15 Minutes Prior**

**Advocacy Update**

*“Next, I’d like to invite [Insert Chapter Leader] up to give us an Advocacy update.”*

***[Insert Chapter Leader]*** *– “I’ve got a couple impactful action items that NAIFA has been working on to strengthen our profession… (List bill(s) followed, actions taken in State, campaigns donated to, etc.)”*

**Start NAIFA Advocacy/Congressional Conference/IFAPAC Video (If available – no more than two minutes.)**

***[Insert Chapter Leader]*** *– “That is exactly why we are members of the country’s largest association that advocates for the Financial Advisor, without respect for carrier affiliation. If you have additional questions or interest in becoming involved, please see one of our Chapter Leaders for more discussion.”*

*“I want to make sure everyone understands what is about to transpire. We have five minutes until the scheduled NAIFA Live broadcast begins. At that time, the NAIFA Live broadcast will begin, where our host will introduce our monthly speaker. The speaker is slated to go until [Insert Time] (one hour after your local start time). After that, we will continue here with a couple more important discussions, and we will be done by [Insert Time] (half hour after speaker ends).”*

*“While we wait for the speaker to begin, please introduce yourself to your neighbor and make friends!”*

**1-Hour**

**NAIFA Live Broadcast and Speaker**

**15 Minutes After**

**Leader-Led Discussion About NAIFA Live Topic**

Moderator Best Practices:

* Comment on what people have said.
* Rather than hearing one person’s answer and turning to the next person, you can respond to an answer with something like, “That’s a surprise.”
* Ask other attendees for feedback on what others have said.
* Ask leading question (How and Why).
* Don’t be afraid to cut someone off if they are rambling.
* Look for body language to see if anyone else would care to weigh in.
* Have more questions than you need.

Sample Questions:

* What was a key take-away from that presentation?
* Was there something someone disagreed with?
* How can you apply those lessons to your clients?
* How might that discussion be used in your personal life?

**15 minutes**

**Membership Promise Presentation**

**5 Minutes   
Closing Remarks**

*“Thank you for attending! We appreciate you being a NAIFA member. Don’t forget to bring a non-NAIFA member to our next meeting and show them how impactful NAIFA is! Our next meeting is [Insert Meeting Date].”*