**Member Engagement Commitment**

NAIFA-[Insert Chapter] exists to provide value to its members by advocating for a positive legislative and regulatory environment, enhance your business and professional skills, and promote the ethical conduct of all financial services professionals.

When you invest your dues in us, we commit to be excellent stewards of these resources to achieve the mission above; however, to truly realize our vision, we need your assistance. We need your time and talent as well. The good news is that we are not asking for more than you can give. It can be as simple as being an “engaged member,” but if you have time and interest that would lead you to a larger calling in the Chapter, we need and want your participation.

**Please take a few minutes to select all of the options below that apply, or are of interest to you,** and remember that we are only asking you to commit to being an “Engaged Member.” By checking any of the other options, you are only indicating that you are considering and interested in learning more.

❑ **Engaged Member** – As an engaged member, I hereby commit to:

1. Participate in a NAIFA Member Orientation Session (if I haven’t previously);
2. Like/Follow NAIFA and NAIFA-[Insert Chapter]’s LinkedIn, Facebook, Twitter, and Instagram, if I utilize any of these social media platforms;
3. Review communications from NAIFA as they are received;
4. Notify us of any relationships you have with state or federal lawmakers; and
5. Attend NAIFA events, whenever possible and if they are applicable.

**Programs (Meetings & Events)**

❑ Introduce a speaker (15 minutes)

❑ Welcome attendees/assist with registration at an event (1 hour)

❑ Write a blog article about an event (1-2 hours)

❑ Take pictures at an event (2-4 hours)

❑ Help organize and/or host an event (4-10 hours)

**Marketing & Communications**

❑ Like & share NAIFA posts on social media (15 minutes)

❑ Proofread key communications (15 minutes)

❑ Develop content for social media (30 minutes)

❑ Write blog articles for membership (1-2 hours)

**Advocacy**

❑ Familiarize yourself with the NAIFA Advocacy in Action center, as well as send a legislative alert and/or thank you letter (45 minutes)

❑ Write, call, and/or visit a policymaker in-district to build a relationship (1 hour)

❑ Participate in an IFAPAC phone-a-thon (1 hour)

❑ Testify before a regulatory or legislative body (2 hours)

❑ Consider committing to a monthly contribution to IFAPAC

**Membership**

❑ Identify prospective members in your area (1 hour)

❑ Contact an agency manager to schedule a presentation (1 hour)

❑ Welcome calls to new members (1 hour/month)

❑ Follow up calls to lapsed members (1 hour/month)

❑ Represent the profession at a student event (2 hours)

❑ **Committee Member** – Serving on a NAIFA-[Insert Chapter] committee is a great way to get started in a leadership role in the Chapter. There is little to do in way of preparation or homework in this role, we just ask that you set aside about an hour to an hour and a half a month to participate and share your expertise in the areas of membership, advocacy, programs, Young Advisor Team, Diversity Advisor Team, and other areas of importance to our members.

❑ **Committee Chair** – Serving as a NAIFA-[Insert Chapter] Committee Chair is an important role in advancing the critical goals and objectives of the Chapter. However, it is probably not as big a job as you think! The chair serves to lead the committee meetings and discussion, and does require a bit of extra time meeting with the Chapter Executive for coordination, but you are likely only to need to set aside two to two and a half hours a month to be the lead volunteer on critical subjects; including membership, advocacy, programs, Young Advisor Team, Diversity Advisor Team, and other areas of importance to our members.

❑ **Affiliate Chair** – One of the greatest values we have to offer as an association is the expertise and experience of one another. An Affiliate Chair serves to bring together members within regions of the state to network and engage in fun and/or educational opportunities. The goal is for Affiliates to gather at least once a quarter to engage members according to their preferences, as well as to assist in Chapter communications within the region. We expect this role to take two to four hours a month; however, this number could be less or more depending on how often you determine to hold programs and whether you choose to recruit additional volunteer support within your region.

❑ **Board Member** – The NAIFA-[Insert Chapter] Board of Directors is responsible for the governance and oversight of the Chapter. They set the strategic vision of the Chapter, direct staff, and monitor operations to ensure that the members are effectively being served. Board members tend to serve three to six hours a month; until or unless they decide to become an officer, at which time it is four to eight hours a month, or six to ten hours if you are President. However, being a Board member does not mean that you have to eventually be an officer, that remains a separate decision. Being a Board member means you are at the table when important decisions affecting your Chapter are made.

By executing this form, I commit myself to being an engaged NAIFA member and will help to strengthen and improve our Chapter and association to the best of my ability with the time I have available.

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_