



## ABOUT THE Financial Security Champion Program

The Financial Security Champion Program was developed to acknowledge organizations for their commitment to NAIFA by allowing a set of individuals within the organization to participate in NAIFA as a group. Groups that participate in the program receive special recognition for their involvement, special benefits, and provide expanded advocacy support for the individuals within the group at both federal and state levels.



Dan Peterson, LUTCF,  
LLIF, FIC  
Fargo, North Dakota  
Loyal Member Since 1992

### Create a culture of excellence.

*We chose to invest in NAIFA for our producers because we believe in putting our clients' best interests first which is what the NAIFA Code of Ethics states. Our producers that are members of NAIFA are committed to their clients, community, and the industry and get involved in grassroots advocacy to be the voice of their clients to legislators. We are extremely proud to support our advisors in belonging to their professional association."*

### Quick Facts:

- Decide a membership package that works for you and can include a combination of member types to best suit your needs
- All members receive all the benefits and rights of full membership in NAIFA including IFAPAC contribution & grassroots advocacy

### The Value to You:

- Organization gains recognition through promotion on the consumer site, *Advisor Today* digital platform, and more
- Advisors are rewarded for participation through publicity and the organization receives extra recognition & preferred rates

# Program Benefits

NAIFA's Financial Security Champions program is designed to be a win-win for organizations and their teams. Offering all of the traditional benefits of NAIFA membership with the exclusive recognition of being a Financial Security Champion in your market through aligning your firm with the oldest and most revered association in the industry.

## Flexible Group Plans

Decide who should be part of the Financial Security Champion package and how to pay for membership.

## Onboarding & Advocacy

### Training Sessions

Explore all that NAIFA has to offer with a special onboarding session and special advocacy training session exclusively for your team.

## Organization Profiled in *Advisor Today* blog

Let your talent shine on a national stage as we feature your organization in our blog with a distribution of more than 80,000. Once a year, your logo will be recognized in NAIFA's magazine.

## Special Logo & Welcome Kit

Show your clients that your organization invests in their financial services professionals & adheres to the highest level of care.

## Logo Placement

Get recognized with your organization's logo on NAIFA's consumer site ([financialsecurity.org](http://financialsecurity.org)) and within the NAIFA Members' portal.

## Organization Offers

Receive discounts to professional development events, NAIFA Quality Awards, the LUTCF designation and the LACP certification, along with the opportunity to submit your professionals for awards and engage in leadership activities.

## Agency Insurance Offers

Receive access to CalSurance Agency/Firm E&O insurance and other group insurance plans to cover your team.

## National, State & Local Membership

Your membership for your financial services professionals includes access to events at all three levels of NAIFA.

## Preferred Subject Matter Experts

Your organization will be in a preferred pool of contacts for commentary, participation, writing and speaking opportunities offered by NAIFA, and will be the first group tapped when media calls looking for subject matter experts.

## HOW THE PROGRAM WORKS

1. Design a package to meet your organization's goals and choose the structure of your membership package
2. Sign membership agreement outlining service and membership terms
3. Reconcile any current members to enter into group membership plan
4. Organization onboarding includes kick-off call, press release, & special welcome kit that includes Financial Security Champion logo swag so that you can proudly display in your office.
5. Quarterly care calls and newsletters to ensure that you understand what is new at NAIFA and what opportunities you can take advantage of to better market your firm/agency.

### Learn More

Contact Randy Clark, Senior Director of Membership Outreach & Engagement at [rclark@naifa.org](mailto:rclark@naifa.org) or call 410.610.9695 (mobile) 703-770-8222 (office)

Or, drop an email to [recruitment@naifa.org](mailto:recruitment@naifa.org).