



## Quick Facts – Beginning your meeting

- The nation’s oldest and largest insurance and financial services association with members in every Congressional District.
- 90 percent of NAIFA members service middle-income families; 69 percent of clients’ household income falls below \$150,000.
- 42% of American adults say they need life insurance, or more of it, representing a life insurance need-gap for about 102 million adults.
- 54 million women say they need life insurance, or more of it. Women (46%) are less likely to have life insurance than men (57%). This 11-point gender gap is the largest reported in 14 years.

Share how your service and products help families and business achieve financial security. Or share the [Power 5 in under 15 minutes](#) for videos providing real world examples.

## We are asking lawmakers to:

- Support H.R. 8915, H.R. 1477, S.722 to expand 529 plan withdrawals to include postsecondary training and credentialing, such as licenses and professional certifications.
- Join us in celebrating September as Life Insurance Awareness Month.
- Utilize NAIFA members as a resource next year during anticipated tax and retirement reform efforts.

## Questions for lawmakers:

- How do you see financial challenges affecting the constituency in your district?
- Do you plan on supporting the “Freedom to invest in Tomorrow’s Workforce Act” or the “Education and Workforce Freedom Act?”
  - This act would significantly expand approved uses for 529 plan withdrawals to provide financial professionals and their clients with greater financial flexibility as they enter the workforce and seek to further their education.
- Would you be willing to issue a statement in support of Life Insurance Awareness month?
- How can we serve as a resource for you and your staff in the upcoming 2025 calendar year?