



# 2021 Key Accomplishments

## Federal Advocacy

- Virtual Congressional Congress in May had over 1,100 participants and 100 virtual meetings with legislators
- Held over 40 in-person meetings on Capitol Hill in December
- Developed & delivered NAIFA legislative priority packets to all 535 Members of Congress and 4,500 state legislators
- Obtained Correction from IRS on Stretch IRAs

## State Advocacy

- Led NAIC annuity best interest state initiative with ACLI resulting in the adoption by 19 states
- Provided testimony before a dozen state legislatures on Main Street issues
- Supported the creation of the Long-Term Care Legislative Working Group to aid states in advocating for positive policies
- Launched Get Out the Vote campaign initiative

## Membership Engagement

- Recruited more than 4,500 new members since NAIFA restructure
- Membership retention levels at historic high due to new value
- Launched tools and resources to improve quality member experience across all 50 states
- Increased volunteer recognition through company support & media outlets
- Held inaugural National Leadership Conference to celebrate the new NAIFA's success with a sold-out event in Washington, D.C.

## Education

- Grew Centers of Excellence to 5: Talent Development Center, Business Performance Center, Advanced Practice Center, Advocacy Action Center, Limited & Extended Care Planning Center & Employee Benefits Center
- Held successful virtual Performance+Purpose educational conference
- Held monthly members-only NAIFA Live educational series featuring sales ideas to an average of 300 attendees per event
- Returned *Advisor Today* magazine to print & digital form

## Diversity, Equity, & Inclusion

- Signed the CEO Action for Diversity & Inclusion Coalition
- Signed the Diversity in Government Relations Pledge
- Signed the Coalition for Equity in Wholesaling & participated in workgroups
- Participant in the Coalition for Equity in Wholesaling working groups
- Developed and released DEI resources including white papers and webinars
- For 7th year in a row, held DEI Impact Week with over 500 participants
- Established a DEI chair position within 80+ chapters

## Consumer Financial Security

- Increased lifecycle stage content on FinancialSecurity.org to offer relevant content to more consumers
- Creation & participation in the Financial Security Alliance
- Released a new "Find an Advisor" search listing all NAIFA members that also powers Life Happens & Alliance for Lifetime Income advisor searches
- Participation in America Saves Week, Help Protect Our Families, Life Insurance Awareness Month, Disability Insurance Month, and FEMA initiatives

Join our Q1 2022 State of NAIFA webinar on January 26th at 12 pm eastern to learn more.

Register: [belong.naifa.org/q1-2022](https://belong.naifa.org/q1-2022)