

## NAIFA State Membership Chair Responsibilities

### 1. Build a Membership Team

Build a team based on the size of your chapter, including a BAT, DAT, and YAT. Team size is based on the number of members within your state. Suggest one capable and committed team member to every 100 members. No “volun-tolds.” All team members should learn the Membership AED Elevator Speech.

### 2. Attend NAIFA Nation Monthly Membership Chair Meetings

Attend your regional meeting. Invite all members of your team to attend. Should you be unable to attend your region’s meeting, join in on another. There are three regions – East, Central, and West. Each region will have two Vice-Chairs who are proven leaders in growing membership. Use them.

### 3. Identify & Solidify Agency Advocates or Ambassadors

Recruit a micro-volunteer in each regional office of a carrier, IMO, BGA, etc. Ask them to meet with non-members. Use sell sheet AED elevator speech. Get in there. Carve out a membership-development budget for bringing bagels, buying coffee, and holding networking events. You are on an industry goodwill mission on behalf of the agents/advisors in the profession to bring NAIFA’s message to them so that they are aware of the opportunities within NAIFA. Leave no advisor unprotected or neglected!

### 4. Keep an Eye Out for NAIFA 100% Agency Program & Financial Security Guardian Candidates

Ideally, a qualified agency is one that can add ten or more new members. Smaller numbers work, too. NAIFA’s closure rate increases when the lead is sent in as a referral (aka warm lead). This program can have a huge impact on your chapter’s numbers and provide positive YE growth. Submit your leads to [recruitment@naifa.org](mailto:recruitment@naifa.org). Contact Dennis Cuccinelli if you need help in identifying candidates.

### 5. Agency Presentations

This is an effective method to obtain new members and amplify the NAIFA Brand. The Membership Chair should feel comfortable making the presentation. Based on the geographic size of the state, position others in areas to deliver the presentation. NAIFA Membership Vice-Chairs, Trustees, and staff stand ready to assist you. For every 100 members in a state/local chapter, there should be one agency presentation per quarter. State chapters should coordinate with local chapters.

### 6. Make the Care Calls for Retention Needs

Depending on the size of a chapter, one volunteer or field executive should be assigned to retention. They should contact lapses and engage them to return. Ignore those who retired and left the business. Should someone inform you they have retired, or you learn a member has died or left the business, notify NAIFA via an email to [info@naifa.org](mailto:info@naifa.org). We want to honor all our members who have passed. Need assistance downloading a current, recently expired, or lapsed list? Contact your Chapter Executive or Chapter Services Team.

### 7. Begin with the End in Mind

As soon as you hear an event is being planned, you, the Membership Chair, should ask the question: Is this for Membership Retention and are we are going to make an IFAPAC ask? Or, is it for Membership Acquisition and we’re trying to attract non-members to the event? You are the critical voice to help steer the event. Ask critical questions, such as “Why are we charging for non-members to attend? Why would they come?” Look for new sponsors that could underwrite an event that you can offer without the barrier of a ticket price. Scrutinize your programs—do you have a healthy balance that includes education as well as networking. Ask yourself, if I was in X population, would I want to attend? Is the program all insurance, and nothing appealing to investment? You, as the Membership Chair, are constantly trying to balance acquisition and retention. You are the head of marketing of the Chapter—you need to always ask, what are the optics and what do people think of our chapter brand? To whom do we appeal? Is this what we want? If not, change! You can always contact home office marketing for brand help.

### 8. Make Your Legislative Day the Best

The key differentiator of the state membership chair from the local membership chair is the state legislative day. It is critical that we get as many people as possible to the state legislative day and that the attendees truly represent the Main Street USA of consumers in your area. Make sure to invite advocacy partner organizations’ members to join you. Issue a statement, take pictures, submit to the media—this is what we do, and publicizing your legislative day and how your state affects policy is a huge factor in making prospects understand the critical factor that they could potentially play in the industry. The Membership Chair plays a critical role in being the storyteller of the NAIFA chapter and needs to paint the picture of the connection between local, state, and national. The Membership Chair is also a key factor in getting members to go to Capitol Hill for Congressional Conference. Your job is to make sure that your state is fully represented in Washington, D.C.



## Layering the Membership Ask Creates Exponential Growth

Type of Sale	Source of Leads	Responsibility to Close
One-on-One Ask (Individual Sales)	Chapter Events, Leads Generated by Home Office & Provided to Chapters	Volunteers attempt to close on the spot; pass others to Home Office
100% Agency Sales	Primary: Chapters to Identify; Secondary: Home Office	Home Office
Financial Security Guardian Program (Group Sales)	Primary: Chapters to Identify; Secondary: Home Office	Home Office
Win-Back	Former & Lapsed Lists	Chapters
Renewals	Lapsed & Renewal Lists	Chapters

## The NAIFA Advocate. Educate. Differentiate.(AED) Elevator Speech

Determine if the non-member has heard of NAIFA. "Are you familiar with NAIFA?"

### If no, "I'm excited to introduce you then because I belong to NAIFA!"

"NAIFA is the National Association of Insurance and Financial Advisors. I'm sure you have heard of the Bar Association for lawyers. NAIFA is the professional association for insurance and financial advisors. (Proceed to "Main Statement")

If **yes**, NAIFA completely restructured in 2019 to become a dynamic new association after 129 years. That's right, NAIFA took all its strengths—such as state advocacy whereby there is a professional lobbyist in every state capital—and streamlined its operations so that it is a modern association ready to serve a diverse and youthful population of advisors. Just look at the programs we offer to each member! (Proceed to "Main Statement")

## Main Statement

NAIFA members agree, NAIFA does it all. NAIFA advocates for its members and their clients in 50 state capitals and Washington, D.C. It was NAIFA that lobbied for the deferred taxation of inside build-up over 100 years ago. It was NAIFA that prevented the ill-advised fiduciary regulation a few years ago. And, it's NAIFA that is fighting for your clients today. The proposed tax changes could hurt the middle class as well as the rich. Here's a flyer on the topic. (Hand them the Taxation Without Representation flyer.)

NAIFA educates its members so they may better serve their clients. Our members' only program NAIFA Live is second to none in helping you become a more productive and better-educated advisor. It's designed to fit the modern advisor who is on the go and needs the flexibility to get great content where and how it's needed. Now, each month, you get a top-quality speaker to inspire you as part of your membership. Programs are available live and on-demand

NAIFA members are differentiated from non-members as they adhere to a Code of Ethics that includes the requirement that they must act in their clients' best interests. Outside studies have shown they make more money. Our community does business with one another because we all are cut from the same cloth and our word is our bond.

In fact, our membership promise is that if you join NAIFA, we promise that we will do three things. We will Advocate, Educate, and Differentiate you— AED is at the core of NAIFA, which is why we are the largest association and the oldest in the industry.

If you want to be the best and believe in surrounding yourself with the best from which to learn and grow, join NAIFA. That's why I did, and it was the best business investment I ever made. Just go to [naifa.org/join](http://naifa.org/join).

**NOTE:** Should the non-member be a wholesaler, carrier rep, or fund rep, you may want to add: NAIFA membership can open doors for you as you could gain access to more advisors. Personally, I have decided to only work with wholesalers who are NAIFA members.