



# CORPORATE PARTNERSHIP Program Highlights

NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS



[WWW.NAIFA.ORG/CORPORATEPARTNERSHIPS](http://WWW.NAIFA.ORG/CORPORATEPARTNERSHIPS)

## GROWING AND PROTECTING THE INDUSTRY

NAIFA's corporate partnerships focus on strategic membership growth to enhance **industry protection**. These win-win partnerships recognize that as NAIFA's membership grows, in conjunction with company support, our collective voice in Washington, D.C., and throughout the nation is strengthened.

While industry protection is critical, NAIFA knows that agents and advisors need much more than just a voice in Washington and in state capitals. They need constant exposure to new sales ideas, industry news, professional development and networking opportunities.

NAIFA thanks its corporate partners for supporting the organization and the industry. The information below highlights many of the innovative ways our partners promote membership and work with NAIFA to maximize their agents and advisors NAIFA membership experience.

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### ALLIANZ

- Enables producers to use “perks” (performance rewards) for NAIFA membership. Eligible producers enroll online at [www.naifa.org](http://www.naifa.org)

Managers, Field Trainers and home office employees

- NAIFA benefits and awareness included in company sponsored field education programs

### ALLSTATE INSURANCE COMPANY

- Implemented the Allstate NAIFA Enrollment Online (NEO) program to facilitate NAIFA membership enrollment. Dues are advanced by the company and recovered via commission deduction. Participants enroll through Allstate's intranet site
- Endorsement letter on file and disseminated to top company management
- Invited NAIFA to exhibit at regional and leadership meetings

### AXA

- Provides NAIFA membership marketing materials to up-and-coming agents to promote membership
- Endorsement letter on file

### COUNTRY INSURANCE AND FINANCIAL SERVICES

- Distributed NAIFA endorsement letter to field force
- Invited NAIFA to exhibit at company meeting

### AMERICAN FAMILY LIFE INSURANCE

- Sponsors NAIFA dues program whereby producers can have their NAIFA dues paid in full and deducted from agent account statements in six monthly installments
- Endorsement letter on file
- Developed NAIFA benefits talking points for use by all District Sales

### FARMERS INSURANCE GROUP

- Conducted a NAIFA Preview Program to encourage top producers' to join NAIFA
- Routinely runs articles about the importance of NAIFA involvement in company newsletter
- Designed a NAIFA page on company intranet

**LEARN MORE ABOUT NAIFA AND HOW YOUR COMPANY CAN BECOME INVOLVED AT [WWW.NAIFA.ORG/ABOUT/CORPORATE PARTNERSHIPS](http://WWW.NAIFA.ORG/ABOUT/CORPORATE_PARTNERSHIPS) OR CALL 1-877-TO-NAIFA.**

## GENWORTH FINANCIAL

- Invited NAIFA to exhibit at Annual Career Agent Conference

## LIFEMARK SECURITIES CORPORATION

- Promotes NAIFA membership benefits during supervisory meetings, recruitment meetings, and other company communications and publications
- Disseminates NAIFA communications to its representatives
- Strong support of NAIFA and involvement by executives of the firm
- Promotes NAIFA convention participation and the value of NAIFA membership

## MASSMUTUAL

- Endorsement letter on file
- Sponsors NAIFA dues for new general managers
- Invited NAIFA to exhibit at company's educational conferences and top producers' conference
- Provides national dues reimbursement for Rising Leaders

## MODERN WOODMEN OF AMERICA

- Endorsement letter on file
- New representatives are sent a membership kit supplied by NAIFA along with an endorsement letter from a MWA company official
- Membership is required for some incentive programs
- NAIFA membership is referenced on intranet
- Sponsors a dues payment program where dues are paid by the

home office and debited from representatives' commission accounts over several months

- Provides dues reimbursements for representatives ranging from \$100 to full reimbursement depending on length of service and production club status
- Provides financial assistance to voting delegates who attend NAIFA's annual convention

## MONUMENTAL INSURANCE

- Provides payroll deduction program for NAIFA dues
- Reimburses application fees and national dues for industry awards recipients
- Endorsement letter on file

## NEW YORK LIFE INSURANCE COMPANY

- Established New York Life's NAIFA Membership Program for agents and field managers to advance NAIFA dues payments and deduct from agents' ledgers and managers' credits
- Requires NAIFA membership to receive reimbursements for course tuition, required textbooks and fees leading to a professional industry designations or graduate degrees
- Requires NAIFA membership to be eligible for "fly-ins" for participation in government relations and lobbying activities
- Endorsement letter on file

## NORTHWESTERN MUTUAL FINANCIAL NETWORK

- Implemented a NAIFA national dues reimbursement program whereby representatives receive reimbursement for the national portion of their membership dues if 90% or more of the eligible representatives in their agency are NAIFA members
- Strong senior leadership endorsement of NAIFA at company meetings and in newsletters
- Invited NAIFA to exhibit and promoted NAIFA membership at the company's annual conference
- Promoted the Manager's Membership Award (MMA) to their managers and provided additional company recognition for achievers
- Endorsement letter on file

## PRINCIPAL FINANCIAL GROUP

- Implemented a program to reimburse the national portion of NAIFA dues to qualifying career producers in a program also aimed at increasing attendance at the NAIFA Annual Convention and Career Conference
- Endorsement letter on file and distributed to sales force through intranet
- NAIFA and YAT promoted at Principal Life Sales Academy, gathering of top 25 advisors with average two years under contract
- NAIFA promoted in senior management speeches at incentive meetings and agency kickoff meetings
- Annual convention promoted in "Save the Date" sections of management agency presentations and monthly *Spotlight* newsletters

## PRUDENTIAL FINANCIAL

- Advances NAIFA dues via payroll deduction and then recoups them in eight weekly installments
- Conducted a NAIFA Preview Program for the company's non-members to promote the importance of joining NAIFA
- Encouraged agency managers to open their doors to NAIFA associations for membership presentations
- Continuing support of membership recruitment and monitoring of membership results on a territorial basis with territorial vice presidents
- Promoting the Manager's Membership Award and awarding additional recognition to those who achieve it

## SHELTER INSURANCE

- Offers payroll deduction for NAIFA dues by advancing dues for producers and then deducting them over a five month period

## **SOUTHERN FARM BUREAU LIFE INSURANCE**

- Distributed NAIFA endorsement letter to field force
- Contacting their lapsed NAIFA members to encourage joining/renewing
- Monthly promotional pieces in the agents publication (*The Sales Connection magazine*)
- Requires membership in NAIFA if an agent wants SFBLI to assist with the cost of LUTC, FSS, CLU, ChFC or CASL courses
- Assists in the cost of sending new LUTCF designees to the NAIFA Convention and Career Conference
- Developed a customized Farm Bureau/NAIFA promotional brochure
- Also provides assistance in the cost of sending the top ten agents and top ten new agents to the NAIFA Convention and Career Conference
- Reimburses the national portion of NAIFA dues to each recipient of an Industry Club Award
- Advances the payment of dues to all new or renewing members in NAIFA
- Provides financial support to agents that are seeking or holding office in their state or local association
- Promotes attendance at state conferences
- Pays first year dues to the top training agent in each of the 26 schools held annually
- Pays dues for field Sales Management personnel

## **STATE FARM INSURANCE**

- Collaborated with NAIFA to provide non-members with a free preview of NAIFA benefits

- Continues full dues reimbursement program for their managers across the country
- Encourages zone executives across the country to pay the first year memberships for their interns
- Revised a NAIFA/State Farm marketing brochure and presentation and distributed them throughout the field
- Invited NAIFA to exhibit at agent conference
- Promoted NAIFA in a series of articles in the company newsletter and intranet site
- Endorsement letter on file

## **THRIVENT FINANCIAL FOR LUTHERANS**

- Collaborates with NAIFA to market membership to all of the company's non-members by providing them with a free NAIFA preview
- Invited NAIFA to exhibit at the company's annual agent conference and to co-host an educational session at the event
- Endorsement letter on file

## **UNIFI COMPANIES**

- Promoted NAIFA at top producers' meeting
- Sponsors NAIFA dues program that deducts NAIFA dues from representatives' paychecks

## **WOODBURY FINANCIAL**

- Endorsement letter on file, distributed to field force and posted on company's website
- Invited NAIFA to exhibit at the company's annual agent conference

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