

NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS

2009-10

# Industry Awards



NAIFA Industry Awards help advance your career.

In fact, Companies know the value of NAIFA Industry Awards.

Are you an award qualifier who sells exclusively with any of the companies listed below? If so, you do not need to complete an award application. Your company will submit your application and pay your application fee for you.

- Alfa Insurance
- Country Insurance and Financial Services
- Farm Bureau Insurance
- Horace Mann
- Kansas City Life Insurance
- Modern Woodmen of America
- Northwestern Mutual Financial Network
- Securian Financial Group
- Southern Farm Bureau
- Thrivent Financial for Lutherans
- Western Southern Financial

Other companies provide reimbursement for Industry Awards application fees and additional incentives. For more information please contact the Professional Development and Education Department at 1-877-TO-NAIFA (866-2432) or [memberbenefits@naifa.org](mailto:memberbenefits@naifa.org).

For more than 60 years, NAIFA's Industry Awards Program has recognized excellence, professionalism and achievement in the insurance and financial services industry. This program also embraces the overall mission of NAIFA – to enhance business and professional skills, and promote the ethical conduct of our members.

NAIFA's Industry Awards Program:

- Recognizes excellence as a means of encouraging members to achieve high standards in their professional roles and responsibilities
- Recognizes and encourages individual achievement
- Demonstrates skill and professionalism
- Encourages new members of the association to strive to achieve the highest possible standards of professionalism

**“Apply online at [www.NAIFA.org](http://www.NAIFA.org).”**

N  
Q  
A



### National Quality Award

This measure of your persistency records shows that the policies you sell stay in force and that you are dedicated to your clients' financial goals and protection.

N  
S  
A  
A



### National Sales Achievement Award

NAIFA's award for top producers, the NSAA recognizes you for writing large numbers of life and health policies.

N  
M  
S  
A



### National Multiline Sales Award

The NMSA recognizes you, the multiline agent, for meeting a variety of your clients' needs by writing large numbers of life and property and casualty policies.

NAIFA INDUSTRY AWARDS DEMONSTRATE YOUR SKILL AND PROFESSIONALISM.

**Here's what NAIFA members have to say...**

*“The effort to qualify for the National Multiline Sales Award is analogous to a master weaver, who carefully forms a quilt to cover the client completely. The fibres of Property & Casualty and Financial Services have enabled me to multiply my retention and substantially improve my profitability while covering my client's risks.”*

Winston L. Dookram, LUTCF, CSA, LTCP  
State Farm Insurance Companies  
West Babylon, NY  
NMSA 9 years, NSAA 13 years

*“The NQA is the measure of professionalism and achievement that a financial representative has consistently walked the talk in making appropriate, ethical sales to clients.”*

Robert O. Smith, J.D., CLU, ChFC, LIC  
Northwestern Mutual Financial Network  
Grand Rapids, MI  
NQA 17 years

*“Qualifying for the National Quality Award annually reminds me to do business the way it should be done; understanding our clients, putting their needs first, recommending the right solution and providing ongoing service.”*

Anthony G. Blasting, CLU, ChFC,  
CFP, AEP  
Northwestern Mutual Financial Network  
Williamsville, NY  
NQA 15 years

*“As an NSAA achiever I know that my production is meeting my high standards and continuing to build momentum. Professional success as indicated by the NSAA allows me to be an effective advocate for my clients.”*

Sharon Welch-Blair, CLU, ChFC  
Empire Financial Architects  
Little Rock, AR  
NQA 16 years, NSAA 14 years

## SECTION I: Personal Information

Type or Print Clearly

NAIFA Member Number (On the *Advisor Today* mailing label)

Email Address

Name  
(Include all designations as they should appear on an award item)

Present Company — Full name of insurance company\*\*

\*\* If applying as an INDEPENDENT, write "Independent" in the Present Company line. If you must use sales in more than one company to meet award requirements, you will be processed as an "Independent".

Mailing Address

**NOTE:** Policy totals for each company may be itemized on a separate sheet. You need not complete a separate section for each company.

City/State/Zip Code

Phone Number

## SECTION II: Application Requirements

To meet eligibility requirements you must:

A. Provide the \$30.00 application fee.

**NOTE:** Payment must accompany application in order to be processed.

Check payable to NAIFA

Credit Card:  Mastercard  AMEX  VISA

Credit Card Number

Exp. Date

Signature

B. Be a member of a local NAIFA association

Name of Local Association

**NOTE:** Award items will be shipped to local association for presentation.

C. Work full time in the insurance business or other closely related financial services profession

D. Application received by NAIFA by April 1, 2010

## SECTION III: Qualifications

Company affiliation at the time:  Same as above  Other:

Policy exchanges, updates and term conversions in the first 13 months effected and approved by the same company that issued the original policy will not result in a penalty to the agent. The agent will receive no credit for updated, or new policies, and not be charged a first-year lapse for the original policy.

**Write a minimum of 40 life policies.** 10 policies may be individual disability income (DI) policies or long-term care (LTC).

If you are using DI policies to make up 25 or 40 policies, a 90% persistency is required for all DI sold in **2008** whether 10 or fewer are used. You must achieve 90% persistency for a minimum of 13 months.

**NOTE:** If qualifying for the 28th year or more, you are "grandfathered" and can qualify with 25 policies, 10 of which may be disability income policies or long-term care (LTC).

**NOTE:** A policy credit is given where increases in the policy generate first-year commission for increases above the amount on which first-year commissions were previously paid. A corresponding policy lapse would occur when a similar decrease is experienced within 13 months after the increase. (Consult the certifying company for any applicable minimum for policy count credit.)

A. Number of eligible Life policies paid for in **2008**.....

B. Number of **2008** Life policies on which any part of 2nd year premium (**2009**) was paid.....

C. Percentage % (Divide line B by line A).....

### PLEASE CONTINUE ONLY IF USING DI POLICIES

D. Number of DI policies sold in **2008**.....

E. Number of **2008** DI policies on which any part of 2nd year premium was paid.....

F. Persistency % (Divide line E by line D).....

G. TOTAL number of policies sold in **2008**.....

H. TOTAL number of policies renewed in **2009**.....

I. Persistency percentage.....

## SECTION IV: Endorsements

I hereby attest that I am engaged full-time in the insurance business and that the information presented is correct.

Applicant Signature

Date Signed

**PLEASE NOTE:** NAIFA may verify your information with your company; you do not need to have your company sign this form.



## APPLY ONLINE

[www.naifa.org](http://www.naifa.org)

## DEADLINES

April 1, 2010 – Applicant must be a NAIFA member in good standing

April 1, 2010 – Application postmarked to NAIFA with \$30 application fee

## RECOGNITION

Recipients will be posted online at [www.naifa.org](http://www.naifa.org) by September 30, 2010. All award items will be sent to local associations.

## POLICIES NOT ELIGIBLE

- All policies are eligible, except:
- Accident, health and sick benefit insurance
  - Group and wholesale contracts
  - Policy changes
  - Renewal of term policies converted within the same award year will not receive an additional policy credit
  - Single premium annuities (NOTE: all other annuities are eligible.)
  - Weekly premium insurance
  - No policy credit will be given for automatic policy increases that do not generate first-year commissions

## SEND COMPLETED APPLICATIONS TO:

National Association of Insurance and Financial Advisors  
Industry Awards  
PO Box 75057  
Baltimore, MD 21275

## QUESTIONS?

Contact NAIFA's Professional Development and Education Department toll-free: 877-866-2432  
[memberbenefits@naifa.org](mailto:memberbenefits@naifa.org)

NOTE: All award items will be shipped directly to your local association in Fall 2009.



## ANNUAL AWARD

### NQA Classic Award

Desktop award featuring NAIFA pyramid and highlighting the award year.

## 2010 NATIONAL QUALITY AWARD

### NQA Certificate and Lapel Pin

The NQA Award Certificate features the NAIFA NQA logo and highlights the following accomplishment years: 10 Years, 20 Years, 25 Years, 30 Years, 40 Years, 50 Years



## NQA Merchandise

Showcase your achievements! Use this order form to order products in addition to your award.

### NQA Merchandise Order Form

QTY	Item Name	Price
	NQA Magnetic Plate (\$12.00) Year: _____	
	NQA Embossed Edition Certificate Frame (\$149.00)	
	NQA Engraved Medallion Paperweight (\$27.50)	

**TOTAL \$** \_\_\_\_\_

Prices and Availability are subject to change. Visit [www.naifaawards.com](http://www.naifaawards.com) for more NQA Merchandise.

### Payment Information

Credit Card:     Mastercard     AMEX     VISA

Credit Card Number \_\_\_\_\_

Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

### Shipping Address for NQA Merchandise

Name \_\_\_\_\_

Company \_\_\_\_\_

Street Address (No PO Boxes) \_\_\_\_\_

City/State/Zip \_\_\_\_\_



### NQA Magnetic Plate

Magnetic Plate to fit old style plaque. Plaque no longer available.

\$12.00 Please state year

## SECTION I: Personal Information

Type or Print Clearly

NAIFA Member Number (On the *Advisor Today* mailing label)

Phone Number

Name  
(Include all designations as they should appear on an award item)

Email Address

Mailing Address

Present Company — Full name of insurance company\*\*

City/State/Zip Code

\*\* If applying as an INDEPENDENT, write "Independent" in the Present Company line. If you must use sales in more than one company to meet award requirements, you will be processed as an "independent".

**NOTE:** Policy totals for each company may be itemized on a separate sheet. You need not complete a separate section for each company.

## SECTION II: Application Requirements

To meet eligibility requirements you must:

A. Provide the \$30.00 application fee.

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Check payable to NAIFA

Credit Card:  Mastercard  AMEX  VISA

Credit Card Number

Exp. Date

Signature

B. Be a member of a local NAIFA association

Name of Local Association

NOTE: Award items will be shipped to local association for presentation.

C. Work full time in the insurance business or other closely related financial services profession

D. Application received by NAIFA by April 1, 2010

## SECTION III: Qualifications

Company affiliation at the time:  Same as above  Other: \_\_\_\_\_

To qualify for the NSAA, the applicant must have sold a minimum of 100 paid policies in the year prior to the application.

An increase of at least \$10,000 on flexible premium/face amount type policies with a corresponding increase in annualized plans' periodic premium may be included in the 100 cases.

### Eligible Policies

All annual premium and flexible premium life policies (including term conversion)

- Renewable term policies
- Payroll deduction and salary savings (individual policies)
- Individual policy pension plans and deposit administered pension plans (five lives equal one life credit)

- Group medical, life and disability plans (counts as one life per group)
- Annuities, annual, flexible and single premium policies
- Individual disability income policies (guaranteed renewable and/or non-cancelable)
- Individual health insurance policies (major medical, long term care or Medicare Part D)
- Single premium life policies

### Ineligible Policies

- Temporary health coverage policies
- Accident only policies and other travel/accident policies

Number of lives insured in 2009 \_\_\_\_\_

## SECTION IV: Endorsements

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## RECOGNITION

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## SEND COMPLETED APPLICATIONS TO:

National Association of Insurance and Financial Advisors  
Industry Awards  
PO Box 75057  
Baltimore, MD 21275

## QUESTIONS?

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[memberbenefits@naifa.org](mailto:memberbenefits@naifa.org)



## ANNUAL AWARD

### NSAA Classic Award

Desktop award featuring NAIFA pyramid and highlighting the award year.

## 2010 SALES ACHIEVEMENT AWARD

### NSAA Certificate and Lapel Pin

The NSAA Award Certificate features the NAIFA NSAA logo and highlights the following accomplishment years: 10 Years, 20 Years, 25 Years, 30 Years



## NSAA Merchandise Showcase your achievements! Use this order form to order products in addition to your award.

### NSAA Merchandise Order Form

QTY	Item Name	Price
	NSAA Magnetic Plate (\$12.00) Year: _____	
	NSAA Embossed Edition Certificate Frame (\$149.00)	
	NSAA Engraved Medallion Paperweight (\$27.50)	

**TOTAL \$** \_\_\_\_\_

Prices and Availability are subject to change. Visit [www.naifaawards.com](http://www.naifaawards.com) for more NSAA Merchandise.

#### Payment Information

Credit Card:     Mastercard     AMEX     VISA

Credit Card Number \_\_\_\_\_

Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

#### Shipping Address for NSAA Merchandise

Name \_\_\_\_\_

Company \_\_\_\_\_

Street Address (No PO Boxes) \_\_\_\_\_

City/State/Zip \_\_\_\_\_



### NSAA Magnetic Plate

Magnetic Plate to fit old style plaque. Plaque no longer available.

\$12.00 Please state year

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C. Work full time in the insurance business or other closely related financial services profession

D. Application received by NAIFA by April 1, 2010

## SECTION III: Qualifications

Company affiliation at the time:  Same as above  Other: \_\_\_\_\_

### Policies not Eligible for all Qualifications

- Temporary health coverage policies
- Accident only policies, and other travel/accident policies
- All group (medical, life, disability, automobile or fleet)
- Multi-peril crop insurance
- Assigned risk (all government/pooled insurance business)

1. \$20,000 of new paid life premium with a minimum of 15 new life applications or 40 new life applications

### Policies Eligible:

- All annual premium and flexible premium life policies (includes term conversion)
- Single premium life policies
- Renewable term policies
- Payroll deduction and salary savings (individual life policies)

**New Life applications in 2009** \_\_\_\_\_

**New Life premiums in 2009** \_\_\_\_\_

2. 250 new property and casualty policies issued.

### Policies Eligible

- Fire and allied lines (includes personal and commercial)
- Casualty insurance (includes personal and commercial auto insurance)

**New Property and Casualty policies in 2009** \_\_\_\_\_

3. Cross-sell 100 applications of an additional line for new and/or existing clients (not an increase over the 250 applications necessary for qualification #2 above)

### Policies Eligible

- All policies listed as eligible in qualification #2 above
- Individual policy pension plans and deposit administrated pension plans
- Annuities, annual, flexible and single premium policies
- Individual disability income policies (guaranteed renewable and/or non-cancelable)
- Individual health insurance policies (major medical and long-term care)

**Additional policies cross-sold in 2009** \_\_\_\_\_

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Applicant Signature

Date Signed

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## ANNUAL AWARD

### NMSA Classic Award

Desktop award featuring NAIFA pyramid and highlighting the award year.



## 10 YEAR AWARD

### NMSA Certificate and Lapel Pin

The NMSA Award Certificate features the NAIFA NMSA logo and highlights a 10-year accomplishment.

## NMSA Merchandise

Showcase your achievements! Use this order form to order products in addition to your award.

### NMSA Merchandise Order Form

QTY	Item Name	Price
	NMSA Magnetic Plate (\$12.00) Year: _____	
	NMSA Embossed Edition Certificate Frame (\$149.00)	
	NMSA Engraved Medallion Paperweight (\$27.50)	

**TOTAL \$** \_\_\_\_\_

Prices and Availability are subject to change. Visit [www.naifaawards.com](http://www.naifaawards.com) for more NMSA Merchandise.

### Payment Information

Credit Card:     Mastercard     AMEX     VISA

Credit Card Number \_\_\_\_\_

Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

### Shipping Address for NMSA Merchandise

Name \_\_\_\_\_

Company \_\_\_\_\_

Street Address (No PO Boxes) \_\_\_\_\_

City/State/Zip \_\_\_\_\_

A PROUD QUALIFIER FOR  
14 YEARS

### NMSA Magnetic Plate

Magnetic Plate to fit old style plaque. Plaque no longer available.

\$12.00 Please state year