

Comprised of six components:

✓ **Product/Industry Knowledge Programs**

✓ **NAIFA Seminar Series**

✓ **NAIFA Sales System**

✓ **NAIFA Convention & Career Conference**

✓ **NAIFA Leadership in Life Institute (LILI)**

✓ **NAIFA Industry Awards Program**

Product/Industry Knowledge Programs

Comprised of more than 60 courses that lead to 19 industry-recognized designations, including LUTCF and FSS, NAIFA's Professional Training Series lays out a suggested course of study across five practice specialties—Life Insurance and Annuities, Health and Employee Benefits-Endorsed by AHIA, Multiline, Financial Advising and Investments, and Practice Management--and three career stages—early, established and accomplished—for NAIFA advisors and agents (see the enclosed schematic for details).

Supported by programs and study materials from The American College, American Institute for CPCU (AICPCU) and America's Health Insurance Plans (AHIP) with additional course materials in development, many of these programs are offered at special NAIFA member discounts. Visit www.naifa.org/pts for more information.

NAIFA Sales System

A four-month sales skills development program comprised of 12 online modules using Fundamentals of Integrity Selling® courseware based on the concepts found in the book, Integrity Selling for the 21st Century by Ron Willingham, founder of Integrity Solutions, an international leader in sales and customer service training and development with more than 2,000 client companies and supported by eight live group telecoaching sessions led by experienced sales coach, Robert A. Arzt, CLU, ChFC, LLIF, president and founder of Insurance Coach U™.

For more information visit www.regonline.com/naifasalessystem

NAIFA Leadership in Life Institute (LILI)

A six-month leadership development program offered exclusively to NAIFA members. Based on the thought leadership of Stephen Covey, Jim Collins, John Maxwell and Kouzes & Posner, the curriculum includes creating a business plan, developing self-mastery skills, developing team leadership skills, leveraging assessment tools to improve your practice and exploring service opportunities. Ongoing opportunities for growth are also offered through LILI alumni programs.

NAIFA Seminar Series

Online and moderator-led seminars, many of which are eligible for state CE credit, that address timely topics for all career stages including the popular Programs-in-a-Box series developed by NAIFA National and delivered through NAIFA state and local associations and LIMRA's Market Awareness Series.

In this new joint venture, NAIFA joins LIMRA in offering to NAIFA members as a free member benefit a monthly online video-based seminar series. Beginning September 2008, NAIFA members will have unlimited access to the program showcased for the month indicated. Each video is 30-40 minutes in length and features LIMRA subject matter experts for the selected topic. All programs are designed to provide you background information on the topic, explain what this means to you as an advisor or agent and include sales tips for presenting the material to clients.

(Visit www.naifa.org for a complete list of featured programs).

NAIFA Convention and Career Conference

NAIFA's annual gathering that includes:

- ✓ **Dynamic main stage presentations**
- ✓ **Insightful seminars and workshops focused on five practice specialties and other popular topics:**
Life Insurance & Annuities | Health & Employee Benefits - Endorsed by AHIA | Multi-Line
Financial Advising & Investments | Practice Management | Sales Prospecting & Marketing | Leadership
- ✓ **Valuable networking opportunities**
- ✓ **Useful exhibitor products and services—all designed to help you learn more to earn more!**

NAIFA Industry Awards

Recognize NAIFA members for excellence as indicated by quality service and sales achievement. The program includes the National Quality Award, National Sales Achievement Award and National Multi-Line Sales Award.

For more information visit the NAIFA website at www.naifa.org



NAIFA Virtual Library and Virtual Assistant

The single most comprehensive, user-friendly online resource tool that supports a financial advisor or insurance agent regardless of his/her practice specialty, distribution channel or career level. NAIFA members have free and unlimited access to this extensive online library that includes fact finders, concept pages, business tips and tools, client presentations, tax information and specimen documents. NAIFA members may purchase the upgrade—the NAIFA Virtual Assistant—at a discounted rate.

NAIFA's Advisor Today Articles and Podcasts

An award-winning, monthly publication and a leading source of news and information for insurance and financial advisors. *NAIFA's Advisor Today* articles and podcasts feature tips and insights from industry experts on a variety of topics including sales, prospecting and marketing ideas, industry trends, and practice management that can enhance your business and increase sales.

NAIFA Communications Corner

One of the newest benefits for NAIFA members. This online resource includes tips, tools and templates to assist NAIFA members in their local media outreach efforts.

The Partnership for Retirement Education and Planning (PREP) Toolkit

The Partnership for Retirement Education and Planning (PREP), an unprecedented collaboration of financial services professionals, focuses its partners on helping Baby Boomers better understand and overcome their financial challenges by improving financial literacy for Boomers.

This toolkit comprised of various Boomertirement® materials provides resources for NAIFA members to use in their efforts to reach and communicate with Baby Boomers regarding these critical financial planning issues and includes a planning guide, along with sample media, marketing and presentation materials.

To learn more, visit www.naifa.org/prep.

LIMRA/NAIFA Sales Booster Assessment Tool

LIMRA and NAIFA have partnered to offer Sales Booster™, a sales development tool that is designed to help producers align their thinking with their sales objectives as well as uncover tendencies that may unknowingly prevent them from achieving better results.

Sales Booster is a 60-question online exercise that assesses six sales success factors related to how producers think—Belief in Self, Focus on the Sale, Drive to Succeed, Belief in the Client, Focus on the Relationship, and Drive to Influence. It identifies and targets one area to develop that will help producers achieve their full potential and provides a detailed report that includes valuable information and specific, action-oriented exercises to immediately enhance sales success.

Future NAIFA Professional Practice Tools & Tips...

will include best practice toolkits, case studies, sample newsletters and other sample marketing and sales materials.



For more information visit the NAIFA website at www.naifa.org



As a NAIFA member, you are eligible for discounts on products and services that can enhance your business success and increase your bottom line including business/management tools, client management tools, sales and marketing tools, business services, and insurance programs. By participating in one or more of these programs, NAIFA members can often more than recoup their membership investment. When contacting the NAIFA Preferred Providers for more information, please don't forget to mention you are a NAIFA member!

BUSINESS MANAGEMENT TOOLS

Copytalk- NAIFA Members Save \$30 off Standard Price

Copytalk's Mobile Scribe is a mobile dictation service that allows you to document client meetings faster and easier than ever before. NAIFA Members pay \$49.95 a month, \$30 off the standard price of \$79.95, for unlimited use with no long-term contracts.

For additional information about Copytalk and Mobile Scribe, visit www.copytalk.com/NAIFA or call 866-267-9825.

Smarsh Financial Visions Websites – NAIFA Members Can Save Up to \$55

Smarsh Financial Visions Websites provides NAIFA members with the most comprehensive, affordable website service available to the insurance and financial services industry. NAIFA members pay \$39.95/month, a savings of \$5 per month, with an initial set-up fee of \$99, a savings of \$50 off the regular set-up fee.

For additional information about Smarsh Financial Visions Websites, visit www.naifawebsites.com or call 800-593-9228.

Horsemouth – Annual Subscription Savings of \$75

Horsemouth, a daily, online service, helps financial advisors increase their client base and grow their business. Members also gain access to a growing database of more than 4,500 articles on sales, marketing, business development, practice management, financial planning and investing.

NAIFA Members receive a 90-day free trial, plus a second 90-days free with the annual Horsemouth subscription of \$189 a year (15 months for the price of 12, a savings of \$75)

ProDial – Special Savings on Long Distance Services

As a NAIFA Member, you receive the lowest possible price per minute for each type of phone service – local toll calls, intrastate, interstate, off-shore and international.

For additional information, go to www.prodial.com/NAIFA or call 800-776-3425.

CLIENT MANAGEMENT/SALES & MARKETING TOOLS

Advisors Assistant – NAIFA Members Receive a \$100 Discount

Advisors Assistant, developed by Client Marketing Systems, is a software program specifically written for registered reps, financial planners, insurance professionals and offices/agencies.

For additional information, visit www.advisorsassistant.com or call 800-799-4267.

Advisys – NAIFA Members Save \$50 off Standard Price

NAIFA and Advisys®, Inc., formerly Kettley Publishing, are providing the Back Room Technician®, Sales Edition to NAIFA members at a \$50 discount.

To learn more, go to www.advisys.com/hol/?app=NAIFA or call 800-777-3162.

BUSINESS SERVICES

Bank of America – NAIFA Credit Card, Low Annual Fee, Low APR

Bank of America offers NAIFA members a suite of financial products including the new and improved Bank of America MasterCard, which offers no annual fee and a low APR. NAIFA members may apply for Bank of America's GoldOption® line of credit, preferred CD rates and Money Market accounts.

For more information, call 800-932-2775.

FedEx – NAIFA Members Can Save Up To 27% With FedEx

Through NAIFA's FedEx Advantage Program, members are eligible for special association member pricing – up to 27% off select FedEx shipping services.

To find out more, please call 800-MEMBERS or log onto www.1800members.com/naifa.

Hertz – NAIFA Members Save Up to 15%

NAIFA Members save up to 15% off the standard rates for daily, weekend, weekly and monthly rentals.

For additional information, visit www.hertz.com or call 800-654-2200.

*Your Hertz CDP# 44526 is the key to your NAIFA Member discount. CREDIT CARD PROGRAM

JoS A. Bank – NAIFA Members Can Save 20% With JoS A. Bank

NAIFA members can now save 20% with JoS A. Bank corporate credit card.

For more information, call 800-285-BANK. Your NAIFA Corporate ID is #8609.

Office Depot – NAIFA Members Can Save an Average of 30% List Price Items

NAIFA Members are eligible to receive an average savings of 30% off the standard list price of thousands of Office Depot items. "Best Value" pricing available on a wide range of office essentials.

Sign Up For the Office Depot Members-Only Program Today at <https://bsd.officedepot.com/index.do>.

UPS – NAIFA Members Save up to 30%

NAIFA members may now save up to 30% on an expanded portfolio of air and international Express shipping services.

For complete details, go to www.savewithups.com/naifa or call 800-325-7000.

INSURANCE PROGRAMS

Aon – NAIFA-endorsed Professional Liability Insurance Program

The NAIFA-endorsed Professional Program now offers new coverage options for Fee-Based Financial Planning and RIA Activities; 529 Plans; Life Settlement and Life Settlement Referrals.

For information on all available coverage options and features, and/or how to apply, visit www.naifainsurance.com.

Kelsey National – Special DI Group Pricing and Guarantee Issue Available

As a NAIFA Member, you receive exclusive group pricing on the NAIFA Advantage-Plus Group Disability Income Insurance Protection Plan.

For additional information, visit www.kelsey.com/naifa or call 800-366-5656, option 3.

For more information visit the NAIFA website at www.naifa.org



Gather with your industry peers and other valuable business contacts and participate in local, national and online networking events. Attend local and state NAIFA meetings, participate in the [YAT - MDRT/GAMA Mentoring Program](#), or if a LILI alumni, join the [LILI online social networking site](#).

- ✓ [NAIFA Netsite](#) — online social networking site
- ✓ [NAIFA Neighborhood Network](#) — brings together gatherings of NAIFA agents and advisors with professional groups from other industries including accountants and attorneys
- ✓ [NAIFA Mentor Center and NAIFA Coach](#) — matches early career agents and advisors with more established and accomplished producers as well as industry experts to help improve business practices

Coming Soon!



For more information visit the NAIFA website at www.naifa.org

Tap into NAIFA's talent pool of industry experts. Gain valuable sales, marketing, practice management ideas and up-to-date product knowledge through timely podcasts. Gain additional insights through presentations by MDRT speakers and NAIFA industry experts at NAIFA local and state meetings and the National Convention and Career Conference.

- ✓ **NAIFA ProCast** — podcasts featuring NAIFA industry experts discussing timely topics.
– *Coming Soon!*
- ✓ **NAIFA and MDRT Speakers Bureaus** — a roster of industry experts available to speak at state and local events.
- ✓ **NAIFA Spokesperson Directory** — a roster of NAIFA members who serve as issues-based subject matter experts and are available for local media outreach.
- ✓ **NAIFA Speakers Video Library** — archived speaker presentations on a variety of timely topics that can be featured at state and local events – *Coming Soon!*



For more information visit the NAIFA website at www.naifa.org