





NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS



YAT – Young Advisors Team

Professional Development – Training, Tools and Resources

TRAINING/TOOLS	RESOURCES
<p>NAIFA Young Advisor’s Team (YAT) is dedicated to the needs and interests of members who are 40 years of age and under or within the first five years in the industry. Features targeted products, programs, services and networking opportunities.</p>	 <p>NAIFA’s Young Advisors Team (YAT) www.naifa.org/benefits/yat/index.cfm</p>
<p>The NAIFA Leadership in Life Institute (LILI) is devoted to advancing your personal growth, business practices, and professional skills. Through this six-month leadership program, NAIFA members investigate professional and personal topics with the goal of enriching every aspect of their lives, from family to business to association. Based on the thought of leadership by Stephen Covey, Jim Collins, John Maxwell and Kouzes & Pozner, topics include time management, vision and mission statements, effective relationships, and business plans.</p>	 <p>NAIFA Leadership in Life Institute (LILI) www.naifa.org/benefits/lili</p>
<p>Free monthly podcasts featuring industry experts discussing a wide range of sales, marketing, prospecting and practice management topics.</p>	<p>NAIFA’s <i>Advisor Today</i> magazine and podcast series— FREE “Building a More Successful Practice”. www.advisortoday.com</p>
<p>Free, 24/7 access for NAIFA members to this comprehensive, user-friendly online library that includes fact finders, concept pages, business tips and tools, client presentations, tax tables and specimen documents.</p>	<p>NAIFA Virtual Library FREE www.naifa.org/benefits/vsa/index.cfm</p>
<p>Free members-only webinars featuring timely information and training on sales, marketing, practice development, life insurance and annuities, health and employee benefits, multiline, and financial advising and investments topics.</p>	<p>NAIFA Monthly Webinar Series FREE www.naifa.org/benefits/speaker_center/webinars</p>
<p>Free online training and information programs on various topics important to running your business and enhancing your success, including practice management, sales, marketing, and prospecting. These video-based programs are available 24/7 and are further enhanced by downloadable print materials and resources.</p>	<p>NAIFA Online Seminar Series FREE www.naifa.org/benefits/prof_programs/online.cfm</p>
<p>Free client web marketing and referral tool – a monthly podcast on life, health, long term care, disability and critical care insurance designed to educate and motivate your clients and prospects.</p>	<p>NAIFA ClientCast™ by ReaWealth® FREE www.naifaclientcast.com</p>

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<p>NAIFA has partnered with Reg Ed to provide 24/7 access to hundreds of quality courses at specially negotiated rates – includes pre-licensing, firm element, PACE, ClearCert certified LTC partnership training and state insurance CE.</p>	<p>NAIFA Online CE with Reg Ed www.naifa.org/benefits/prof_programs/onlineCE.cfm</p>
<p>Premier educational and training provider of courses that support insurance and financial advisors leading to industry-recognized designations</p>	 <p>The American College www.naifa.org/benefits/education/professional.cfm</p>
<p>Free, 24/7 access to online, multimedia learning and training resource that features content from top producers and experts in the financial services industry – sales skills, marketing, product knowledge, practice management and motivation – all at a special NAIFA discount.</p>	 <p>Hoopis Advisor Network for NAIFA www.han4naifa.com</p>
<p>Proven sales skill development training program presented in 12 online modules using “Fundamentals of Integrity Selling”™ and supported with action-oriented skill development and useful feedback from experienced sales coach, Robert A. Arzt, CLU, ChFC, LLIF</p>	 <p>NAIFA Sales System www.naifa.org/benefits/sales</p>
<p>A comprehensive marketing program developed by Annette Bau, CFP® and delivered in eight online modules with optional coaching support that helps you identify your target market, create a marketing plan and effective follow-up system, and generate leads and referrals. Offered to NAIFA members at a special discount.</p>	<p>Million Dollar Marketing System www.naifa.org/benefits/prof_tool_tips/salestools/index.cfm</p>
<p>Online video training program designed with features unique to NAIFA members which employs a four-step process to help you identify, refine and build your “elevator speech.”</p>	<p>The Value Pitch Process™ www.thewisdomlink.com/valuepitch</p>
<p>An efficient and effective step-by-step process that will help you develop an actionable business plan to take your practice to the next level. This powerful tool includes valuable tips, templates, and examples specifically for agents and advisors. Available in either a workbook / CD package or online version and offered to NAIFA members at a special discount.</p>	<p>The One Page Business Plan® - Financial Services Edition www.onepagebusinessplan.com/naifa</p>
<p>Resource materials authored by NAIFA members and strategic partners on topics of interest, including sales, marketing, prospecting, and practice development.</p>	<p>NAIFA Bookstore on the NAIFA Marketplace http://secure.naifa.org/naifamarketplace</p>
<p>Microsoft Windows-based powerful sales activity and production data analysis tool with customization and coaching support features. Designed to help individual producers track and boost their sales performance and manage their client cases in a comprehensive yet readily accessible manner.</p>	<p>Career Activity Management (CAM) System® – NAIFA Edition www.naifa.org/benefits/prof_tool_tips/salestools/inbox.cfm</p>
<p>Discount wardrobe programs</p>	 <p>Brooks Brothers and JoS. A. Banks www.naifa.org/benefits/preferred</p>