



# PLAYBOOK

**CONNECTIONS  
THAT  
COUNT**





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Thank you for serving as a YAT Chair in your state or local association.

This playbook offers you an overview of the Young Advisors Team and the tools you have at your disposal to launch and maintain a YAT group in your area. From informing you about specific YAT programs to giving you step-by-step instructions for running your own YAT group, this playbook will help you maximize the YAT experience for your association.

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## INTRODUCTION TO YAT

### WHAT IS YAT?

YAT's mission is to SOW the value of membership with new and young advisors, so they are empowered to SURVIVE their first years in the business, to GROW into involved NAIFA members and become successful advisors who THRIVE in the industry and our association.

NAIFA created its Young Advisors Team because it realized the needs of someone just starting out in the industry are far different from the needs of a veteran who has been working for many years. The purpose of YAT is to research the needs of young advisors and to ensure that they receive the vital tools, resources, and networks necessary to succeed in the financial services industry. Members do not need to “join” YAT; all those 40 and under or within their first five years in the business are eligible to attend YAT events. There is no additional membership cost to be a part of YAT.

### WHY IS YAT IMPORTANT TO MY ASSOCIATION?

To continue the strength of the insurance and financial services industry, the next generation of advisors must be prepared to step into leadership roles within the industry and within NAIFA. YAT is a crucial component to making sure these advisors receive the resources they need to succeed.

### HOW IS YAT ORGANIZED?

The National YAT Subcommittee works closely with other NAIFA national committees to develop future programs and membership initiatives that will specifically benefit professionals who are new to the industry. For information on the National YAT Subcommittee or its members, please visit [www.naifa.org/yat](http://www.naifa.org/yat). To send suggestions to the subcommittee, please email [yat@naifa.org](mailto:yat@naifa.org).

YAT groups also are organized according to state and local organizations. Local YAT chairs work closely with their local and state NAIFA leaders to identify YATs in the area to include in programming, coordinate events and recruit members under 40 or within their first five years to attend YAT activities. To get a list of eligible YAT members in your association, send your request to [yat@naifa.org](mailto:yat@naifa.org). [Click here for a comprehensive list of the YAT groups operating across the country.](#)



## WHAT ARE YATS LOOKING FOR?

- **“Survival” tips:** New advisors are in “survival” mode, so the value of any activity they attend must be high. Event ideas for this group include having a “rising star” panel at a NAIFA meeting that focuses on ways a new advisor can cope in a harsh economic climate. This also gives other NAIFA members exposure to successful peers and helps build support and enthusiasm for your local YAT organization.
- **Expanding client connections:** Another concern of new advisors is meeting professionals such as attorneys, CPAs and mortgage brokers/planners who can help their clients and their businesses. Host a YAT networking event where the price of admission would be to bring another young professional to the event. Promote the event as an opportunity for a new advisor to expand his or her breadth of knowledge and connections across various segments of the financial services industry.
- **Branding:** A more recent concern of new advisors is how to differentiate themselves from everyone else. Have a business coach or marketing expert present ideas on how advisors can brand themselves and make their business more visible with a creative marketing plan.

## HOW DO I ATTRACT INDEPENDENT ADVISORS TO MY YAT EVENTS?

- **Provide a feeling of community:** Local association events allow agents who are normally out there on their own a chance to connect with others who understand their challenges. Host an event that addresses an issue(s) of particular importance to independent advisors.
- **Stress ethics:** NAIFA can convey a sense of security by letting the consumer know that an advisor abides by a stringent code of ethics.
- **Promote the power of networking:** Getting referrals is even tougher for an independent agent. NAIFA allows members to network with other advisors and establish the connections that can lead to more business.

## HOW DO I GET AGENCY MANAGERS TO PROMOTE NAIFA AND YAT?

- **Create inclusive opportunities:** Agency managers are wary of events promoted by just one company. One way to be inclusive is to showcase best practices. Ask two or three managers to serve on a panel and have independents pose questions to them. Having sponsors and speakers who serve all companies are great neutral resources – examples include local tailors/wardrobe consultants, business etiquette firms, communications consultants, etc.
- **Connect YAT with NAIFA:** Have two or more agencies present success stories on mentoring relationships that work in their respective environments.
- **Be visible in your community:** Use local libraries or community centers to host CE classes and professional development opportunities. You can also request agreements to host NAIFA-sponsored events at different company locations. This will underscore the benefits of the industry having honorable and ethical dealings with each other, as well as with their clients.



## YAT CHAIR JOB DESCRIPTION

As YAT Chair, you will want to work closely with your Local President, Local Executive and Membership Chair to organize activities and events that demonstrate the value of YAT and NAIFA membership.

### LOCAL YAT CHAIR RESPONSIBILITIES:

- Identify YATs in your area for inclusion in YAT programming. If you are not able to determine who is a YAT, contact the national YAT staff at [yat@naifa.org](mailto:yat@naifa.org) to get a listing of YATs in your area.
- Make sure the YAT Chair contact information for your local is correct on the YAT webpage, [www.naifa.org/yat](http://www.naifa.org/yat). If the information is incorrect, contact YAT at [yat@naifa.org](mailto:yat@naifa.org).
- Plan YAT-focused activities to occur on a bi-monthly, or at the very least, quarterly, basis. For event ideas, check the YAT webpage.
- Plan and execute an event in March for YAT Awareness Month. This can be done in conjunction with the National Membership Week that occurs in March. Work with your local leaders and Membership Chair for joint activities.
- Promote the [NAIFA Career Conference and Annual Meeting](#) and the YAT activities that occur at the Conference.
- Promote the [YATPAC](#) initiative to YATs in your local and plan an event around the importance of advocacy.
- Check the YAT webpage, [www.naifa.org/yat](http://www.naifa.org/yat) often for the latest news on YAT programs and initiatives. You can also get ideas for events to host in your local by seeing what other associations are doing.
- Promote [YAT's LinkedIn group](#) to your YATs so that they can network with their colleagues and get the latest YAT news.
- If you have YATs that use Twitter, make sure they sign up to follow the [YAT Twitter feed](#).
- Promote the [YAT Leader of the Year Award](#).
- Work with the leadership in your local association to promote *Advisor Today's* Four Under Forty nomination process.
- Fulfill the revised mission of YAT by recruiting those within their first five years in the business, regardless of age, for YAT events.
- Make sure that the YATs in your local are signed up for *YAT Chat*, a monthly online newsletter containing tips and ideas for the young advisor.
- Hold education events using NAIFA's Programs in a Box (PIB). A list of available PIBs can be found in the [Online Leaders Training Center](#).
- Work with your Membership Chair on National Membership Weeks to help recruit young and new advisors to NAIFA.
- Solicit best practices and submit to National YAT by sending narratives to [yat@naifa.org](mailto:yat@naifa.org).



## START YOUR OWN YAT GROUP

If your local association doesn't have a YAT group, work with your leadership to start one. Establishing and running your own YAT group takes organization, dedication and leadership, but with NAIFA's help, you can expand your local networking circle and build critical relationships in your area in a very short time. Here are the critical steps to forming a new YAT group:

### 1) Assess the need for a YAT group in your area.

- Meet with your association leadership to get their assistance in forming the YAT group.
- Email NAIFA at [yat@naifa.org](mailto:yat@naifa.org) to request a list of all members that qualify as YATs in your association.
- "Take the pulse" of YATs in your association to find out their interest in participating in a YAT group in your area.

### 2) Form a committee.

- Identify "YAT Champions" who share your excitement and enthusiasm and recruit them to be on the committee. Your "YAT Champions" don't necessarily have to be YATs themselves; an exec or experienced member can be an excellent resource in helping to get your group started.
- Determine the reasons why you would want to form a new YAT group in your area.
- Develop a list of goals you would like the committee and your new group to accomplish in the first year. Make sure that you plan for a wide range of events; you should have a good mix of networking and educational opportunities to appeal to a wide audience.
- Hold regular committee meetings to discuss upcoming events, give status updates on committee goals and continue building momentum for the group.
- Make sure that you work with your association leadership to keep them apprised of your planning and seek their assistance in budgeting, publicity and membership recruitment.

### 3) Recruit local YAT professionals to get involved.

- Use a variety of methods to communicate with YAT professionals in your area, including phone calls, email, personal visits and direct mail. In addition to current members that are YATs, target non-NAIFA YAT advisors with the intention of recruiting them to NAIFA membership.
- If your association has a regular newsletter, make sure you always submit a YAT-related item to keep YAT awareness high.

### 4) Recognize your volunteers and supporters.

- Host a yearly event to recognize everyone for their hard work and participation.

NAIFA supports you in your efforts to start a new YAT group and is always willing to help. For information or assistance, visit NAIFA's YAT web page or email [yat@naifa.org](mailto:yat@naifa.org).



## MAINTAIN YOUR YAT GROUP

Once you have established your YAT group, you need to devote attention and care to it to make sure it grows and serves the interests of your local YATs. The key to running your YAT group effectively is meticulous planning – regarding everything from local events to leadership. Keep these critical responsibilities in mind as you maintain your YAT group:

- 1) Monitor membership trends in your area to identify young professionals for inclusion in YAT programming.
- 2) Make sure your [YAT group is included on the YAT webpage](#). If any information is incorrect, contact YAT at [yat@naifa.org](mailto:yat@naifa.org).
- 3) Use local events and networking opportunities to recruit new members for NAIFA. These events should occur on a bi-monthly, or least quarterly, basis. [The YAT Chair section](#) of the YAT webpage is constantly updated with ideas for events and activities from YAT groups throughout the federation; check often for the latest postings.
- 4) Spread the word about NAIFA to your local community, especially local businesses and professional organizations.
- 5) Establish leadership roles and responsibilities for your group. Develop a chain of succession and rotate your leadership regularly – annually is the most transparent option.
- 6) Plan and execute an event in March for YAT Awareness Month. For more information on how to plan and run an event, see the next page of this playbook.
- 7) Promote activities that support NAIFA as a whole, such as attendance at the [NAIFA Career Conference and Annual Meeting](#) and contribution to [NAIFA's advocacy efforts through the YATPAC initiative](#).
- 8) Submit your best practices to [yat@naifa.org](mailto:yat@naifa.org) so that other YAT groups can benefit from your experience.
- 9) The YAT Chair section of the YAT web page includes samples of materials that other YAT groups have used. Feel free to use these materials as templates for your own YAT group.



## HOST AN EVENT

The keys to keeping the interest level high for your local YAT group are offering events on a consistent basis and providing value through content and networking. Keep your peers engaged by exceeding expectations! Follow these basic steps for planning an event.

### 1) Form a committee.

- Once again, include enthusiastic and motivated colleagues in the process.
- Brainstorm about compelling content; possibly create a survey to find out what type of events local YATs would attend.
- Consider hosting one potential education event: NAIFA's Program-in-a-Box (PIB) Number 17, "Survive and Thrive in Your First Three Years." Other PIBs can be found on the [Online Leaders Training Center](#).

### 2) Identify potential collaborative partners.

- Find local chapters of national accounting, legal, banking and realtor associations in your area.
- Reach out to leaders of these local associations to find collaborative event-hosting opportunities.
  - Introduce yourself with a letter – samples are available at [www.naifa.org/yat](http://www.naifa.org/yat).
  - Identify areas of mutual interest and highlight event ideas that would benefit the potential partner organization's members.
  - Follow up with a phone call and plan a face-to-face meeting with potential partners.
  - Develop a meeting agenda to keep the initial meeting flowing efficiently.

### 3) Plan the event. [Ideas and best practices are warehoused on the YAT web site.](#)

- Keep it simple; consider discussion topics that are most relevant to young professionals.
- Look into ways to secure continuing education (CE) credits for the event. Work with your local leadership to determine how you can do this.
- Start searching for a location 2-3 months in advance. Keep the following criteria in mind:
  - Price per person
  - Location
  - Time of event (after-work gatherings are best)
- Contact NAIFA for national and YAT-specific marketing collateral to distribute at the event.
- Don't forget the FOOD!





#### 4) Enthusiastically promote the event.

- Start spreading the word at least 6 weeks in advance.
- Use e-mail, direct mail, e-vites, advertisements in your newsletters, and other methods to market the event.
- Use your committee to deliver personal invitations to local agencies.
- Target specific segments (manager, individual proprietors, etc.) and tailor your message to meet their interests.
- Consider seeking sponsorships from local vendors to help defray the cost for attendees.
  - Keep individual sponsorship amounts to a manageable amount (no more than \$250). Work with your local leadership to manage these funds through your association's banking account.
  - Ask committee members to seek sponsorships from their own agencies.

#### 5) Host the event.

- Be sure to welcome everyone and thank them for coming. And remember it's all about NAIFA! If you have non-NAIFA members at your event, make sure they have information on how to join NAIFA. If your event consists entirely of NAIFA members, highlight the successes of NAIFA and YAT in your opening statements.
- Provide name badges to make networking easier.
- Collect business cards to help build a database that will assist in promoting future events. A raffle is a great way to collect business cards.
- Seek feedback from attendees through a questionnaire, which will help you plan future events; sample questionnaires are available at [www.naifa.org/yat](http://www.naifa.org/yat).

#### 6) Follow up with attendees and partner organizations.

- Thank attendees again for coming and remind them to fill out the questionnaire if they haven't done so (send it electronically to make it convenient for them).
- Thank partner organizations for their help and congratulate them on a job well done; lay the foundation for future events.

#### 7) Keep the lines of communication open.

- Keep in regular contact with local professionals and partner organizations.
- Seek input and future involvement from attendees.
- Keep them informed of future events!



As a YAT Chair, potential members will most likely ask you “What’s in it for me?” Use this chart to show them just how much they receive for their dues. You can also direct members to the [Member Benefits Calculator](#), which allows members or potential members to calculate their own savings. For more information about any membership benefits, visit [www.naifa.org/yat](http://www.naifa.org/yat) or email [yat@naifa.org](mailto:yat@naifa.org).

# YAT PROGRAMS AND RESOURCES

MEMBERSHIP BENEFITS	HOW YOU RECEIVE THEM
<b>PROFESSIONAL DEVELOPMENT</b>	
Networking opportunities	<ul style="list-style-type: none"> <li>▲ Young professional networking events</li> <li>▲ NAIFA’s Career Conference &amp; Annual Meeting</li> <li>▲ State and local meetings and events</li> <li>▲ NAIFA Netsite (online social networking)</li> </ul>
Individual attention and mentoring	<ul style="list-style-type: none"> <li>▲ Local association mentoring programs</li> <li>▲ NAIFA Coach and NAIFA Mentor Center</li> </ul>
Education and professional development programs tailored to your career stage	<ul style="list-style-type: none"> <li>▲ NAIFA’s Professional Development System (PDS)</li> <li>▲ NAIFA Professional Programs:               <ul style="list-style-type: none"> <li>■ Life Insurance &amp; Annuities Series ■ Health Services &amp; Employee Benefits Series ■ Multi-Line Series ■ Financial Advising &amp; Investments Series ■ Practice Management Series</li> </ul> </li> <li>▲ NAIFA’s Career Conference &amp; Annual Meeting</li> <li>▲ Programs-in-a-Box and other continuing education credit programs offered through your state and local associations</li> <li>▲ NAIFA prospecting, marketing &amp; sales system</li> </ul>
Enhanced leadership skills	<ul style="list-style-type: none"> <li>▲ NAIFA’s Leadership in Life Institute (LII)</li> <li>▲ Volunteer opportunities with NAIFA</li> <li>▲ NAIFA’s Online Leaders Training Center</li> </ul>
Increased client trust & respect	<ul style="list-style-type: none"> <li>▲ NAIFA’s Code of Ethics, which connotes a certain performance standard that is reassuring to clients</li> </ul>
Industry recognition	<ul style="list-style-type: none"> <li>▲ NAIFA’s Industry Awards Program</li> </ul>
Discounts on programs leading to industry designations	<ul style="list-style-type: none"> <li>▲ NAIFA’s alliances with The American College, AHIP and including the American Institute for CPCU, enables members to earn multiple professional designations:               <ul style="list-style-type: none"> <li>■ LUTCF ■ CFP™ ■ FSS ■ CPCU ■ CLU© ■ RHU ■ ChFC ■ LTCP</li> </ul> </li> </ul>
<b>PRACTICE RESOURCES</b>	
Sales tips and industry news	<ul style="list-style-type: none"> <li>▲ YAT Chat</li> <li>▲ NAIFA’s <i>Advisor Today</i></li> <li>▲ NAIFA’s Career Conference &amp; Annual Meeting</li> <li>▲ NAIFA Podcasts</li> <li>▲ NAIFA Connections</li> <li>▲ NAIFA’s Speakers Online Library</li> </ul>
Tools to build your business	<ul style="list-style-type: none"> <li>▲ NAIFA Virtual Library</li> <li>▲ NAIFA Sales, Prospecting, and Marketing Tools</li> <li>▲ NAIFA Communications Corner</li> </ul>
Reduced expenses	<ul style="list-style-type: none"> <li>▲ Discounted products and services through NAIFA Preferred Providers programs:               <ul style="list-style-type: none"> <li>■ Insurance programs ■ Business/management tools ■ Client management tools ■ NAIFA Bookstore ■ Sales tools ■ Office supplies &amp; equipment ■ Credit card program</li> <li>■ Shipping services ■ Car rental services ■ Wardrobe discounts and more!</li> </ul> </li> </ul>
<b>ADVOCACY</b>	
Opportunities for involvement	<ul style="list-style-type: none"> <li>▲ Make a contribution to NAIFA’s IFAPAC at a lower rate through the YATPAC initiative if you are a first-time contributor</li> </ul>
Personal advocacy on Capitol Hill and in your own backyard	<ul style="list-style-type: none"> <li>▲ NAIFA’s Legislative Action Center</li> <li>▲ NAIFA’s Political Action and Involvement Committees</li> <li>▲ State and local NAIFA lobbying efforts</li> </ul>
Timely updates and grass-roots mobilization messages	<ul style="list-style-type: none"> <li>▲ <b>GovTalk:</b> NAIFA’s bi-weekly e-mail covering advocacy issues</li> <li>▲ <b>GovAlert:</b> tells members when to contact their legislators on issues of importance</li> <li>▲ <b>GovWeb:</b> a series of webinars to provide NAIFA members with timely legislative updates.</li> <li>▲ <b>GovWatch:</b> a summary of breaking legislative and regulatory news</li> <li>▲ <b>GovPod:</b> podcasts on important current advocacy issues</li> <li>▲ NAIFA’s Federal &amp; State Legislative Grid</li> </ul>