



### **Advocacy Task Force Report Summary**

The Advocacy Task Force, chaired by NAIFA Board Trustee Terry Headley of Omaha, Nebraska, met March 1-2.

The group outlined its recommended actions aimed at reasserting NAIFA's leadership position by leveraging its unique political involvement (APIC), political action (IFAPAC) and lobbying strengths. Those recommendations include:

- Strengthen APIC and IFAPAC by:
  - Rebuilding the APIC infrastructure to strengthen and deepen NAIFA's key contacts, particularly with members of congressional committees with oversight for issues that are critical to NAIFA members
  - Retaining a consultant to perform an audit of NAIFA's APIC and IFAPAC operations
  - Growing PAC participation
  - Increase the number of Senate and House coordinators
  
- Strengthen state advocacy by:
  - Cross-sharing information federation-wide about state legislative and regulatory developments through enhanced use of the NAIFA website, legislative grids and the Capwiz program
  - Developing best-practices for state days-on-the-hill
  
- Improve cooperation among financial services industry groups, when appropriate, to enhance lobbying strength and address a wider range of issues
- Charge the Policy Formation Subcommittee to be more proactive and forward thinking, and to meet more frequently
- Improve communication about NAIFA's advocacy program to increase awareness about NAIFA's activities and how they impact members and their clients

For more information, go to [www.naifa.org//21stcentury](http://www.naifa.org//21stcentury).