



21 UPDATE

CONNECTIONS THAT COUNT

Issue 3 | April 2008

NAIFA is pleased to announce the structure and roll-out of the NAIFA Professional Development System, brought to you by NAIFA 21, and designed to enhance your bottom line. This update will provide brief snapshots of our progress toward achieving the vision of NAIFA in the twenty-first century. The person with chief responsibility for NAIFA 21 implementation is the Deputy CEO, Susan B. Waters, EDM, CAE. Reach Dr. Waters at swaters@naifa.org or 703-770-8102.

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EDUCATION & SALES TRAINING: PROFESSIONAL DEVELOPMENT SYSTEM OUTLINED



Strategy/Tactic: The NAIFA Professional Development System has been designed and approved by the Member Benefits Committee and the Board of Trustees. The system has five components: NAIFA Professional Programs, NAIFA Professional Practice Tools & Tips, NAIFA Preferred Providers, NAIFA Networks, and NAIFA Speaker Center.

Value/Benefit: The NAIFA Professional Development System has programs, tools and services to benefit NAIFA members at all career stages: early, established and accomplished. Many are offered as exclusive member benefits or feature special member rates.

When: Some aspects of the Professional Development System exist and others are being launched at dates specified in the overall design of the system, and that can be viewed at www.naifa.org/benefits/ProfDev/ProfDev_FINAL.pdf

For more information or to join the conversation, contact:

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EDUCATION & SALES TRAINING: PROFESSIONAL PROGRAMS OUTLINED

Strategy/Tactic: The professional programs will be organized into five practice areas: life insurance and annuities, health insurance & employee benefits, multi-line, financial advising and investments, and practice management. Leadership in Life Institute (LILI) and the LUTCF and FSS designations are integrated into the professional programs.

Value/Benefit: For the first time, NAIFA members will be able to access the NAIFA offerings according to practice specialty, and the programs will be differentiated accordingly.

When: The Life Insurance and Annuities Series, Health Insurance & Employee Benefits Series, Multi-Line Series, and Financial Advising & Investments Series will be launched in September 2008. The Practice Management Series will be launched in February 2009 along with the Prospecting, Marketing & Sales System.

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EDUCATION & SALES TRAINING: NEW PROGRAMS IN A BOX TO BE RELEASED

Strategy/Tactic: Associations will have at least three new Programs in a Box by the end of 2008. One will be an ethics course, one will focus on risk management, and the third will be on year-end tax planning.

Value/Benefit: These programs benefit local associations, generate opportunities for learning and networking by NAIFA members and are designed to be eligible for continuing education credit, which the local or state association can obtain.

When: The Programs in a Box will be released in May, August and November.

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EDUCATION & SALES TRAINING: PROFESSIONAL PRACTICE TOOLS & TIPS

Strategy/Tactic: Practice tools and tips are the benefits most frequently requested by NAIFA members. NAIFA is delivering these through *NAIFA's Advisor Today* articles, best practices toolkits, case studies and other marketing and sales presentations materials and business forms. These are either available today or are coming soon. Watch for announcements as each element is released.

Value/Benefit: NAIFA members are asking for practical tools and tips to increase productivity.

When: NAIFA Virtual Library will be launched in June as a benefit of membership, and the Virtual Assistant upgrade will be offered at a discounted price.

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EDUCATION & SALES TRAINING: PREFERRED PROVIDERS

Strategy/Tactic: NAIFA's preferred providers offer goods and services that enhance members' practices at prices better than are available elsewhere. They have been categorized for easy use. The categories are: business/management tools, client management tools, sales tools, insurance programs, office supplies, credit card program, shipping services and car rental services.

Value/Benefit: Using goods and services from only one or two of NAIFA's preferred providers can save much more than the annual investment cost of dues in the NAIFA federation.

When: Many preferred providers already exist. Three more will be added by spring 2009.

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EDUCATION & SALES TRAINING: NETWORKS AND SPEAKER CENTER

Strategy/Tactic: Social networking, mentoring and coaching are being tested for addition to NAIFA's offerings to members. So far, a group of YAT members has tested a NAIFA social network, and a group of LILI graduates will test it next. Industry experts will be tapped to create a speakers' video library.

Value/Benefit: Members in the early career stages express an interest in mentoring relationships, and those in established practices sometimes find that a coach can help them get to the next level of productivity. NAIFA members value networking very highly and want to supplement in-person meetings with other means of networking.

When: NAIFA Netsite, Neighborhood Network and ProCast will be piloted in November. The Mentor Center and coaching program will be available in 2009.

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