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NAIFA Local Association Best Practices Workbook

The purpose of the NAIFA Best Practices Workbook is to strengthen each local association’s capacity to deliver valued member services. It includes resources to give associations the tools they need to achieve membership success and excellence and earn recognition. The Best Practices tools are all built around these four focus areas for associations:

- Advocacy
- Membership
- Sales Training/Education and Professional Development
- Networking

This workbook has been provided to give association leaders an overview of the new and reorganized resources available to them.

Best Practices Summary of Annual Goals

The Jack E. Bobo Award of Excellence sets forth a variety of critical goals and benchmarks that every association should strive to achieve. A summary of these goals are listed. (See page ii)

Officer and Standing Committee Chair Responsibilities

Summary of job responsibilities association officers and standing committee chairs are included. These are the responsibilities of those leadership positions required by the 2012 local model bylaws. (See pages 14-45)

Association Model Calendar

The association model calendar provides an association with a model of its monthly responsibilities. Each association may take this model and incorporate its personalized association activities. It is also a good resource to plan your monthly activities and record notes. (See pages 46-93)

Resources/Appendix

Included are key resources and information about the NAIFA Online Service Center. Information on the Jack E. Bobo Award of Excellence online application, CapWiz, how to get a logo for your association, Parliamentary Procedures at a glance, Budget & Finances and industry acronyms can also be found here. (See pages 94-102)

Best Practices Summary of Annual Goals

From the Local Association Jack E. Bobo Award of Excellence

Statement of Purpose

The purpose of the Jack E. Bobo Award of Excellence is to:

1. Ensure the award is a guidepost for progress towards improving local & state associations in delivering at least minimum standards in all mission critical areas;
2. Reward those exceeding minimum standards in all primary areas defined in NAIFA in the 21st Century; and
3. Give special recognition to those associations that exceed those standards to a high degree (associations who can serve as models for others).

Advocacy

1. Stimulate and monitor legislative and regulatory grassroots activity.
2. Hold and actively promote either a local legislative day or a local legislative forum so members can attend and interact with state and/or federal legislators and their staff.
3. Report the names of new NAIFA member APIC contacts who have relationships with their federal legislators to apic@naifa.org. Provide an updated list of contacts to the state APIC chair and NAIFA. Have the contacts meet with their legislators at least three times per year.
IFAPAC

1. Form an IFAPAC fundraising Committee using the ratio of one committee member for every 15 NAIFA members.
2. Increase your local association’s IFAPAC contributions and contributors (through Annual and Monthly Bank Draft payments) from the prior year by at least 5%.
3. Send at least three written solicitations to your members dedicated to IFAPAC that include requests to complete directives.
4. Obtain Century Club level or above contributions from all members of the Board of Directors.
5. Hold at least one fundraising event to raise money for IFAPAC.
6. Achieve a minimum participation of 35%

Membership

1. Achieve membership growth during the membership year.
2. Attain 85% renewal retention.
3. Create a Membership Plan.
4. Give membership presentations at a venue that has non-members in attendance. Collect prospect contact information so that your membership team can follow up after the presentation.
5. Hold a new member orientation.

Sales Training/Education and Professional Development

1. Provide programs of interest for members so that they will attend local meetings, in the areas of Life & Annuities (L&A), Health & Employee Benefits (H&EB), Multiline (ML), Financial Advising & Investments (FA&I), and a Legislative Day plus sales, prospecting, marketing or practice development topics.
2. Provide a venue outside of regularly scheduled meetings to increase networking opportunities for your members (Ex. YAT networking event, study groups, online communication venue, mentoring program).
3. Get your city/town to proclaim September “Life Insurance Awareness Month.”
4. Establish and support programs such as the Leadership in Life Institute (LILI) and the Young Advisors Team (YAT).
5. Provide members with sufficient meeting content to meet the state’s minimum CE requirements.

Governance

1. Current bylaws have been approved and have been filed with the State and National Association within the last two years.
2. Conduct planning sessions with your leadership teams (separate from board meetings) throughout the year.
3. Develop an annual action plan and revisit the action items during each board meeting to monitor your progress and hold your team accountable.
4. Promote the Managers Membership and NAIFA Quality Award, and designations.
5. Provide recognition for long time members, those receiving the Managers Membership and NAIFA Quality Award, and any new designations.
6. Educate current and prospective members about available benefits and sales training.
7. Survey members for feedback on meetings, programs, etc.
8. Ensure that all association leaders attend the State Association Leadership Conference or any other training provided by the state.
9. Encourage all association leaders to graduate from the NAIFA Online Leadership Academy

* This page cannot be used as your documentation for your association’s annual action plan when applying for the Jack E. Bobo Award of Excellence.
NAIFA LOCAL MEETING FORMAT TEMPLATE

RESOURCES

Member meetings are considered a primary benefit since they include bottom line benefits, such as sales ideas and CE credit, advocacy and industry updates, as well as networking and inspiration. They may be held monthly, bimonthly, or quarterly. The quality of member meetings greatly influences membership retention.

NAIFA provides its members with creative sales and marketing ideas, networking opportunities, first-rate sales and skills training, and superior political advocacy. In short, NAIFA’s business is to help members grow their businesses. Just as you connect your clients to the services they need, NAIFA connects you to the resources you need to be successful.

ITEMS TO REMEMBER

- Identify the Best Moderator
- Plan and Promote: See How to Hold a Successful Meeting Handbook
- Engage YATs: YAT Playbook has meeting suggestions
- Schedule speakers for each initiative as early as possible (at least within the prior month)
- Highlight Initiatives
  - March - YAT Awareness Month and National Membership Month
  - Spring - Deadline for NAIFA Quality Award Program
  - May - Disability Insurance Awareness Month / Recognize all IFAPAC and APIC contributors
  - June - End of the Membership Year / Promote Leadership in LIFE Institute (LILI)
  - July - Deadline for Conference Registrations
  - August - Begin to publicize Life Insurance Awareness Month
  - September - Life Insurance Awareness Month
  - October - Monthly Credit Card Program
  - November - Long-Term Care Awareness Month
  - December - Deadline for IFAPAC contributions
1. Pledge of Allegiance  [2 MINUTES]

2. Prayer (Optional)  [2 MINUTES] Public Prayer in a Diverse Society

3. Recognize New Members and Guests  [5 MINUTES]

4. Local Reports on Core Committees Such as YAT, Membership & Government Relations  [5 MINUTES]
   If all governance items are handled within the Board meetings, this item would be removed

5. Advocacy Report
   Cover timely and relevant legislative and regulatory issues so members are informed of issues impacting their bottom-line  [10-15 MINUTES]

   NAIFA National Advocacy Report Resources  [www.naifa.org/advocacy]
   - NAIFA’s Annual Advocacy Brief
   - GovTalk: Is emailed monthly and contains a summary of federal and state legislative matters that impact the business of NAIFA members
   - GovUpdate: Reports on breaking legislative and regulatory matters that potentially affect your bottom line
   - GovAlert: Lets you know that urgent NAIFA member action is needed on legislative or regulatory issues that affect you

   - Discuss local and/or state advocacy issues
   - NAIFA is your voice on Capitol Hill and in your own backyard, fighting for a positive legislative and regulatory environment for insurance and financial professionals

6. Highlight a Local/State and 2 or 3 NAIFA National Member Benefits
   Distribute flyers, NAIFA Member Benefits Guide, and use member testimonials  [5 MINUTES]

   - Illustrate how NAIFA helps you “Grow Your Business” by highlighting a professional development/education offering or practice resource. NAIFA’s Member Benefits Briefs are also available.

   - NAIFA membership offers you instant access to a vast array of member benefits designed to enhance your knowledge and skills and provide value-added business services, abundant networking and mentoring opportunities, when, where, and how you want them, at every stage in your career.
7. Series of Sales Ideas
   1 to 2 sales ideas per practice specialty that are transferable and could be implemented the following day. Sales ideas aligned with the practice specialties assure that there is a take-away value to every Association meeting. **5 MINUTES**

   **NAIFA National Sales Ideas Resources**
   - NAIFA’s Sales and Marketing Resources
   - *Advisor Today* Sales Ideas
   - Sales ideas provided by the official NAIFA publication, *Advisor Today*

   • As a NAIFA member you have access to unique sales, prospecting, and marketing tools designed to help you succeed.

8. Member Round Table Discussion
   A moderator should be chosen for each table. To facilitate networking, encourage members to sit with other members that they may not know. Members interact, build camaraderie and network. The Round Table Discussion would be centered around a topic/subject of the day, with each individual sharing (i.e.: their preferred referral system, a selected practice management tip, a marketing concept, a favorite NAIFA Member Benefit). It is this kind of sharing that solidifies relationships, builds rapport, and connects the individual member to NAIFA. **10 MINUTES**

9. Keynote Speaker for the Meeting Program
   A high-quality professional development learning opportunity or motivational/inspirational speaker. Plan to include varied speaker topics throughout the year so that at least one meeting per year is relevant for those in the following practice specialties. Continuing education opportunities are what our current NAIFA members and potential members have told us repeatedly what they want, need, and expect from their local association experience. Consult monthly initiatives when booking speakers. **50 MINUTES**

   **NAIFA Provides Content for Meetings Through Several Ongoing Programs**
   - NAIFA Programs in a Box
   - NAIFA provides content for meetings through several ongoing programs
   - Professional Liability Loss Control Seminar

   • As a NAIFA member you can tap into NAIFA’s talent pool of industry experts at NAIFA local and state meetings and the NAIFA Career Conference and Annual Meeting.

10. “Make the Membership Ask”
    Ask the attendees to help their local grow by recruiting a new member. Remind them to renew their own membership. Distribute prospect kits available through the NAIFA Marketplace to non-member attendees and to members for distribution to their non-member peers. **2 MINUTES**

11. Networking Event at the Conclusion
    Complements the internal networking opportunity created through the Round Table Discussions. Ideas include a wine and cheese “Meet and Greet” with Invitations extended to Members of the Business Community (Chamber of Commerce or NFIB), State Legislative Representatives and/or State Regulators, or Partner Professionals (such as Attorneys, CPAs, Trust Officers, Mortgage Bankers, etc.) **1.5 HOURS TOTAL**
### 6-Step Planning Process

The purpose of the six-step planning process is to help your team apply the planning process to one goal or objective (project-specific) that they have chosen. The six-step planning process is for specific projects and will help guide you. Refer to the six-step planning process worksheet below and identify one goal or objective the team would like to focus on.

#### Step 1: What Is Your Goal or Objective?
- What is it that your local association wants to accomplish?
- How will you know when you are successful?
- What type of results does your team hope to see?

#### Step 2: Right People
- First get the right people on your team.
- Then get them in the right positions.
- The right people are your most important asset.

#### Step 3: What is Your Strategy?
- What steps will your team take to implement the plan?
- Have committee meetings to discuss how we are going to accomplish the goal(s).
- Everybody has ideas and they must be heard.
- Determine the best strategies and move to the next step in the planning process.

#### Step 4: Define Team Roles
- Determine what the role for each team member is going to be.
- Go with their strengths. Does someone specialize in marketing, writing, talking in front of people, etc.?

#### Step 5: Who Does What by When?
- Write your action plan and stick with it.
- Make sure everyone knows their responsibilities/roles within the team.
- When do action items need to be accomplished by?

#### Step 6: Accountability
- Who is responsible for holding the team accountable?
- How will you hold the team accountable?
- When will you hold the team accountable?
2015-2016 Local Success Planning
Action Plan Template

Visit the session on “Action Planning” within The Academy for planning strategies and ideas.

Date: ____________________________________________

Association Name: ____________________________________________

<table>
<thead>
<tr>
<th>What Your Association Wants to Accomplish</th>
<th>Recruiting the Right People</th>
<th>Determine the Role of Each Team Member</th>
<th>Steps to Implement</th>
<th>Who Does What by When</th>
<th>Who, How and When</th>
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<td>2. Hold and actively promote a local legislative day or forum, so members can attend and interact with state and/or federal legislators and their staff.</td>
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<td>3. Report the names of new NAIFA member APIC contacts who have relationships with their federal legislators to <a href="mailto:apic@naifa.org">apic@naifa.org</a>. Provide an updated list of your local’s contacts to the state APIC chair and APIC at NAIFA-National. Have the contacts meet with their legislators at least three times during the year.</td>
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<td>4. Encourage members to attend NAIFA’s Congressional Conference in May.</td>
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<td><strong>IFAPAC</strong></td>
<td>* Begin IFAPAC Planning in November to prepare for the start of the PAC year in January.*</td>
<td>1. Form an IFAPAC Fundraising Committee using the ratio of one committee member for every 15 NAIFA members.</td>
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<td>2. Increase your local association’s IFAPAC contributions &amp; contributors (Annual and Monthly Bank Draft) from the prior year by at least 5%.</td>
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<td>2. <strong>% Increase</strong></td>
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<td>3. Send at least three written solicitations to your members dedicated to IFAPAC that include requests to complete Directives.</td>
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<td>4. Obtain Century Club level or above contributions from all committee chairs &amp; members of the Board of Directors.</td>
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<td>4. <strong>%</strong> of Board contributing at Century level</td>
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<td>5. Hold at least one fundraising event to raise money for IFAPAC.</td>
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<td>6. Budget for &amp; mail in $3 per capita administrative contribution request.</td>
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<td>7. Achieve a minimum participation rate of 35%</td>
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<td>1. Create a membership team to engage new members and assist in membership retention.</td>
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<td>2. Create a Membership Plan.</td>
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<td>3. Give membership presentations at an event that has non-members in attendance.</td>
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<td>4. Collect prospect contact information and create a hot prospect list.</td>
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<td>5. Attain 85% retention rate.</td>
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<td>6. Call your lapsed members and those in their renewal cycle. Encourage participation in the Monthly Payment Program. Track your results in NAIFA’s MemberNet.</td>
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<td>7. Achieve membership growth during the membership year.</td>
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<td>9. Hold a new member orientation.</td>
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<td>10. Implement initiatives to engage and welcome members, such as the New Member Engagement Program and the New Member Orientation Program.</td>
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<td>11. Participate in educational opportunities at the National, state, and local association levels; i.e. conference calls, leadership training, The NAIFA Online Leadership Academy, etc.</td>
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<td><strong>SALES TRAINING/EDUCATION AND PROFESSIONAL DEVELOPMENT</strong></td>
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<td>1. Provide programs of interest for members so that they will attend local meetings, in the areas of Life &amp; Annuities (L&amp;A), Health &amp; Employee Benefits (H&amp;EB), Multiline (ML), Financial Advising &amp; Investments (FA&amp;I), a Legislative Day plus sales, prospecting, marketing or practice development topics.</td>
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<td>2. Provide a venue outside of regularly scheduled meetings to increase networking opportunities for your members? (e.g. YAT networking event, study groups, online communication venue, mentoring program).</td>
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<td>3. Get your city/town to proclaim September “Life Insurance Awareness Month”.</td>
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<td>4. Establish and support programs such as the Leadership in Life Institute (LILI), Advisor 2020 Workshops, the NAIFA LUTCF Designation Program, and the Young Advisors Team (YAT).</td>
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<td>1. Current <em>bylaws</em> have been approved and have been filed with the State and National Association within the last two years.</td>
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<td>2. Conduct planning sessions with your leadership teams (separate from board meetings) throughout the year.</td>
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<td>3. Develop an annual action plan and revisit the action items during each board meeting to monitor your progress and hold your team accountable.</td>
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<td>4. Promote the Managers Membership and NAIFA Quality Award, and designations.</td>
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<td>5. Provide recognition for long time members, those receiving the Managers Membership and NAIFA Quality Award, NAIFA Leadership in Life Institute (LILI) graduates, and those receiving any new designations.</td>
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<td>6. Educate current and prospective members about available benefits and sales training.</td>
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<td>7. Survey members for feedback on meetings, programs, etc.</td>
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<td>8. Ensure that all association leaders attend the State Association Leadership Conference, or any other training provided by the state.</td>
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<td>9. Locate your association’s federal tax ID number.</td>
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<td>10. Develop your annual association budget.</td>
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<td>11. File your 990 or annual notice with the IRS.</td>
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<td>12. Encourage association leaders to participate and graduate from the NAIFA Online Leadership Academy</td>
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President

The president has overall responsibility for the association’s success by building a team of leaders to accomplish its immediate and long-term goals. By working closely with your Executive Committee, including the national committeeperson, association staff and president-elect, you will ensure a strong future and continuity for your association.

Formulating Goals

Organize a planning session with your board, committee chairs and executive to discuss strategies for your year in office:

- Encourage your leadership team to graduate from the NAIFA National Online Leadership Academy and utilize the action planning session resources.
- Evaluate last year’s programs. Decide which programs worked well and which programs need to be improved. Utilize association programming to drive, maintain and grow membership. This should include YAT (Young Advisor Team) programs and events.
- Assess your association’s resources in terms of money and member involvement and prioritize your goals.
- Work closely with your membership chair to ensure that the membership committee has developed a written Membership Plan that includes the information who, what, and when.
- Write an annual action plan that determines who will do what by when and establishes monthly review and accountability methods. Samples action plan templates are available in the NAIFA National Online Leadership Academy.
- Ask all board members to sign off on the plan and support it.
- Meet with APIC & IFAPAC Chairs to set fundraising & grassroots goals
- Budget for the Association’s $3 per capita administrative fee to IFAPAC

Building a Team

Strong leadership, vision and management are necessary for the smooth operation and forward motion the association must have in order to serve the membership and to survive. As the association’s leader, you need to project your excitement about the association and its goals to motivate and mobilize your leadership team. Work together with your association executive who brings experience and continuity to your association. Be sure the executive has a clear job description so that everyone’s expectations are met.

Delegation is your key to success. The more members you involve in leadership, the more you will be able to accomplish. Mentor the future leaders of your association.

Assign your strongest leaders to serve on the standing committees of Government Relations, Health, Professional Development & Programs, and Membership. You may also appoint special committees or task forces to perform various functions not specifically provided for in the bylaws. You may want to consult with your president-elect and discuss naming certain individuals for a two-year term as chair. Consider appointing a co-chair to become chair the following year. This is an excellent way to orient future leaders, especially for the membership chair position. Remember, not all members are prepared to hold a “full-time” leadership position. Introduce them to NAIFA leadership through micro-volunteerism, allowing them to choose their level of involvement by giving them easy low commitment ‘bite size’ actions to ease them into their volunteer roles. You will find that this approach builds your volunteer base and helps identify individual strengths.

It is helpful to conduct a board and committee chair orientation session at or before the first board meeting. Explain clearly to committee chairs your objectives for the year, their responsibilities and the resources available to them. Follow up with committee chairs regarding their responsibilities regularly. Monitor their progress relative to your strategic plan and hold them accountable. Provide encouragement, recognition and assistance as needed.

Managing the Association

Submit officer and committee chair reporting, which is accessed via the NAIFA Online Service Center. Failure to report this information in a timely manner may result in your association forfeiting voting privileges at the NAIFA Career Conference and Annual Meeting.

While the secretary is responsible for the minutes of the meetings, it is up to you to follow up with the secretary to ensure that the minutes are taken, prepared and distributed to the board immediately following each meeting. Meeting minutes are legal documents and should be taken and maintained with care. It is also your responsibility to ensure that items taken up by the board are put into action by your leadership team.

Make certain the association’s bylaws are up-to-date, and that the association operates with sound business practices. See the Governance section located in the Association Leaders & Staff Resources section of NAIFA’s website and the Keep It Legal Handbook for recommendations.

Look at creating benefits for newer agents and/or members under 40. Consider appointing a YAT chair for programming, advocacy and renewing programs.
**Representing Your Association**

As president, you may be asked to speak on behalf of the association to the media and the community. You need to be aware of the broad industry issues as well as state and NAIFA positions and be able to articulate them for those who may not understand the insurance and financial services industry. Contact your state office or the national office for specific information regarding legislation or visit the NAIFA website at [www.naifa.org/advocacy/legislative](http://www.naifa.org/advocacy/legislative). Frame your public statements and association communications carefully. Remember, you are NAIFA to the members and to the public.

As president, you are one of the two official representatives of your association who have voting rights in NAIFA's National Council. The other is the national committeeperson. The National Council meets once a year at the NAIFA conference to conduct the business of the association. You are expected to attend and vote. If you cannot attend, you should select a replacement to represent your association on your behalf at the meeting. Prior to the conference, you must notify NAIFA of the names of the delegates from your association who will be attending the conference. Be sure your association adheres to the NAIFA reporting date deadlines because failure to do so may forfeit voting rights for your association.

**Every Month**

- Conduct board or executive committee meeting.
- Follow up with committee chairs regarding their responsibilities.
- Preside over general membership meeting.
- Announce any upcoming deadlines.
- Check finances.
- Discuss membership drive.
- Monitor annual action plan progress.
- Review your primary focus areas.
- Check association model calendar.
- Check progress toward IFAPAC Goal
- Provide opportunities for IFAPAC solicitation.

**March-June 2015 (Prepare for Office)**

- Register for and attend the NAIFA Congressional Conference (May 2015)
- Graduate from the NAIFA National Online Leadership Academy
- Meet with the current president to discuss the challenges ahead.
- Identify your leadership team for your year as president. Appoint all committee chairs.
- Set your goals for the coming year. Hold an annual planning meeting. Write down your plans for the year, along with the parties responsible for each area — Who will do what by when?
- Read your bylaws.
- Meet with each committee chair to review goals and objectives for the year. Work with the membership chair to adopt a membership goal and create a Membership Plan.
- Work with the new IFAPAC Chair to help facilitate the formation of a Fundraising Committee
- Work with the IFAPAC Chair to ensure IFAPAC fundraising is on track to meet current year goals.
- Set date and prepare for Board and Committee Orientation meeting.
- Attend state presidents-elect training and Association Leadership Conference. It is essential that your entire team attends.
- Meet with the association executive to discuss how you will work together to achieve 100% participation from your association's Board and Committee Chairs.

**June**

- Conduct Board and Committee Orientation. Ask each committee chair and officer to come to this meeting with objectives and financial needs in writing.
- Working with the treasurer and other board members, develop a budget. Present the budget to the board and adopt it by July 15.
- Ask membership chair to submit Membership Plan.
July

- Obtain required audit and “end-of-year” statement. Have auditor prepare IRS Form 990 or 990-EZ.
- Determine NAIFA conference representation and ensure proper reservations have been made.
- Make arrangements for association executive to attend the NAIFA Career Conference and Annual Meeting featuring an Executive track.
- Ask all board members to sign off and support association membership plan.
- Ask the leadership team to contribute to IFAPAC at the Century Club level or above.

July Deadlines

- **July 8:** Applications for Jack E. Bobo Award of Excellence for associations due online or postmarked to NAIFA.
- **July 8:** Early Registration deadline for NAIFA Career Conference and Annual Meeting.
- **July 15:** Budget for new fiscal year must be adopted.
- **July 31:** Association Dues Update due to NAIFA (including dues amount and deductible).
- **35 days prior to the first session of the National Council at the NAIFA Career Conference and Annual Meeting:** Local officers and committee chairs must be reported to keep association voting privileges.
- **Plan for September:** Life Insurance Awareness Month.
- **Track goals for IFAPAC.** (Your local should be halfway to your fundraising goals)

August

- **Ensure that professional development & programs chair has created a schedule for local meetings for the year.**
- **Submit your association's budget, annual action plan and membership plan in to state office (for local associations) or the national office (for state associations).**
- **Confirm plans of association representatives and national committeeperson to attend the NAIFA Career Conference and Annual Meeting in September.**
- **Budget for and remit $3 per capita administrative contribution to IFAPAC.**
- **Make your own, personal annual contribution to IFAPAC (if you're not on monthly bank draft).**

August Deadlines

- **August 4:** Advance registration deadline for NAIFA Career Conference and Annual Meeting.
- **15 days prior to the first session of the National Council at the NAIFA Career Conference and Annual Meeting:** Local NAIFA delegate and alternate reporting deadline.

September (Life Insurance Awareness Month)

- **Prepare one local association meeting in honor of Life Insurance Awareness Month.**
- **Review progress toward IFAPAC goals.** (You should have achieved 75% of your goals.)
- **Plan for November:** Long-Term Care Awareness Month.

October

- **Attend the NAIFA Career Conference and Annual Meeting.**
- **Plan for mid-year state association meeting, sales congress, etc.**
- **Hold health-related association meeting.**
- **Ensure that the recommended $3 per capita administrative contribution is mailed to the IFAPAC Office at NAIFA-National.**
- **Hold a Membership event.**
- **Plan for November:** Long-Term Care Insurance Awareness Month.
- **Contact your IFAPAC chair about year-end fundraising push.**

November (Long-Term Care Awareness Month)

- **Report on the NAIFA conference.**
- **Prepare one local association meeting in honor of Long-Term Care Awareness Month.**
- **Work with president-elect to begin selecting next year’s leadership team.**
- **Review progress toward IFAPAC goals and leadership participation for purposes of the Bobo and IFAPAC awards.** (Remember: the IFAPAC criteria for the Bobo Award is measured by calendar year.)
November Deadlines

- **November 15**: IRS Form 990 due for those associations required to file it. Go to www.irs.gov for more information.

December

- Appoint an LUTC and an IFAPAC chair (in consultation with president-elect).

December Deadlines

- **December 30**: IFAPAC donations due to NAIFA. Please note that donations must be at NAIFA Headquarters on December 30. Any donations received at headquarters after that date will be processed for the next year.

January

- State president: Appoint state LILI chair and nominate a moderator (9-12 months prior to anticipated start of institute).
- Notify NAIFA of new IFAPAC chair.
- Report 2016 fundraising goals to local leaders and board.
- Notify LUTC of LUTC chair for following association year.
- Promote attendance at NAIFA’s Congressional Conference.

February

- Review bylaw requirements and appoint Governance Committee.
- Encourage president-elect to consider appointments for next year’s leadership team.
- Plan association annual meeting to be held in April, May or June. Send required written correspondence regarding meeting.

March (YAT Awareness Month)

- Review with the membership chair any plans for a final year-end push.
- Announce date and place for State Association Leadership Conference and state conference. Every incoming officer and committee chair should attend.
- Utilize resources in the Academy for leadership training and action planning.
- Together with president-elect, determine representation at Association Leadership Conference and state conference. (Include IFAPAC training at ALC for all leaders.)
- Promote attendance at NAIFA’s Congressional Conference

April

- Finalize plans for final association board meeting.
- Plan for May: Disability Insurance Awareness Month.
- Graduate from the NAIFA National Online Leadership Academy.

April Deadlines

- **Mid-May**: NAIFA Quality Award. NAIFA Quality Award deadline. NOTE: ALL applicants must be members of NAIFA in good standing.

May (Disability Insurance Awareness Month)

- Promote attendance at the Association Leadership Conference and state conference (if applicable).
- Attend Congressional Conference

June

- Conduct last board meeting. (Both new and old members of the Board should attend.)
- Review final membership report and plan one last membership push.
- Receive final committee reports.
- Give a brief review of the year’s activities.
- Report on financial situation and schedule audit.
- Install new officers. Pass gavel to the new president.
- Discuss the state association conference.

June Deadlines

- **June 30**: Officer and committee chair reporting due
- Membership applications due postmarked to NAIFA for annual membership awards and official membership totals.
President-Elect

You have begun a two-year commitment to effective leadership of your association. Make the most of your year as president-elect to prepare for your year as president. The leadership you provide will result in a stronger and more enthusiastic association.

Apart from outlining the goals and expectations for your administrative year, special duties involve reviewing the association’s bylaws, policy manuals and budgets, as well as evaluating current association activities. Your association’s policy or tradition may also assign you the responsibilities of membership or program coordination. In addition, you will:

• Preside over membership meetings in the absence of the president.
• Conduct board meetings in the absence of the president.
• Hear committee reports.

Evaluating Current Activities

Take the opportunity to become familiar with the association’s past activities and current programs and policies in order to lead the association effectively in the future and maximize programming to drive, maintain and grow membership.

List all the officers and committees of the association and then ask what activities each leader undertook that actually benefited members this year. Then evaluate if the person responsible performed adequately and if finances were sufficient.

Compare the budget and actual expenditures of each activity. Whether an activity is above or below budget will influence the budget you develop for your presidential year.

Carefully evaluate the people in charge of these activities. Determine whether they met their goals. If they didn’t, was it because of lack of leadership, members’ participation or money? What you uncover will help you determine who are the capable and dependable members worthy of future committee appointments.

Preparing for Leadership

When planning your future activities as president, or when you require information, evaluation or technical data, consult appropriate chairs or contact the staff of your state association and NAIFAs Association Services Department.

Review state and national association resources available to Association Leaders and Staff on the NAIFA website, Jack E. Bobo Award of Excellence online application, NAIFA Online Service Center, MemberNet and other current data.

Plan to begin appointing your leadership team as early as January. Be careful to appoint the right people on your “bus” so that your team will have a great opportunity to work together to accomplish your association goals. Complete the appointments no later than March so that you can hold a planning meeting with them in June and ensure that they plan to attend the Association Leadership Conference. This is your opportunity to have your entire team trained together without your having to go it alone.

Consult with your incoming president-elect and discuss naming certain individuals for a two-year term as chair. Consider appointing a co-chair to become chair the following year. This is an excellent way to orient future leaders, especially for the membership chair position.

Make certain the association’s bylaws are up-to-date. Consult the NAIFA model bylaws to ensure that your association’s bylaws contain the mandatory provisions necessary to be in agreement with NAIFA Federation requirements, and that they are in line with any recent changes made by the National Council.

Finally, carefully review the president’s commitments, and be prepared to assist the president and to step in as needed.
Every Month

- Attend board or executive committee meeting.
- Review president’s monthly commitments. Support and be prepared perform duties in the president’s absence.
- Support all committee activities.
- Help publicize all activities of the association.
- Help the association meet all deadlines.

April–May (Prepare for Office)

- Graduate from the NAIFA National Online Leadership Academy
- Meet with the incoming president to define any special responsibilities you may be delegated.
- Attend State Association Leadership Conference.
- Attend Congressional Conference (May 19-20, 2015).
- Meet with IFAPAC Chair and go over 2015 fundraising plans.

June

- Assist president with the Board and Committee Orientation meeting.
- Participate in the development of a budget to be presented to the board by July 15.

July

- Make reservations for NAIFA Career Conference and Annual Meeting.
- Review progress towards IFAPAC goals. Your association should be at 50% of goal.

July Deadlines

- **August 4**: Application for Jack E. Bobo Award of Excellence for associations due online or postmarked to NAIFA.
- **July 15**: Budget for new fiscal year should be adopted.
- **July 31**: Association Dues Update due to NAIFA (including dues amount and deductible)
- 35 days prior to the first session of the National Council at the NAIFA Career Conference and Annual Meeting: Local officers and committee chairs must be reported to keep association voting privileges

August

- Confirm plans have been completed for association representatives to attend NAIFA Career Conference and Annual Meeting in September.
- Make your annual contribution to IFAPAC (if you’re not already on monthly bank draft).

August Deadlines

- **August 4**: Advance registration deadline for NAIFA Career Conference and Annual Meeting.
- 15 days prior to the first session of the National Council at the NAIFA Career Conference and Annual Meeting: Local NAIFA delegate and alternate reporting deadline.

September (Life Insurance Awareness Month)

- Attend NAIFA conference or in the absence of the president, preside over member meeting and board meeting.
- Plan to attend Annual APIC/IFAPAC Planning Meeting.

October

- Plan for mid-year state association meeting, sales congress, etc.

November (Long-Term Care Awareness Month)

- Evaluate current year’s activities thus far and start thinking about what you want to keep the same and what you want to do differently.
- Begin reviewing and selecting candidates for next year's leadership team, especially IFAPAC and membership chairs.
- Attend Annual APIC/IFAPAC Planning Meeting.

November Deadlines

- **November 15**: IRS Form 990 due for those associations required to file it. Go to www.irs.gov/ for more information.
Responsibilities — President–Elect

December

- Appoint an LUTC chair and an IFAPAC chair (in consultation with president) for the coming year. The IFAPAC year runs from January-December, and The American College will ask in January who the LUTC chair is for the coming association year.

December Deadlines

**December 30:** IFAPAC contributions due to NAIFA from board members. Please note that donations must be at NAIFA Headquarters on December 30: Any donations received at headquarters after that date will be processed for the next year.

January

- Conduct a membership survey regarding benefits and services offered to members in preparation for action planning in March via the National Online Leadership Academy.
- State president-elect: Plan Association Leadership Conference.
- Announce deadline dates for NAIFA Quality Award, and MDRT.
- Notify The American College of LUTC chair or chair for following association year.

February

- Appoint membership chair by **February 1**.
- Consider appointing a professional development and programs chair now. Have the newly appointed chair begin to review the responsibilities immediately and to start planning a meeting with the current chair to organize the committee’s structure.
- Prepare for action planning session to be held in April, May or June.
- Tabulate results of the membership survey for action planning session.
- Review bylaw requirements and encourage president to appoint Governance Committee.
- Attend statewide presidents elect meeting.
- Along with the president, assist with planning the annual association meeting. Send required written correspondence regarding meeting.

March (YAT Awareness Month)

- Continue work on selecting next year’s leadership team.
- Together with president, determine representation at Association Leadership Conference and state conference.
- Review and support membership chair plans for a final year-end push.
- Conduct action planning session. Invite current leadership team and any identified chairs for next association year.
- Announce date and place for State Association Leadership Conference and state conference. Every incoming officer and committee chair should attend and utilize resources in The Academy.
- Plan to attend NAIFA’s Congressional Conference.

April

- Promote attendance at the Association Leadership Conference and state conference.
- Finalize plans for final association board meeting.
- Graduate from the NAIFA National Online Leadership Academy.
- Promote attendance for Congressional Conference.
- **Mid-May:** NAIFA Quality Award deadline. NOTE: ALL applicants must be members of NAIFA in good standing.

May (Disability Insurance Awareness Month)

- Elect new officers.
- Attend NAIFA's Congressional Conference
June

- Complete committee chair appointments. **NOTE:** While your committee chairs will take office officially on July 1, it is critical that you have your team in place well in advance.

- Coordinate with secretary to report new officers and committee chairs. Remember failure to report officers in a timely manner will result in a loss of voting privileges at the NAIFA Career Conference and Annual Meeting.

- With the president, conduct last board meeting. (Both new and old members of the board should attend.)

- New officers installed.

- Discuss the state association annual meeting.

**June Deadlines**

▲ **June 30:** Officer and committee chair reporting due to state association office.

▲ **June 30:** Membership applications due postmarked to NAIFA for annual membership awards and official year-end totals.
Secretary/Treasurer

The secretary’s main objectives are to manage the association files, monitor member data and facilitate communication. The secretary and treasurer ensure that your association is operating with sound business practices. As association secretary, you are responsible for keeping the records of the association, submitting all official documents, collecting all funds, presenting a report at the association’s annual meeting and maintaining true copies of the bylaws and all amendments. As association treasurer, you are responsible for overseeing your association’s financial obligations and reporting to the board on financial matters. If your association has a paid association executive, the executive may carry out many of these responsibilities, if they are specified in the executive’s job description.

Managing the Association

Before taking office, meet with your association executive to discuss each of your responsibilities in the administration of the association. Determine who keeps mailing lists up-to-date, responds to association correspondence and mails association-meeting notices.

A successful association is operated as any successful business. A proper financial system, therefore, is a basic necessity. As treasurer, use a system that will work best for you. A simplified “cash basis” bookkeeping system is recommended for smaller associations, although accrual accounting is also appropriate.

You should mail a copy of your association’s budget and annual plan to your state association office annually and also ensure that they have a current copy of your bylaws.

Since members are critical to the success of local associations, membership administration is among a secretary’s most important responsibilities. As association administrator, you should maintain a stock of local membership applications. Become familiar with the “Membership Procedures Handbook,” which contains information on membership processing and reporting.

Regularly use the reports and other tools available to you, such as NAIFA National Online Service Center, to cross-check your local records with NAIFAs. Contact the Member Service Center at 1-866-TO-NAIFA to resolve any discrepancies.

Acting as Treasurer

Review the “Budgets and Finances for Associations” reference piece for additional information you need regarding financial issues. Also, be prepared to report on finances at all board meetings. If financial concerns arise at any time, alert the president immediately.

You are also responsible for ensuring that the local association budgets for and mails in its annual $3 per capita administrative contribution to IFAPAC at NAIFA-National.

Maintaining Records and Reporting Information

As secretary, you are responsible for taking board minutes. The purpose of minutes is to record the actions taken by the board. To keep minutes brief, record only the business transactions of meetings. Complex motions should be clearly formulated and recorded verbatim. Copies must be preserved for future reference and passed on to the new secretary immediately upon election.

You are responsible for completing the Local/State Association Dues Update online. You are also responsible for completing the request for bank information sheet. It is essential to provide updated contact information to NAIFA, including an email address and the dues deductibility worksheet.

The secretary must work closely with all committees that may have need of association records or help. Up-to-date records are essential for many of the committees.

The chairs of these committees rely upon the secretary for membership rosters and to record official business of the association.

To keep the membership well informed on association affairs, consider using NAIFA SmartBrief, news of general interest. Available from NAIFA headquarters, the publication is distributed weekly to associations electronically.

One of the secretary’s last duties in office is to work with the incoming president to report new local officers and committee chairs to the state association for the next association year. State associations report all state and local officers and committee chairs to NAIFA-National via the online officer & chair reporting website, available through the Online Service Center. The president-elect and the secretary must work closely on this joint responsibility—the president-elect by naming his or her committee chairs immediately upon election to president—the secretary by promptly reporting the officers and chairs.
Secretary Areas of Responsibility

- Maintain a complete paper filing system
- Take board minutes
- File bylaws
- Arrange the required segments of the business meetings of the association
- Monitor member data
- Collect and report funds
- Facilitate communication with NAIFA
- Respond to official information requests
- Become familiar with NAIFA Membership Procedures
- Produce and distribute newsletter

Treasurer Areas of Responsibility

(Depending on your association, some of these tasks may be assigned to the local executive. Make sure to coordinate appropriately.)

- Pay association bills
- Write and sign checks
- Maintain the financial records of the association
- Reconcile the association’s bank balance
- Report on the association’s finances
- Arrange for an annual audit or financial review
- Ensure appropriate IRS filings are made
- Make bond if needed
- Assist with the development of the association budget to present to the board for adoption by July 15
- Report annual dues to NAIFA–National

Critical Dates

- **July 8**: Association Award of Excellence due (postmarked)
- **July 31**: Association Dues Update due to NAIFA
- **December 30**: $3 per capita administrative contribution to IFAPAC due
- **December 22**: Final Bank draft for IFAPAC Contributions
- **December 30**: Last day IFAPAC Contributions can be submitted in order to count for the 2015 fundraising year
- **June 30**: Officer and committee chair reporting due to state association office
- **New member applications due (postmarked)** for annual official membership totals
National Committeeperson

The national committeeperson serves as the liaison between the local and state association and NAIFA-National. He or she reports on matters arising from and referred to the National Council, the Board of Trustees, and NAIFA standing committees to the state association. The national committeeperson is vital in the communications and management that binds the NAIFA Federation together. The position requires an experienced association leader who is willing and able to contribute time and effort to the association over a three-year term. As an experienced leader, the local national committeeperson is often called on to conduct the association new member orientation program and the strategic planning process.

Local National Committeepersons Responsibilities

- Primary liaison between the local and state association as well as NAIFA-National.
- Primary communications link between your local and state association and vice versa.
- Act as the ongoing continuity and stabilization within your local leadership board and executive committee.
- Senior advisor and consultant to your local board, executive committee, and especially, be a sounding board for your local president.
- Provide leadership in coordinating the short- and long-term goals and objectives of your local association (overall direction, and also, should play a major role in each administration’s strategic plan) – assuring the deliverables to be realized at fiscal year end are achieved.
- Serve as a voting delegate to the National Council, and have a working knowledge and understanding of the key issues and any proposed bylaws amendments that come before the National Council. In addition, be instrumental in appointing alternate delegates whenever any local associations within your state are unable to send voting delegates to the National Council.
- To be “talent scouts” within your local, in terms of recommending and nominating individuals from your respective local to the NAIFA-National Committee on Governance – these individuals will need to obtain the endorsement of your state association. Please use the National Committee Candidate Information Form located here. These recommendations are then provided to NAIFA’s Executive Committee to assist in identifying individuals to serve on NAIFA’s various National Committees.
- Provide a written or electronic report to the local membership following the NAIFA Career Conference and Annual Meeting in the association newsletter recapping the conference activities – and any amendments adopted to the NAIFA bylaws and other relevant developments arising out of the NAIFA Career Conference and Annual Meeting.
- Work directly with their state national committeeperson and membership chair to implement new member orientation.
- Work with GR, IFAPAC, and APIC chairs to promote NAIFA’s Advocacy Programs.

Providing Leadership Continuity and Strategic Planning

By serving a three-year term, you provide leadership and continuity to the association. This enables you to become familiar with the rhythm of the association as well as the sequence of important activities at the local, state, and national levels. Additional responsibilities include assuring that the membership campaign is active and promoting attendance at the NAIFA Career Conference and Annual Meeting. The national committeeperson is to assist the president-elect in completing all requirements of the Jack E. Bobo application and assure 100% attendance at your State Association Leadership Conference. Is also to establish a monthly review of your strategic plan and establish accountability methods.

Serving in the National Council

One of the primary duties of the national committeeperson is to represent the majority view of their membership in the NAIFA National Council and to represent NAIFA to their membership.

Fulfilling this responsibility involves attending the national conference, participating in the general sessions and state caucuses, representing the views of your association and voting accordingly. You should inform your newly elected president of his or her responsibility to attend the national conference, general sessions and state caucuses. You may assist in securing adequate funding through non-dues income sources to ensure that you and the president have the resources to attend the NAIFA Career Conference and Annual Meeting. State associations may help defray these expenses. NAIFA bylaws provide for appointing a member in good standing to represent the association in the National Council, should the president or national committeeperson be unable to attend. In the event that no one from the association can attend, an alternate appointed by the state may represent the association.
Representing NAIFA to the Members

The national committeeperson must stay current with the NAIFA activities and communicate information on current issues to the association members. The national committeeperson is to remain alert to all state and national communications, including the NAIFA SmartBrief email correspondences.

National committee persons must inform members of proposed changes in the NAIFA bylaws, candidates for office, conference promotion and other relevant news. They should also seek input from the board and members regarding proposed amendments and various NAIFA issues.

Every Month

- Monitor annual planning process.
- Attend board or executive committee meeting.
- Communicate news from state and national offices to your local association.
- Conduct new member orientation each month or as prescribed by your local.

July

- Register for NAIFA Career Conference and Annual Meeting.
- Officers and committee chairs MUST be reported 35 days prior to 1st session of National Council at the NAIFA Career Conference and Annual Meeting.
- Encourage president and other officers and members to attend NAIFA Career Conference and Annual Meeting.
- Review qualifications of officers and trustees running for NAIFA office. Solicit feedback from local membership.
- Report NAIFA Career Conference and Annual Meeting delegates to state a minimum of 30 days prior to conference.
- Assist in completion of Jack E. Bobo Award of Excellence online application by the July 8, 2015 deadline. (Refer to page 92 for more information).

August

- Continue to communicate NAIFA issues to general membership.
- Make final review of travel arrangements and lodging to the NAIFA Career Conference and Annual Meeting.
- Make your annual contribution to IFAPAC (if you're not on monthly bank draft).

September (Life Insurance Awareness Month)

- Attend general sessions and state caucuses at the NAIFA Career Conference and Annual Meeting.
- Report back to local outcome of NAIFA elections and any bylaw or amendments enacted. This must be a written report.

October–December

- Assist program chair in seeking qualified speakers for local luncheons.
- Assist IFAPAC chair in the year-end fundraising push for IFAPAC contributions.
- Monitor gathering of supporting materials for Jack E. Bobo Award of Excellence online application. (See page 92)
- At year-end meeting provide “year in review” for NAIFA issues.
- Help conduct new member orientation program.
- Assist with local association awards event.
- Contact state national committeeperson to discuss potential candidates for national committees and the NAIFA Board of Trustees.
- State National committeeperson recommend potential candidates for national committees and the NAIFA Board of Trustees to the National Governance Committee.

January–March 2016

- Assist membership chair in meeting membership benchmark percentages.
- Assist president-elect in preparing for Board and Committee Orientation Meeting.
- Assist membership chair in reaching membership goal.
- Assist in planning Leadership Development program.
- Promote state conference attendance.
- Encourage president to start Officer and Committee member selection process for next year.
- Promote attendance at NAIFA’s Congressional Conference.
April

- Graduate from the NAIFA National Online Leadership Academy.
- Start promoting state annual meeting.
- Promote Association Leadership Conference and encourage attendance by all members.
- Assist in securing adequate funding to attend NAIFA Career Conference and Annual Meeting (non dues revenue).
- Monitor presentation of nominees for local office at this general membership meeting.

May (Disability Insurance Awareness Month)

- Continue to promote Association Leadership Conference and state conference.
- Work with local exec in gathering names, addresses, etc. of new officers and committee members for submission to state and national.
- Assist in completing the Jack E. Bobo Award of Excellence online application for submission to NAIFA-National.
- Contact state national committeeperson for feedback on recommended changes to local bylaws.
- Contact state national committeeperson for upcoming issues at NAIFA Conference and if any individual is running for NAIFA Trustee or Officer.
- Solicit feedback from membership on state and national issues effecting local chapter.
- Encourage IFAPAC Contributions from local leaders (Board and Committee Chairs).
- Attend NAIFA’s Congressional Conference.

June

- Assist in Board and Committee Orientation.
- Assist in completion of local officer and committee chairs for submission to NAIFA National by June 30, 2015.
- Assist membership chair in final push for membership goal.
- Coordinate with State in fundraising for a NAIFA Candidate if your state is running someone.
Professional Development & Programs Chair

The professional development & programs chair is responsible for planning and executing member meetings, promoting professional career development and other NAIFA benefits, and providing members with quality education programs. These educational opportunities will enhance members’ knowledge and ability to market and sell insurance and other financial products and services. Additionally, the professional development & programs chair should ensure that local members receive the resources they need to meet their state CE requirements and organize member-networking meetings.

Professional Development is the #1 reason why new members join their association.

State Professional Development & Programs Chair Responsibilities

- Oversee PDP chairs from all locals.
- Ensure local PDP chairs are committed and have adequate training.
- Provide local PDP chairs with state CE requirements & filing procedures.
- Coordinate with the state Leadership in Life Institute (LILI) chair.
- Support and promote Advisor 2020 Workshop and the NAIFA LUTCF Designation Program.
- Promote the Jack E. Bobo Award of Excellence and NAIFA Quality Award Program.
- Understand and promote NAIFA’s Programs-in-a-Box.
- Promote NAIFA Advocacy programs (APIC and IFAPAC).

Local Professional Development & Programs Chair Responsibilities

- Communicate & coordinate with membership and Leadership in Life Institute (LILI) chairs (if applicable).
- Work to achieve the goals of the Jack E. Bobo Award of Excellence.
- Provide professional development programs for the four practice specialties: life insurance and annuities, health and employee benefits, multiline, and financial advising and investments, for both new and experienced members.
- Provide enough seminars to fulfill state CE requirements.
- Provide sales, marketing and prospecting ideas, practice management and motivational content, and topics on industry trends.
- Take advantage of NAIFA’s Professional Development Programs and Practice Resources, including the Advisor 2020 Workshop, the NAIFA LUTCF Designation Program, NAIFA ClientCast and the CalSurance E&O Insurance Program.
- Plan, promote and produce association meetings.
- Promote the NAIFA Quality Award Program.
- Develop programs for the Young Advisors Team (YAT) and/or work with your local YAT chair.
- Utilize the Meeting Template and Resources.
- Work with GR, IFAPAC, and APIC Chairs to promote NAIFA Advocacy programs.

Setting Goals and Getting Organized

Local professional development & programs chair:

- Attend your State Association Leadership Conference.
- Form a committee, appoint a co-chair responsible for event logistics (refer to the Successful Meetings Guide), include membership, YAT, and LILI chairs (if applicable).
- Attend the NAIFA Career Conference and Annual Meeting.
- Attend Congressional Conference
- Plan to make your annual IFAPAC contribution. (if you are not already on bank draft)

Hold a Committee Meeting in April

- Review the local Jack E. Bobo Award of Excellence (it will outline overall expectations of your programming).
- Review your State CE requirements making sure eligible seminars are approved for CE (your State Association Executive generally files for continuing education credits).
- Develop goals/objectives for the year.
- Brainstorm new education, professional development and networking opportunities.
- Identify program topics.
- Develop a budget.
- Coordinate dates of all programs.
- Promote meetings.
Place a check near the responsibility after you have completed it. It might also be helpful to note the date the responsibility was completed so that you can see if it needs to be completed earlier next year by your successor.

**April 2015 (Prepare for Office)**
- Graduate from the NAIFA National Online Leadership Academy.
- Review past association programs and talk with past leaders and members to prepare ideas for the year ahead.
- Consult with president-elect to identify expectations.
- Select a vice-chair and committee.
- Review Jack E. Bobo Award of Excellence online application.
- Develop goals and objectives of committee.
- Coordinate schedule of regular meetings and professional development programs sponsored by the association. Consult with the president-elect and incoming membership, government relations, YAT, and state LILI chairs as you prepare the proposed schedule for the year ahead.
- Promote the NAIFA Quality Award Program and May 29 deadline for submission of award application.
- Organize or help at a CE seminar at your state conference.
- Publicize and hold April meetings on financial investments and advising.
- Plan and promote March YAT event with your local YAT chair.
- Confirm arrangements for May Association Annual Meeting.
- Promote a specific NAIFA Member Benefit.
- Promote May 19-20 Congressional Conference.

**June**
- Publicize and hold June association meeting and installation of officers.
- Coordinate with state LILI chair to promote Leadership in Life Institute (LILI) program.
- Prepare final committee report to the board and make recommendations to next year’s chair.
- Promote attendance at the NAIFA Career Conference and Annual Meeting.
- Promote a specific NAIFA Member Benefit.

**July**
- Hold first committee meeting.
- Submit committee annual events calendar and proposed budget to president. Be sure to include a sufficient speaker budget.
- Enlist speakers for your fall and winter programs. Remember, speakers are your #1 drawing card.
- Also consider NAIFA Programs-in-a-Box program offerings.
- Promote attendance at the NAIFA Career Conference and Annual Meeting.
- Promote a specific NAIFA Member Benefit.

**May 2015 (Prepare for Office)**

**Disability Insurance Awareness Month**
- Attend State Association Leadership Conference.
- Attend local annual planning session.
- Coordinate with the local YAT chair to plan summer networking event for YAT.
- Coordinate with state LILI chair to promote Leadership in Life Institute (LILI) program.
- Promote attendance at the NAIFA Career Conference and Annual Meeting.
- Promote a specific NAIFA Member Benefit.
- May 20-21: Attend Congressional Conference.
August

- Hold first committee meeting.
- Submit committee annual events calendar and proposed budget to president. Be sure to include a sufficient speaker budget.
- Enlist speakers for your fall and winter programs. Remember, speakers are your #1 drawing card.
- Also consider NAIFA Programs-in-a-Box program offerings.
- Promote attendance at the NAIFA Career Conference and Annual Meeting.
- Promote a specific NAIFA Member Benefit.
- Make your annual contribution to IFAPAC (if you're not on monthly bank draft).

September (Life Insurance Awareness Month)

- Enlist speakers for your CE classes.
- Promote fall meetings and seminars.
- Announce fall seminars at your NAIFA monthly meeting.
- Publicize and hold September meeting(s).
- Confirm arrangements for October health-related meeting(s).
- Promote October YAT event. Coordinate with local YAT chair.
- Attend NAIFA Career Conference and Annual Meeting.
- Promote a specific NAIFA Member Benefit.

October

- Put on a seminar before or after your NAIFA monthly meeting.
- Start planning your Spring CE Fair.
- Publicize and hold October health-related meeting.
- Confirm arrangements for November meeting.
- Hold YAT event. Coordinate with local YAT chair.
- Promote a specific NAIFA Member Benefit.

November (Long-Term Care Awareness Month)

- Put on a CE program before or after your NAIFA monthly meeting.
- Publicize and hold November meeting.
- Confirm arrangements for December awards ceremony.
- Promote a specific NAIFA Member Benefit.

December

- Put on a seminar before or after your NAIFA monthly meeting.
- Prepare article on education activity in your association for local or state publications, or regional trade publication.
- Publicize and hold December awards ceremony.
- Confirm arrangements for January legislative meeting.
- Promote a specific NAIFA Member Benefit.

January 2016

- Put on a seminar before or after your NAIFA monthly meeting.
- Report programs to state professional development chair.
- Publicize and hold January legislative-focused meeting.
- Confirm arrangements for February meeting.
- Work with YAT chair to plan YAT Awareness Month activity.
- Promote a specific NAIFA Member Benefit.

February

- Put on a seminar before or after your NAIFA monthly meeting.
- Check your Award of Excellence application to see where you stand and what activities need your immediate action.
- Publicize and hold February meeting.
- Confirm arrangements for March multi-line related meeting.
- Hold YAT event. Coordinate with local YAT chair.
- Promote a specific NAIFA Member Benefit.
- Promote Congressional Conference.
March (YAT Awareness Month)

- Publicize and hold March multi-line related meeting.
- Promote NAIFA Quality Award and May 31 deadline for submission.
- Confirm arrangements for April meeting on financial investments and advising.
- Promote YAT Awareness Month and conduct related activity. Coordinate with YAT chair.
- Promote attendance at NAIFA Career Conference and Annual Meeting.
- Promote a specific NAIFA Member Benefit.

April

- Graduate from the NAIFA National Online Leadership Academy.
Membership Chair

NAIFA’s membership efforts rely on collective leadership from local and state membership chairs. Volunteer leaders in these positions help guide NAIFA by connecting new, current and prospective members with the people, programs and resources they need to succeed.

In planning your membership strategies and goals, it’s important to work closely with your members, committees and board of directors to enlist their support and ensure that membership recruitment and retention is integrated into all of your association activities and efforts.

Local Membership Chair Responsibilities

Your role as local membership chair is the foundation of membership activities throughout the federation. It is at the local level that members have their first contact and acquire their impression of NAIFA and the local association. It is also on the local level that allows NAIFA the most personalized touches for members. Your main responsibilities include:

• Build a team. Recruit, organize, train, and motivate local membership team members.

• Evaluate previous membership efforts and assess the association’s membership needs and trends.

• Utilize the NAIFA National Online Service Center to access local membership numbers and reports, and to review the membership status of local members.

• Create a Membership Plan for the year. Involve other committees and your board in completing this plan.

• As part of your plan, implement a Field Leaders Summit (FLS) at least twice a year.

• Leverage corporate outreach program resources, including endorsement letters and the Corporate Partnerships Highlights Guide, to assist with membership recruitment at agency presentations and state and local events. Review the endorsement letter link and highlights guide prior to facilitating agency presentations to determine if a company endorses NAIFA and what, if any, programs the company has in place to support membership.

• Share your Membership Plan with your state membership chair along with any challenges and successes throughout the year.

• Lead your membership team in implementing the Membership Plan.

• Recruit and retain members using the NAIFA MemberNet.

• Encourage teamwork and link membership and local programming.

• Serve as a membership spokesperson in your local and state associations.

• Develop and implement a membership chair succession plan. Ensure a smooth and effective transition from one year to the next through training, leadership development, accurate record-keeping and administration.

• Work with your local secretary/treasurer on membership processing procedures. For more information, please see the NAIFA Membership Procedures Guidebook.

• Approach potential members and make the “Membership Ask.” Gather prospect contact information during meetings and events where nonmembers are in attendance in order to conduct follow up.

• Support your state membership chairs in carrying out their plans and achieving measurable goals including membership recruitment and retention.

• Support NAIFA-National Membership Campaigns.

• Promote the benefits of NAIFA’s advocacy programs and how they work to protect your business.

Specific Responsibilities to Your States

Maintain regular contact with your state membership chair.

Specific Leadership Skills Helpful to the Position

Planning and goal setting, communication, team building, mentoring, public speaking, training, and accountability.

Time Commitment

Along with the time necessary to accomplish the stated responsibilities and on-going dialogue with your state membership chair, attend your state’s Association Leadership Conference, local and state meetings and NAIFA Career Conference and Annual Meeting, if possible.
Available Resources

Local leadership and volunteers, state membership chair, NAIFA staff, and a host of membership recruitment and retention materials available online and via the NAIFA Member Service Center at 877-TO-NAIFA (866-2432) or membersupport@naifa.org. Please follow-up with NAIFA–National to ensure they have your current email address.

The NAIFA National Online Service Center was created to be your one-stop resource for NAIFA data management.

State Membership Chair’s Responsibilities

Your role as state membership chair is to serve as a vital resource to local membership chairs, promote local and state membership campaigns and programs, and to ensure membership recruitment and retention goals are achieved.

• Organize a state membership team.

• Communicate with your local membership chairs your vision for the state and expectations.

• Train local membership chairs on how to develop and run effective recruitment and retention campaigns.

• Utilize the NAIFA National Online Service Center to access state and local membership numbers, reports, and evaluate state membership progress.

• Develop the State Membership Plan for the year. Ensure your locals do the same.

• Implement a Field Leaders Summit. Ensure your locals do the same.

• Leverage corporate outreach program resources, including endorsement letters and the Corporate Partnerships Highlights Guide, to assist with membership recruitment at agency presentations and state and local events. Review the endorsement letter link and highlights guide prior to facilitating agency presentations to determine if a company endorses NAIFA and what, if any programs the company has in place to support membership.

• Recruit and retain members using the NAIFA MemberNet.

• Encourage teamwork and link membership and local programming.

• Serve as a membership spokesperson in your state and local and communicate effectively NAIFA’s value proposition to both current and prospective members.

• Develop and implement a membership chair succession plan. Ensure a smooth and effective succession from one year to the next through training, leadership development, accurate record-keeping and administration.

• Approach potential members and make the “Membership Ask.” Gather prospect contact information during meetings and events where nonmembers are in attendance in order to conduct follow up.

• Keep local chairs motivated through on-going communication, recognition and progress acknowledgement.

• Support NAIFA-National Membership Campaigns.

• Promote the benefits of NAIFA’s advocacy programs and how they help protect your business.

• Make your annual IFAPAC contribution.

Specific Responsibilities to Your States

Maintain regular contact with local membership chairs and keep them informed of state and national campaigns. Share successful strategies with your locals. Recognize their achievements.

Specific Leadership Skills Helpful to the Position

Planning and goal setting, communication, team building, mentoring, public speaking, training, and accountability.

Time Commitment

Along with the time necessary to accomplish the stated responsibilities, attend your state’s Association Leadership Conference and NAIFA Career Conference and Annual Meeting, if possible. Participate in calls with NAIFA National staff and on-going communication with your local membership chairs.

Available Resources

State leadership, local membership chairs, NAIFA staff, Online Service Center, NAIFA National Online Leadership Academy and a host of membership recruitment and retention materials available online and via the NAIFA Member Service Center at 877-TO-NAIFA (866-2432) or membersupport@naifa.org.
Local and State Outline for a Successful Year

Train Membership Chairs

- Agency Presentations
- Membership Plans
- NAIFA Web Site
- Association Leadership Conference presentations
- NAIFA MemberNet
- NAIFA Online Service Center
- Corporate Partnerships Programs
- New Member Orientation Program
- NAIFA Career Conference and Annual Meeting membership activities (for those who attend)
- NAIFA SmartBrief
- NAIFA National Online Leadership Academy

Promote NAIFA Initiatives

- Member recruitment campaigns
- Agency presentations
- Managers Membership Award (MMA)
- Corporate Partnerships Program
- Monthly Payment Program
- NAIFA Career Conference and Annual Meeting
- YAT (Young Advisors Team)
- Outstanding Member Recruiters
- National Membership Conference Calls
- NAIFA Online Service Center
- Field Leaders Forums
- “It Pays” NAIFA Messaging Campaign
- NAIFA's Congressional Conference
- IFAPAC
- APIC

Communicate Regularly

- Email/listserv messages
- Follow up with NAIFA staff & local membership chairs
- Recognize successes and challenges
- Solicit Best Practices

Know Your Association

- Size and demographics
- Track membership numbers — monitor membership totals on the Online Service Center
- Programs and activity
- Member recruitment and retention campaigns
- Graduate from the NAIFA National Online Leadership Academy
Government Relations Chair

The government relations chair has overall responsibility for the association’s legislative programs as well as oversight of the Political Involvement Committee (APIC) and Political Action Committee (IFAPAC) if no chairs are in place. To assist with these responsibilities, the president and chair should work together to recruit chairs for APIC and IFAPAC, and create separate APIC and IFAPAC subcommittees.

Setting Goals and Getting Organized

The goal of the government relations chair is to assure the success of NAIFA’s legislative objectives at the local level. This involves:

- Identifying association leaders capable of coordinating legislative activities and gaining their commitment to serve on the Government Relations Committee.
- Organizing the committee and assigning members specific tasks and areas of responsibility.
- Enlisting the support of the association’s board and leadership team.
- Ensuring that committee members have the necessary resources and support.
- Maintaining close communication with committee members and monitoring their activities.
- Work with the IFAPAC chair who is in charge of fundraising for IFAPAC.
- Work with the APIC chair who is in charge of recruiting APIC contacts.
- Obtain and read a copy of the annual PIC/PAC Guide for detailed description of IFAPAC and APIC responsibilities.
- Attend Annual IFAPAC/APIC Planning Meeting.
- Promote the use of NAIFA GR Mobile.

Objectives of the Government Relations Chair

In the legislative arena, you are charged with:

- Knowing and understanding NAIFA’s legislative and regulatory positions, both at state & federal levels.
- Communicating these positions and legislative updates to your association’s board of directors and members:
  - At board and association meetings
  - Through emailings to individual members
  - By arranging for issue/position and legislative updates to be placed in the association newsletter
  - By promoting and/or forwarding NAIFA’s GovCommunications to association members

More detailed information on legislative duties is included in the Advocacy Guide.

If there is not an IFAPAC chair, these are your responsibilities. Otherwise, it is your role to help IFAPAC meet its fundraising goals in order to support both state and federal candidates who understand issues that are important to insurance agents and financial advisors. You and your designee are charged with:

- Being responsible for seeing that the association’s IFAPAC fundraising drive reaches its goals by:
  - Setting fundraising goals (both contribution and contributor)
  - Outlining the year’s IFAPAC fundraising plan before your association’s board and enlisting the members’ support
  - Holding at least one association general meeting highlighting the need for political involvement and the value of IFAPAC
  - Conducting fundraising campaigns, such as phone-a-thons and mailings to each member soliciting support for IFAPAC
  - Ensuring that all members of your association have signed their IFAPAC Member Directive designating how their PAC contributions will be distributed
  - Attending training sessions put on by your state IFAPAC chair

A detailed description of the IFAPAC chair’s duties is in the Political Action and Political Involvement Guide.

If there is not an APIC chair, your support in building a network of politically involved agents and advisors is essential to the success of NAIFA’s legislative program. You are charged with:

- Establishing effective methods for communicating APIC information to the association’s contacts and providing appropriate feedback to the state chair.
- Involving your association members in federal legislative issues at the direction of NAIFA’s Government Relations Committee, including encouraging timely responses to NAIFA GovAlerts (action alerts).
Responsibilities — Government Relations Chair

- Cultivating individual relationships with legislators by:
  - Inviting members of Congress, state legislators and other elected officials to address the membership at an association meeting
  - Providing an occasion for state and federal candidates to address the membership
  - Encouraging association members to participate in the “Day at the Capital” programs
  - Encourage association members to regularly meet with their legislators

Although the legislative process often defies a rigid timetable and flexibility is necessary in attempting to influence the process, here is a suggested calendar for the government relations chair that might serve as a guide for establishing an annual cycle of legislative activity. More detailed calendars are in the Advocacy Guide and Political Action and Political Involvement Guide.

July

- Review the records and files of your predecessor and last year’s activities. Check to make sure all local member email addresses have been forwarded to NAIFA—National.
- Plan IFAPAC fundraising events, using Leadership Citation or Tribute to Excellence levels as benchmarks.
- Organize your committee.
- Seek direction from the association president.
- Attend the Association Leadership Conference and the workshop for government relations chairs as well as IFAPAC training sessions.
- If this is an election year, review the slate of candidates to determine their positions and records concerning industry issues.
- Reach out to your association’s YAT chair for assistance in gaining new legislative contacts and new IFAPAC contributors.
- Work with the local president to appoint a chair in charge of IFAPAC.
- Work with the local president to appoint a chair in charge of APIC.
- Familiarize yourself with state and federal laws covering political action committees.
- Ask the IFAPAC chair what his/her plans are for the fundraising year.

August

- Review the APIC contact files and begin to update and expand the list.
- Finalize the year’s activities and submit your budget to the treasurer.
- Make sure your association forwards its $3 per capita administrative contribution to National IFAPAC.
- Make your annual contribution to IFAPAC (if you’re not on monthly bank draft).
- Plan to attend the Annual IFAPAC/APIC Planning Meeting.

September (Life Insurance Awareness Month)

- Work with the IFAPAC chair to review the IFAPAC fundraising plan and benchmarks. Adjust the plan accordingly for remainder of the year.
- Work with the program chair to develop at least one annual program concerning association legislative issues and invite your legislators to attend and speak.
- If this is an election year, invite local candidates to speak at an association gathering.

October

- Attend the NAIFA Career Conference and Annual Meeting and committee meetings on government relations and legislation. Review the programs for other sessions pertaining to legislation and regulation.
- Review legislative and regulatory issues affecting members.
- Encourage members to become involved in politics and to vote.
- Plan a year-end fundraising drive for IFAPAC. Collect contributions.
- Check the Bobo Award criterion to ensure that all IFAPAC requirements are completed by December 30. Ensure your local association’s $3 administrative IFAPAC contribution has been mailed to IFAPAC.
November (Long-Term Care Awareness Month)

- Make an updated report to the membership on IFAPAC fundraising goals and APIC contact recruitment.
- Make a list of newly elected candidates (if it’s an election year) and publicize the need for new NAIFA member contacts for these representatives.
- Evaluate your association’s IFAPAC fundraising results to date. Launch your year-end effort to achieve IFAPAC Leadership Citation or Tribute to Excellence levels of performance.
- Set 2016 fundraising goals and formulate plans.

December

- Evaluate your association’s IFAPAC fundraising results to date. Launch your year-end effort to achieve IFAPAC Leadership Citation or Tribute to Excellence levels of performance.
- Federal and state legislators are most likely to be home for the holidays. It is a good time to meet with them and renew your relationship or introduce yourself.
- **December 30:** IFAPAC donations due to NAIFA. Please note that donations must be at NAIFA Headquarters by December 30. Any donations received at headquarters after that date will be processed for the next year.

January

- Begin to implement the new IFAPAC fundraising programs for the year. Plan now to achieve IFAPAC Leadership Citation or Tribute to Excellence level performance for the coming year.
- Alert membership of legislative and regulatory activities, both through state-specific emails and through forwarding NAIFA GovCommunications.
- Invite the state YAT chair to participate fully in all advocacy programs.
- Register for NAIFA’s May Congressional Conference.

February/March

- Survey the association membership for state or federal issues of special concern.
- Promote attendance at Congressional Conference.
- Organize a political action training program.
- Suggest or assist in planning an advocacy program/event for YAT Awareness Month (March) with the YAT chair.

April

- Review legislative bulletins, educate membership and update legislative files.
- Promote all IFAPAC fundraising programs.

May/June

- Have your final committee meeting to evaluate association activities and make a final report. Make recommendations for the next association year and pass on all files and materials to the new chair.
- Encourage newly appointed committee members to attend the State Association Leadership Conference.
- Check that your local association APIC and IFAPAC chairs are budgeted to attend the Annual IFAPAC APIC Planning Meeting.
- Attend NAIFA’s Congressional Conference.
- Make sure the association has budgeted for its $3 per capita administrative recommended contribution.
State LILI Chair

You can impact the lives of others and help bring strong leadership to your local and state associations by serving as your state LILI chair (SLC). As the key contact for the program in your state, the state LILI chair works in harmony with the state executive and moderator to provide oversight of activities related to the administration, promotion and continuation of the LILI program. This person should be passionate about the program and agree to hold the position for two years.

State LILI Chair Responsibilities

- Work with state leaders to establish a state LILI team.
- Lead state LILI team in educating members and local associations about the value of LILI.
- Use “LILI Tools for Leaders” on the NAIFA website.
- Work with state board and staff to prepare budget and set student tuition.
- Assist state leaders in selecting a qualified moderator.
- Collaborate with moderator to set class dates and provide logistical support.
- Recruit prospective students and chair the student selection committee.
- Participate in LILI webinars and trainings provided by NAIFA National.
- Make an annual IFAPAC contribution (if not already on bank draft).

Listserv & Newsletters

Use the SLC listserv to network with chairs in other states. The listserv is also used to send newsletters and conference call notices.

LILI Leaders Support

To contact your state’s LILI Mentor, visit http://www.naifa.org/professional-development/leadership-in-life-institute/lili-mentors

To view LILI resources for state associations, visit www.naifa.org/professional-development/leadership-in-life-institute/lili-2015-states
Classes may start any time between November and July. The timeline below is based on an Institute start date of January. States starting earlier than January should move timeline dates up accordingly, except for the LILI Moderator Training Conference which takes place in September for first time moderators.

**As Scheduled Throughout Year**
- Participate in all NAIFA webinars and trainings for state LILI teams.
- Market and promote LILI to state and local associations.
- Encourage and recruit members who qualify to be students.
- Provide regular updates to state board regarding program status, i.e. written or verbal report at each state board meeting.

**January 2015**
- State president appoints state LILI chair (SLC) for next year. Ideally, this person will serve for a full association year (July – June).
- Decide who will be on your state LILI team.
- When the state LILI team is appointed, train on the LILI Tools found on the NAIFA website and confirm everyone has access.
- Work with moderator on logistical and administrative issues for LILI class.

**February**
- Work with moderator on logistical and administrative issues for LILI class.
- Obtain list of local leaders and write letter or email to educate them about LILI and request list of potential students.
- Order supplies through NAIFA Marketplace to promote LILI at State Conference.
- Educate team on ways to promote LILI and ask them to be available to visit and promote program to locals.

**March**
- Work with moderator on logistical and administrative issues for LILI class.
- Make follow-up phone calls regarding letter/email sent to local leadership.
- Work with moderator to determine date and location of graduation. Decide if LILI alumni will be invited (in which case, print invitations).
- With your team, coordinate promotional efforts for State Conference.

**April**
- Work with moderator on logistical and administrative issues for LILI class.
- Work with NAIFA state executive to send mass email promoting LILI to all members in state. Ask them to contact you for more information.
- Confirm location for graduation and begin preparing program.
- Invite state leaders to graduation.
- Present proposed LILI budget to state board.
- Work with team and state president or president-elect to select moderator for next year. Moderator applications are available beginning April 1 and due by June 30.

**May**
- Finalize plans for graduation.
- Confirm special guests.
- Send email inviting members to attend State Conference.
- Follow up on requests for additional information from last month’s letter/email to members. Ask team to help respond to inquiries.
- Send class photo (usually taken in Session Five) to NAIFA National.
- Confirm list of students graduating and order commencement materials (NAIFA National will send list for state to review approx. 5 weeks before graduation date).
- Attend NAIFA’s Congressional Conference.
June
- Intensify efforts to recruit students for next year:
  - Contact all locals who have not recruited 2 applicants and request list of potential students.
  - Publish articles in newsletter.
  - Visit and make announcements at local meetings.
  - Empower and prepare team members to promote LILI.
- Work with moderator on graduation.
- Work with state executive to prepare final budget to present to state board.
- Prepare schedule for next year’s class and begin collecting student applications.
- Make sure next year’s moderator submits application by June 30.

July
- Send applications to potential students.
- Continue promoting LILI to local leaders and members.
- Communicate preferred student application deadline of August 31 (based on January start date).

August
- Name student selection committee (which may be the same as state team). Five-person committee is suggested, consisting of state LILI chair, moderator and three of the following: LILI graduate, state executive, state president, state president-elect, or national committeeperson.
- With committee, coordinate LILI promotion efforts.
- Collect applications for next year’s Institute.
- Make annual contribution to IFAPAC (if you’re not on monthly bank draft).

September
- Send copies of completed applications to selection committee.
- Set date to review applications via conference call or in person. Note: Minimum class size is 7 and maximum is 14.

October
- Prepare acceptance and rejection letters for applicants.
- Coordinate logistics of next year’s Institute with moderator (location, meals).

November
- Send acceptance and rejection letters to applicants.
- Provide class roster to state executive (who submits order form to NAIFA).

December
- Confirm location, dates, times and other class logistics with moderator.
- Help moderator distribute Pre-Session One materials; coordinate Pre-Session One conference call; and plan meals.
- Work with moderator to set guest speaker schedule.
Health Chair

Health chairs serve as the health and employee benefits “experts” within each state and local association, and are integral players in ensuring that NAIFA members are best served on these issues.

State and local health chairs share common responsibilities in many areas. The state chair is responsible for coordinating the multitude of activities within the entire state, working with the national leaders, and communicating with the local chairs.

The local chairs are responsible for planning and implementing initiatives at the local association level. Effective communication between local chairs, state chairs and national leadership is necessary in order to best meet the needs of the membership.

The health chair is appointed by the state or local NAIFA president for each association.

Health Chair Roles & Responsibilities

The state and local health chairs play a unique role within the NAIFA associations as they will often need to collaborate and work with other association leaders to ensure that health and employee benefits are included in all of the following areas:

• Legislative Advocacy and Public Relations
  – Serve as a resource for association members concerning legislative activity that impacts health and employee benefits issues.
  – Collaborate with your government relations chair to assist in tracking and communicating health-related legislative and regulatory issues to NAIFA members.
  – Assist your association’s APIC and IFAPAC chairs to ensure a strong, active grassroots network within your association.
  – Make an annual IFAPAC contribution if you are not already on bank draft.

• Educational Programming and Professional Development
  – Collaborate with your professional development and programs chairs to ensure that quality health-related programming will be included in the calendar for the year.
  – Become familiar with the health and employee benefits-related products and services offered by NAIFA and encourage your association members to take advantage of these services.

• Membership Recruitment and Retention
  – Collaborate with your association’s membership chair to ensure that health and employee benefits agents are being approached to join NAIFA.
  – Assist membership marketing campaigns by highlighting information on the health and employee benefits services provided by NAIFA.
**YAT (Young Advisors Team) Chair**

NAIFA created the Young Advisors Team (YAT) for members who are 40 years of age and under, or in their first five years in the business. The mission of the Young Advisors Team (YAT) 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.

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 of NAIFA membership.

**Local YAT Chair Responsibilities**

- Identify YATs in your area for inclusion in YAT programming by accessing the NAIFA Online Service Center and generating a current YAT list (select the YAT box to segment this demographic). For detailed instructions on how to utilize the Online Service Center, please view the user guide on the home page. If you have questions or require assistance, contact OSC@naifa.org.

- To be identified as a YAT, date of birth and license year must be included in a member’s profile. Please ensure this information is completed in the member’s online profile. You may also collect their date of birth and/or license year to update in the Online Service Center.

- Make sure the YAT chair contact information for your local is correct on the YAT webpage, www.naifa.org/yat. If the information is incorrect, contact YAT at yat@naifa.org.

- Nominate outstanding YATs for the YAT Leader of the Year Award.

- Plan and execute an event in March for YAT Awareness Month. Work with your local leaders and membership chair for joint activities.

- Promote the NAIFA Career Conference and Annual Meeting and the YAT Forum and Conference Activities.

- Work with the IFAPAC chair to promote IFAPAC to YATs in your local and plan ways to get YATs to contribute.

- Volunteer to help PAC committee solicit YATs during fundraisers.

- Make annual IFAPAC contribution.

- Check NAIFA’s website 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 local associations are doing.

- Work with your association’s APIC and Government Relations chairs to involve YATs in district meetings with Members of Congress.

- It is important to attempt to plan YAT focused activities on a monthly or quarterly basis.

- Fulfill the revised goals of YAT by recruiting those within their first five years in the business, regardless of age, for YAT events.

- Make sure to promote and encourage viewing of YAT Chat, a monthly online feature containing tips and ideas for the young advisor. All YATs automatically receive YAT Chat via email.

- Hold educational events using NAIFA’s “Programs in a Box” (PIB).

- Work with your membership chair to help recruit young and new advisors to NAIFA.

- Work with your leadership to welcome new members into the association (especially YATs), determine their interests and encourage them to become active volunteers for NAIFA based on the interests they expressed.

- Solicit Best Practices and submit to yat@naifa.org.

- Foster social networking with your YATs by encouraging them to participate in the YAT LinkedIn group, Twitter feed and Facebook.

- Work with the leadership in your area to promote Advisor Today’s “Four Under Forty” nomination process.

- Follow your Federal Legislators on social media and encourage your YAT members to do the same.

- Promote YAT attendance at NAIFA’s Congressional Conference.

- Encourage YATs to write and submit YAT in Action stories for the NAIFA website and social media.

- Participate and graduate from The NAIFA Online Leadership Academy. Session 2 of The Academy contains a YAT Chair specific sub-session.

- Participate in the NAIFA federation wide quarterly YAT Chair conference calls.

- Review the YAT Playbook and YAT Resource Guide.
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### UPCOMING DEADLINES

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**Member Benefits**

**PDP-YAT** Plan association programs and events for the upcoming year. Consider Programs-in-a-Box, NAIFA Quality Award recognition, providing programs to appeal to all practice specialties, as well as members under 40 years old. Host summer networking event to encourage interest and participation.

**PDP** Review Successful Meetings handbook. Work with committees on structure and frequency of association meetings as well as meeting location.

Promote the NAIFA Career Conference and Annual Meeting. Early Bird Registration deadline.

Develop a list of Continuing Education programs for the year.

Consider Programs-in-a-Box for NAIFA State and Local Associations.

Promote a NAIFA Member Benefit.

Promote the NAIFA Career Conference and Annual Meeting.

**PDP-P** Begin to publicize and plan for September’s Life Insurance Awareness Month.

Complete the NAIFA Online Leadership Academy.

**Advocacy**

**GR** Monitor state legislation and read GovTalk to familiarize yourself with current and upcoming legislative issues.

**PIC-GR** Review your state’s APIC contacts report (available online in the APIC section of the NAIFA Website.) Call current APIC contacts to introduce yourself and get updates on their activities.

**PAC-GR-P** Update IFAPAC fundraising plan. Review IFAPAC goals and benchmarks since January 1.

**PAC-GR-P** Approach all newly installed association officers, board members, and committee chairs to become IFAPAC contributors at the Century level or greater.

**GR-PAC** Review slate of candidates in an election year to determine IFAPAC support in light of NAIFA’s concerns and insurance and financial services issues.

**GR-PDP** Meet with professional development and programs chair to develop at least one legislative program for this association year.

**PAC-GR-P-ST** Budget for annual IFAPAC administrative contribution. ($3 per member is recommended).

**ALL** Complete the NAIFA Online Leadership Academy.

**Membership**

**P-MC** Finalize Membership Plan for the Association Year.

Launch Membership Campaign.

**P-MC** Welcome and engage new members.

**MC-P-ST-AE** Become familiar with available membership resources, including available reports, by meeting with the past-president, secretary/treasurer, membership chair, and association executive.


**MC** Request and review YAT & LIFE materials for future programs.

Register early for the NAIFA Career Conference and Annual Meeting and membership workshop by August 4, 2015.

Complete the NAIFA Online Leadership Academy.

**Governance and Administration**

**P** Review Association Annual Plan for second half of association year.

**P-ST-MC-AE** Review Membership Procedures Handbook, noting the responsibilities of various members of the management team—the president, secretary/treasurer, membership chair and the association executive.

**P-AE** Contact state association regarding plans for the State Association Leadership Conference.

**P-NC** Register president, national committeeperson and association executive for NAIFA Career Conference and Annual Meeting.

**P-NC-AE** Register association executive for NAIFA Conference, featuring an Executive Track.

Conduct orientation session for board and committee chairs.

Review action items from association’s strategic plan.

**P-ST-AE** Make sure officers and committee chairs have been reported to the state office before the June 30, 2014 deadline.

Review and approve association budget.

**ST-AE** Send out July Association Newsletter.

Subscribe to NAIFA SmartBrief.

Arrange for association audit and plan to file IRS Form 990 or Form 990-EZ prior to November 15. Go to www.irs.gov for more information.

Complete the NAIFA Online Leadership Academy.
## Member Meeting Notes

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Program/Speaker:

Agenda:

Topic:

Practice specialty focus: L&A  H&EB  ML  FA&I  Legislative Day

CE credits offered:

Member benefit(s) offered:

Agenda/Notes:

Lessons Learned/Notes To My Successor:

### Action Items:

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Program/Speaker:

### Important Dates

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### "Who's Responsible" Key

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**Agenda:**

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**UPCOMING DEADLINES**
Member Benefits

**PDP**  Make final plans for the fall regular meetings and complete the meeting schedule for the year.

Confirn logistical arrangements for September membership meeting.

Begin to publicize and continue planning for Life Insurance Awareness Month.

Promote the NAIFA Career Conference and Annual Meeting. Advance registration deadline: August 4, 2015

Promote a NAIFA Member Benefit.

**PDP-P**  Consider ways to enhance association meetings, such as utilizing Table Host Program.

Promote Advisor 2020 Workshop and the NAIFA LUTCF Designation Program

Consider Programs-in-a-Box offerings for NAIFA State and Local Associations.

**YAT**  Host summer networking event to encourage interest and participation.

Advocacy

**GR**  Invite a Member of Congress or his/her staff to your association meeting on legislation in December.

**PAC-GR**  In an election year, ensure that funds are received by IFAPAC by September in order to be used in campaigns for the current year.

Continue reviewing IFAPAC fundraising goals and ensure proper resources are available for solicitation and outreach.

**PAC-GR-ST-P**  Hold IFAPAC Phon-a-thon to increase contributions and the number of new contributors. Follow up with president and secretary/treasurer regarding the association’s $3 per capita contribution to the IFAPAC administrative fund.

**PIC-GR**  Review the ratings on your state’s APIC Legislative Contact report (available online in the APIC section of the NAIIFA website).

**GR**  Read GovTalk, GovUpdate, and State legislative bulletins.

Respond to GovAlerts and encourage action from association members.

**PIC**  Encourage APIC contacts to meet with their members of Congress while on August recess.

**PIC-PAC-GR**  Plan to attend PIC/PAC Planning Meeting.

Membership

**MC**  Review the membership plan.

Welcome and engage new members.

Invite current members and recently lapsed members to monthly association meeting.

Call your lapsed members and those in their renewal cycle. Encourage participation in the monthly payment program and track your results in MemberNet.

Reach out to prospective members and invite them to association events and/or meetings. Create a hot prospect list and share it with NAIFA National.

Conduct agency presentations – promote Manager’s Membership Award.

Make the membership ask.

**MC-PDP**  Plan LIFE program event to promote LIAM and recruit new members.

Governance and Administration

**P**  Review Association Annual Plan for second half of association year.

**P-AE**  Make sure officers and committee chairs have been reported to the state association to ensure voting privileges are intact at the NAIFA Career Conference and Annual Meeting.

**NC-P-AE**  Ensure delegates are reported and registered for the NAIFA Career Conference and Annual Meeting.

**All Leaders**  Attend State Association Leadership Conference if in August.

**ST-AE**  Prepare September association newsletter. Subscribe to NAIFA SmartBrief.

**NC**  State National Committeeperson participate in quarterly conference call with NAIFA National Secretary.

---

"WHO'S RESPONSIBLE" KEY

| P | President |
| PE | President-elect |
| ST | Secretary/Treasurer |
| NC | National Committeeperson |
| AE | Association Executive |
| MC | Membership Chair |

| PDP | Professional Development & Programs Chair |
| GR | Government Relations Chair |
| PAC | IFAPAC Chair |
| PIC | APIC Chair |
| YAT | Young Advisors Team Liaison |
## MEMBER MEETING NOTES

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**Program/Speaker:**

**Agenda:**

**Topic:**

Practice specialty focus:  
- L&A  
- H&EB  
- ML  
- FA&I  
- Legislative Day

**CE credits offered:**

**Member benefit(s) offered:**

**Agenda/Notes:**

Lessons Learned/Notes To My Successor:

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**Program/Speaker:**

### IMPORTANT DATES

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AUGUST 2015

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**BOARD COMMITTEE MEETING NOTES**

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SEPTEMBER 2015

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Are you 3/4 of the way toward both of your IFAPAC participation goals?

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UPCOMING DEADLINES
RESPONSIBILITIES: SEPTEMBER 2015

Member Benefits

**PDP-P·AE**
Publicize association program calendar.

**PDP**
Promote a NAIFA Member Benefit.

**PDP-P**
Promote and host September Association Meeting in honor of Life Insurance Awareness Month.

Conduct other activities surrounding Life Insurance Awareness Month.

**PDP-YAT**
Plan and publicize YAT event for October (example; Programs In A Box: Survive and Thrive in Your First Three Years).

Advocacy

**PAC-GR**
Continue to review IFAPAC goals and ensure proper resources and visibility are available for fundraising efforts. Focus on lapsed contributors and association leaders.

Keep the association on track to reach award level contributions to IFAPAC.

**PIC-GR**
Make personal calls to all APIC contacts to reevaluate their willingness and ability to continue as a contact.

**PIC-GR-PDP**
Work with professional development and programs chair to ensure members are apprised of legislative and regulatory issues.

Set up district meetings with members of Congress and APIC contacts for Thanksgiving recess.

**PIC-PAC-GR**
Plan to attend PIC/PAC Planning Meeting.

Membership

**P-MC**
Review the membership plan.

Welcome and engage new members.

Invite current members and recently lapsed members to monthly association meeting.

Call your lapsed and those in their renewal cycle.

Encourage participation in the monthly payment program and track your results in MemberNet.

Reach out to prospective members and invite them to association events and/or meetings. Create a hot prospect list and share it with NAIFA National.

Conduct agency presentations—promote Manager’s Membership Award.

Make the membership ask.

Host LIFE program event to promote LIAM and recruit new members.

Governance and Administration

**P**
Review Association Annual Action Plan for second half of association year.

Host “Insurance Matters” program from LIFE Foundation in your community.

**NC**
Invite new members to orientation meeting in November. Utilize New Member Orientation Guide.

**P-NC-AE**
Review action items from association’s strategic plan in preparation for September Board Meeting.

**P-AE**
Hold board meeting. All committee chairs should report on plans for the year.

**ST-AE**
Send out September association newsletter.

"WHO’S RESPONSIBLE" KEY

| P  | President       | PDP | Professional Development & Programs Chair |
| PE | President-elect | GR  | Government Relations Chair                |
| ST | Secretary/Treasurer | PAC | IFAPAC Chair                              |
| NC | National Committeeperson | PIC | APIC Chair                                |
| AE | Association Executive | YAT | Young Advisors Team Liaison               |
MEMBER MEETING NOTES

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<th>Date:</th>
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Program/Speaker:

Agenda:

Topic:

Practice specialty focus: L&A  H&EB  ML  FA&I  Legislative Day

CE credits offered:

Member benefit(s) offered:

Agenda/Notes:

Lessons Learned/Notes To My Successor:

**ACTION ITEMS:**

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**NEXT MEETING:**

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Program/Speaker:

**IMPORTANT DATES**

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## Agenda:

1. Review this month’s focus areas & determine adjustments to be reviewed next time.
   
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### ACTION ITEMS

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### UPCOMING DEADLINES

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2015–2016 Best Practices — NAIFA Local Associations 59
Attend the NAIFA Career Conference and Annual Meeting.

### Member Benefits

**PDP**
- Prepare for awards ceremony in December. Recognize award winners in November association newsletter.
- Promote a NAIFA Member Benefit.

**PDP-P**
- Confirm arrangements for November meeting.
- Promote Advisor 2020 Workshop and the NAIFA LUTCF® Designation Program

### Advocacy

**GR**
- Organize a special legislative meeting to educate members on the political process and the legislative and regulatory issues that impact NAIFA.

**PAC-GR**
- Follow up with association leadership, board and committee chairs to ensure that all have contributed at least at the Century Club level.

**PAC-GR-P**
- Work IFAPAC fundraising strategy and ensure that association is on target to make IFAPAC goals for year ending December 31, 2015.

**PIC-GR**
- Report APIC contacts to the national APIC office.

**PIC-GR**
- Encourage members to become involved in political campaigns and to work on voter registration drives.

**YAT**
- Encourage YATs to give to IFAPAC and participate in APIC activities.

**PIC-PAC**
- Register for PIC/PAC Planning Meeting.

### Membership

**MC**
- Review the membership plan.
- Welcome and engage new members.
- Invite current members and recently lapsed members to monthly association meeting.
- Call your lapsed and those in their renewal cycle.
- Encourage participation in the monthly payment program and track your results in MemberNet.
- Reach out to prospective members and invite them to association events and/or meetings. Create a hot prospect list and share it with NAIFA National.
- Conduct agency presentations– promote Manager’s Membership Award.
- Make the membership ask.

### Governance and Administration

**ST-P-AE**
- Ensure that necessary IRS Forms are completed to be filed prior to November 15.

**P-GR**
- Support the IFAPAC efforts to ensure that all Association Board Members have made IFAPAC contributions.
- Review Association Annual Plan for second half of association year.
- Review Association’s Strategic Plan and ensure that action items are being acted upon.
- Contact all committee chairs and ask for written reports for November Board Meeting and provide assistance to chairs when needed.

**NC-P**
- Report on NAIFA Career Conference and Annual Meeting at October Membership Meeting.

**P-AE**
- Review criteria of the Jack E. Bobo Award of Excellence.

**ST-AE**
- Prepare November association newsletter.

**NC-P-AE**
- Attend NAIFA Career Conference and Annual Meeting and encourage Association Executives to participate in the Executive Track.

### “WHO’S RESPONSIBLE” KEY

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## MEMBER MEETING NOTES

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**Program/Speaker:**  

**Agenda:**  

**Topic:**  

Practice specialty focus:  
- [ ] L&A  
- [ ] H&EB  
- [ ] ML  
- [ ] FA&I  
- [ ] Legislative Day

**CE credits offered:**  

**Member benefit(s) offered:**  

**Agenda/Notes:**  

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**Program/Speaker:**  

### IMPORTANT DATES

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# BOARD COMMITTEE MEETING NOTES

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1. Review this month’s focus areas & determine adjustments to be reviewed next time.
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### Long-Term Care Awareness Month

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### Action Items

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### Upcoming Deadlines

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2015–2016 Best Practices — NAIFA Local Associations
**Member Benefits**

**PDP**
Publicize and hold November meeting.
Confirm arrangements for awards ceremony social event.
Promote December awards ceremony to the membership.
Promote a NAIFA Member Benefit.

**PDP-YAT**
Invite award winners to December awards ceremony social event.

**PDP-AE**
Review awards materials received from NAIFA-National to ensure that all awards have arrived and are ready for December awards ceremony.

**Advocacy**

**GR**
Read GovTalk, GovUpdate and state legislative reports and educate the membership on important legislative issues.
Encourage all members to respond to any outstanding GovAlerts that are still “live.”

**PAC-GR**
Evaluate IFAPAC fundraising results and strategize to meet contributor and contribution fundraising goals by December 31!
Track down pledges that have not been fulfilled and encourage pledgers to contribute before the end of the year.
Reference your contributor list for people who have been contributing the same amount for years and ask them to go to the next club level.
Convert annual IFAPAC givers into monthly IFAPAC givers.
Make sure that 100% of your association’s Board of Directors have contributed (at the Century club level or higher) to IFAPAC this year.

**PIC-GR**
Follow up on results of November election and identify new APIC contacts for newly elected legislators.
Support Election Day events and IFAPAC-supported candidates.

**Governance and Administration**

**P**
Review Association Annual Plan for second half of association year.

**P-NC-AE**
Hold board meeting. Review strategic plan benchmarks and action items.

**NC-P**
Provide report to association leadership and members.

**ST-P-AE**
Turn in Form 990 or Form 990-EZ to IRS by November 15.

**ST-AE**
Send out November association newsletter.

**PE-P**
Start selecting next year’s leadership team.

**NC State National Committeeperson**
participate in quarterly conference call with NAIFA National Secretary.

**Local National Committeeperson** coordinate with State National Committeeperson to recommend potential candidates for national committees and the NAIFA Board of Trustees.

**ST**
Forward your association’s $3 per capita administrative contribution to National IFAPAC.

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**“WHO’S RESPONSIBLE” KEY**

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**Program/Speaker:**

**Agenda:**

**Topic:**

Practice specialty focus: [ ] L&A  [ ] H&EB  [ ] ML  [ ] FA&I  [ ] Legislative Day

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2015–2016 Best Practices — NAIFA Local Associations

65
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<td>Last day to receive IFAPAC credit card/check contributions at NAIFA National</td>
<td>New Year’s Eve</td>
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### ACTION ITEMS

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### UPCOMING DEADLINES

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2015–2016 Best Practices — NAIFA Local Associations 67
RESPONSIBILITIES: DECEMBER 2015

Member Benefits

**PDP-YAT**
Hold awards ceremony social event.

**PDP**
Review Professional Development Calendar for second half of the year and ensure that CE credits are being offered to meet your members’ CE requirements.

Consider Programs-in-a-Box offerings.
Promote a NAIFA Member Benefit.
NAIFA Quality Awards delivered to association president or executive. Plan to distribute awards at a meeting or special event.
Promote Advisor 2020 Workshop and the NAIFA LUTCF® Designation Program

**PDP-GR**
Plan for January Association Meeting focusing on advocacy and legislative issues.

**YAT**
Start planning for March YAT event.

Advocacy

**PAC-GR-P**
As IFAPAC year-end deadline approaches, make sure that all contributions are sent to NAIFA–National prior to December 30. Contributions must be received prior to December 30 to be counted in the current year.

**PAC-GR**
Write first IFAPAC fundraising message for the new year to be published in the January association newsletter. Be sure to thank all generous donors.

**GR-PIC-PAC-P**
Focus attention on a final fundraising push to achieve IFAPAC goals.

**GR**
Verify December meetings with legislators and their staff, and share details with NAIFA colleagues.

**PIC-GR**
If it’s an election year, continue looking for APIC contacts for newly elected state legislators and Members of Congress.

**PIC-PAC-GR**
Attend APIC/IFAPAC Planning Meeting in Washington, D.C.

**PAC**
Convert annual IFAPAC contributors to monthly bank draft contributors.

Membership

**MC**
Review the membership plan.
Welcome and engage new members.
Invite current members and recently lapsed members to monthly association meeting.
Call your lapsed and those in their renewal cycle. Encourage participation in the monthly payment program and track your results in MemberNet.
Reach out to prospective members and invite them to association events and/or meetings. Create a hot prospect list and share it with NAIFA National.
Conduct agency presentations– promote Manager’s Membership Award.
Make the membership ask.

**MC-P**
Plan and hold a member recognition event for recruiters and volunteers in conjunction with association awards ceremony.

Governance and Administration

**P**
Review Association Annual Plan for second half of association year.
Appoint an IFAPAC chair and a LUTC chair for the upcoming year.

**P-ST**
Review Association Budget and make any necessary mid-year adjustments. Ensure that finances are in good order.

**ST-AE**
Prepare January association newsletter.
NC State National Committeeperson recommend potential candidates for national committees and the NAIFA Board of Trustees to the National Governance Committee.

“WHO’S RESPONSIBLE” KEY

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Program/Speaker:

**IMPORTANT DATES**

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**Agenda:**

1. Review this month’s focus areas & determine adjustments to be reviewed next time.
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**NOTES:**

**ACTION ITEMS:**

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### JANUARY 2016

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<td>New Year’s Day (NAIFA-National Closed)</td>
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<td>Kick off 50th anniversary of IFAPAC fundraising</td>
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<td>Kick off the new IFAPAC fundraising year by soliciting your non-contributors.</td>
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<td>Dr. Martin Luther King, Jr. Day (NAIFA-National Closed)</td>
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### UPCOMING DEADLINES

- Kick off 50th anniversary of IFAPAC fundraising
- Kick off the new IFAPAC fundraising year by soliciting your non-contributors.
## Member Benefits

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Action</th>
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<tbody>
<tr>
<td><strong>PDP-GR</strong></td>
<td>Publicize and hold meeting focusing on advocacy and legislative issues.</td>
</tr>
<tr>
<td><strong>PDP</strong></td>
<td>Plan and promote February meeting.</td>
</tr>
<tr>
<td><strong>PDP</strong></td>
<td>Promote NAIFA Quality Award Program.</td>
</tr>
<tr>
<td><strong>PDP</strong></td>
<td>Promote a NAIFA Member Benefit.</td>
</tr>
<tr>
<td><strong>PDP</strong></td>
<td>Promote Advisor 2020 Workshop and the NAIFA LUTCF® Designation Program.</td>
</tr>
<tr>
<td><strong>YAT</strong></td>
<td>Plan and publicize March event for YAT Awareness Month.</td>
</tr>
<tr>
<td><strong>YAT</strong></td>
<td>YAT Leader of the Year Nomination Form available – select a candidate to nominate.</td>
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## Advocacy

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td><strong>PAC-GR</strong></td>
<td>Report IFAPAC results for the prior year at the January membership meeting.</td>
</tr>
<tr>
<td><strong>PAC-GR-P</strong></td>
<td>Announce IFAPAC 50th anniversary and begin asking for IFAPAC contributions.</td>
</tr>
<tr>
<td><strong>PIC-GR</strong></td>
<td>Identify new APIC contacts for any newly elected Members of Congress (if an election year) and ensure that they are reported to NAIFA-National.</td>
</tr>
<tr>
<td><strong>PIC-GR</strong></td>
<td>Ask current APIC contacts to reaffirm commitment to APIC program. Report any changes to the state APIC chair and national APIC office.</td>
</tr>
<tr>
<td><strong>PIC-PAC-GR</strong></td>
<td>Leverage the association’s January legislative meeting for the development of new APIC contacts and IFAPAC contributors.</td>
</tr>
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## Membership

<table>
<thead>
<tr>
<th>Responsibility</th>
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<tbody>
<tr>
<td><strong>MC</strong></td>
<td>Review the membership plan.</td>
</tr>
<tr>
<td><strong>MC</strong></td>
<td>Welcome and engage new members.</td>
</tr>
<tr>
<td><strong>P</strong></td>
<td>Invite current members and recently lapsed members to monthly association meeting.</td>
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<td><strong>P</strong></td>
<td>Call your lapsed and those in their renewal cycle. Encourage participation in the monthly payment program and track your results in MemberNet.</td>
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<td><strong>P</strong></td>
<td>Reach out to prospective members and invite them to association events and/or meetings. Create a hot prospect list and share it with NAIFA National.</td>
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<td><strong>MC-P</strong></td>
<td>Conduct agency presentations—promote Manager’s Membership Award.</td>
</tr>
<tr>
<td><strong>MC-P</strong></td>
<td>Make the membership ask.</td>
</tr>
<tr>
<td><strong>MC-P</strong></td>
<td>Develop membership chair transition plan and consult with president-elect on possible candidates for next year’s membership chair.</td>
</tr>
<tr>
<td><strong>MC-P</strong></td>
<td>Finalize, plan and host Mid-Year Meeting.</td>
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## Governance and Administration

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<tr>
<th>Responsibility</th>
<th>Action</th>
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<tbody>
<tr>
<td><strong>P-AE</strong></td>
<td>Review guidelines of the Award of Excellence and track association’s progress at the mid-year mark.</td>
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<tr>
<td><strong>P</strong></td>
<td>Review Association Annual Plan for second half of association year.</td>
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<tr>
<td><strong>P</strong></td>
<td>Review with officers the revised association budget and strategic plan.</td>
</tr>
<tr>
<td><strong>P</strong></td>
<td>Prepare for February Board Meeting. Request reports from committee chairs.</td>
</tr>
<tr>
<td><strong>PE-NC</strong></td>
<td>Begin filling your “bus” with your team.</td>
</tr>
<tr>
<td><strong>P-PE</strong></td>
<td>Notify NAIFA of new IFAPAC chair.</td>
</tr>
<tr>
<td><strong>P-PE</strong></td>
<td>Notify LUTC and NAIFA of new LUTC chair.</td>
</tr>
<tr>
<td><strong>PE</strong></td>
<td>Assign LILI chair and moderator and prepare for Leadership in Life Institute for 2015-2016.</td>
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<tr>
<td><strong>PE</strong></td>
<td>Conduct a membership survey of association programs and benefits to be used during strategic planning session in March.</td>
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<tr>
<td><strong>ST-AE</strong></td>
<td>Send out January association newsletter.</td>
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### “WHO’S RESPONSIBLE” KEY

- **P** = President
- **PE** = President-elect
- **ST** = Secretary/Treasurer
- **NC** = National Committeeperson
- **AE** = Association Executive
- **MC** = Membership Chair
- **PDP** = Professional Development & Programs Chair
- **GR** = Government Relations Chair
- **PAC** = IFAPAC Chair
- **PIC** = APIC Chair
- **YAT** = Young Advisors Team Liaison
MEMBER MEETING NOTES

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Program/Speaker:
Agenda:
Topic:
Practice specialty focus: [ ] L&A   [ ] H&EB   [ ] ML   [ ] FA&I   [ ] Legislative Day
CE credits offered:
Member benefit(s) offered:
Agenda/Notes:

Lessons Learned/Notes To My Successor:

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## Member Benefits

**PDP**

Publicize and hold February meeting using NAIFA’s *Programs in a Box*.
- Plan for March Multi-line Meeting.
- Promote NAIFA Quality Award.
- Promote a NAIFA Member Benefit
- Promote Advisor 2020 Workshop and the NAIFA LUTCF® Designation Program

**YAT**

Continue to publicize Young Advisors Month in March.

## Advocacy

**PAC-GR**

Send IFAPAC fundraising solicitations to non contributors and lapsed members.

**PAC-GR-ST**

Submit list of previous year’s IFAPAC contributors for publication in the March association newsletter.

**PIC**

Contact the Federal Coordinators in your state to suggest activities and goals.

**PIC-GR**

Continue to build APIC contact system and encourage political involvement.
- Set up a meeting with a Member of Congress for spring congressional break.
- Prepare APIC contacts for State “Day at the Capital”.

**GR**

Read GovTalk and GovUpdate to keep current on legislative and regulatory issues at the state and national levels. Brief membership during March meeting and in March association newsletter. Bring attention to any outstanding GovAlerts and encourage all members to respond, if applicable.
- Encourage the leaders of your association and APIC contacts to register for NAIFA’s May Congressional Conference.

**PAC**

Prepare to host an IFAPAC booth at state annual meeting and State “Day at the Capital”.

## Membership

**MC**

Review the membership plan.
- Welcome and engage new members.
- Invite current members and recently lapsed members to monthly association meeting.
- Call your lapsed and those in their renewal cycle, Encourage participation in the monthly payment program and track your results in MemberNet.
- Reach out to prospective members and invite them to association events and/or meetings. Create a hot prospect list and share it with NAIFA National.
- Conduct agency presentations– promote Manager’s Membership Award.

**MC-PE**

Make the membership ask.

**Membership**

**MC**

Review the membership plan.
- Welcome and engage new members.
- Invite current members and recently lapsed members to monthly association meeting.
- Call your lapsed and those in their renewal cycle, Encourage participation in the monthly payment program and track your results in MemberNet.
- Reach out to prospective members and invite them to association events and/or meetings. Create a hot prospect list and share it with NAIFA National.
- Conduct agency presentations– promote Manager’s Membership Award.

**MC-PE**

Make the membership ask.

## Governance and Administration

**P**

Review *Association Annual Plan* for second half of association year.
- Hold February Association Board meeting.
- Appoint a Governance Committee to review *association bylaws* and recommend and identify association leaders to fill leadership positions to be voted on during May Association Meeting.

**PE+NC**

Continue filling your “bus” with your team, and begin promoting 100% attendance at the State Association Leadership Conference.

**PE**

Tabulate results of membership survey in preparation for the March strategic planning session.
- Begin appointing Leadership Team for next association year.

**ST+AE**

Prepare March association newsletter.
- NC State National Committeeperson participate in quarterly conference call with NAIFA National Secretary.

**P-ST**

Budget for your association’s $3 per capita IFAPAC administration contribution.

## “WHO’S RESPONSIBLE” KEY

<table>
<thead>
<tr>
<th>P</th>
<th>President</th>
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<tr>
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<td>ST</td>
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**Program/Speaker:**

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**Topic:**

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<th>FA&amp;I</th>
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# BOARD COMMITTEE MEETING NOTES

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# YAT Awareness Month

## March 2016

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**Action Items**

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**Upcoming Deadlines**

- Solicit YATs for IFAPAC contributions
- Solicit registrants to Congressional Conference for IFAPAC contributions
- Are you 1/4 of the way to your IFAPAC Goals?
Responsibilities: March 2016

Member Benefits

**PDP**
- Promote **NAIFA Quality Award** and May deadline.
- Publicize and hold March multi-line related meeting.
- Plan April Association Meeting on Financial Investments and Advising.
- Promote the NAIFA Career Conference and Annual Meeting.
- Promote a specific NAIFA Member Benefit.
- Promote Advisor 2020 Workshop and the NAIFA LUTCF® Designation Program.

**YAT**
- Hold YAT Awareness Month events. Publicize benefits of membership to potential YATs and NAIFA members.

Advocacy

**PAC**
- Obtain a list of lapsed donors from National IFAPAC Office and work to convert them to current IFAPAC contributors.

**PAC-AE**
- Ensure the IFAPAC contributor list is ready to be printed in March newsletter. Proofread it.

**PAC-GR**
- Continue to work IFAPAC fundraising strategy. Ask for contributions, ask for contributions, ask for contributions!
- Hold an IFAPAC Phon-A-Thon to enroll new IFAPAC contributors.

**YAT-PAC**
- Kick off IFAPAC Campaign during YAT Awareness Month.

**GR-PAC**
- Continue to encourage members to register for NAIFA’s May Congressional Conference.
- Solicit registrants for IFAPAC contributions.

Membership

**MC**
- Review the membership plan.
- Welcome and engage new members.
- Invite current members and recently lapsed members to monthly association meeting.
- Call your lapsed and those in their renewal cycle. Encourage participation in the monthly payment program and track your results in MemberNet.
- Reach out to prospective members and invite them to association events and/or meetings. Create a hot prospect list and share it with NAIFA National.
- Conduct agency presentations – promote Manager’s Membership Award.
- Make the membership ask.

Governance and Administration

**P-ST**
- Review Association’s budget and ensure that revenue and expenditures are tracking appropriately.

**P**
- Review **Association Annual Plan** for second half of association year.
- Prepare for April Board Meeting. Request reports from all committee chairs.

**PE-P**
- Work with Governance Committee to review association bylaws.

**ST-AE-P**
- Send March association newsletter. Include any proposed bylaws amendments and/or candidates for office to meet notification requirements per your bylaws.

**PE-NC-AE**
- Register for the NAIFA Career Conference and Annual Meeting.

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**WHO’S RESPONSIBLE** KEY

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<th>Abbreviation</th>
<th>Description</th>
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<td>President</td>
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<td>Secretary/Treasurer</td>
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<tr>
<td>NC</td>
<td>National Committee person</td>
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<td>AE</td>
<td>Association Executive</td>
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<td>Membership Chair</td>
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<td>PDP</td>
<td>Professional Development &amp; Programs Chair</td>
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<td>GR</td>
<td>Government Relations Chair</td>
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<td>PAC</td>
<td>IFAPAC Chair</td>
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<td>PIC</td>
<td>APIC Chair</td>
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<tr>
<td>YAT</td>
<td>Young Advisors Team Liaison</td>
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</table>
## Member Meeting Notes

**Date:**

**Time:**

**Location:**

**Program/Speaker:**

**Agenda:**

**Topic:**

Practice specialty focus: L&A  H&EB  ML  FA&I  Legislative Day

**CE credits offered:**

**Member benefit(s) offered:**

**Agenda/Notes:**

**Lessons Learned/Notes To My Successor:**

**Action Items:**

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**Next Meeting:**

**Date:**

**Time:**

**Location:**

**Program/Speaker:**

## Important Dates

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**Agenda:**

1. Review this month’s focus areas & determine adjustments to be reviewed next time.
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**NOTES:**

**ACTION ITEMS:**

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**NEXT MEETING:**

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APRIL 2016

SUNDAY    MONDAY    TUESDAY    WEDNESDAY    THURSDAY    FRIDAY    SATURDAY

1 2

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10 11 12
Tax Day

13 14 15 16

17 18 19 20 21 22 23

24 25 26
Solicit all association leaders for their IFAPAC Contributions

27 28 29 30
Promote, visit, and graduate from The NAIFA Online Leadership Academy

ACTION ITEMS

Who    When    What

UPCOMING DEADLINES
RESPONSIBILITIES: APRIL 2016

Member Benefits

PDP
Promote NAIFA Quality Award and advertise the mid-May application deadline.
Promote and hold April Association Meeting on Financial Investments and Advising.
Prepare for May Meeting.
Promote a NAIFA Member Benefit.
Promote the NAIFA Career Conference and Annual Meeting.
Promote Advisor 2020 Workshop and the NAIFA LUTCF® Designation Program

LILI
Promote LILI Program and encourage candidate applications.

YAT-PDP
Recap activities for YAT Awareness Month and send to yat@naifa.org
Meet with other NAIFA leadership to plan for programs in the coming year.

YAT
Submit nomination for the YAT Leader of the Year award.

Advocacy

PAC
Recognize all IFAPAC Contributors during May Association Meeting.

PAC-GR-PIC
Review list of APIC contacts and ensure that all contacts are current IFAPAC contributors. Solicit those who are not also IFAPAC contributors.

PAC-GR-P
Follow-up with all association board members to ensure that all have contributed at the Century level or higher.

PIC-GR-P
Invite all APIC contacts to May Meeting and recognize them as important members of the Advocacy Team.

PIC-GR
Prepare APIC contacts for State “Day at the Capital.”

PAC
Ask for contributions!

PAC-GR-PIC
Promote May 2016 Congressional Conference

PAC
Continue to solicit Congressional Conference registrants.

Membership

MC
Review the membership plan.
Welcome and engage new members.
Invite current members and recently lapsed members to monthly association meeting.
Call your lapsed and those in their renewal cycle. Encourage participation in the monthly payment program and track your results in MemberNet.
Reach out to prospective members and invite them to association events and/or meetings. Create a hot prospect list and share it with NAIFA National.
Conduct agency presentations– promote Managers Membership Award.
Make the membership ask.

MC-PE
Work with president-elect and implement incoming membership chair transition plan.

Governance and Administration

P
Review Association Annual Plan for second half of association year.
Hold board meeting.

PE
Finish appointing Leadership Team for next association year.
Make plans to attend the State Presidents-elect Conference as well as the State Association Leadership Conference (contact state office for details).
Work with association president on the preparation of next year’s association budget.

ST-AE
Prepare May association newsletter.
Promote, visit, and graduate from The NAIFA Online Leadership Academy

WHO’S RESPONSIBLE” KEY

P = President
PE = President-elect
ST = Secretary/Treasurer
NC = National Committeeperson
AE = Association Executive
MC = Membership Chair
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YAT = Young Advisors Team Liaison
## MEMBER MEETING NOTES

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**Program/Speaker:**

**Agenda:**

**Topic:**

Practice specialty focus: L&A, H&EB, ML, FA&I, Legislative Day

CE credits offered:

Member benefit(s) offered:

Agenda/Notes:

Lessons Learned/Notes To My Successor:

### ACTION ITEMS:

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Program/Speaker:

### IMPORTANT DATES

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APRIL 2016
**BOARD COMMITTEE MEETING NOTES**

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**Agenda:**

1. Review this month’s focus areas & determine adjustments to be reviewed next time.
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**ACTION ITEMS**

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**UPCOMING DEADLINES**

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<td>NAIFA Quality Award application deadline</td>
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<td>Memorial Day (NAIFA-National Closed)</td>
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RESPONSIBILITIES: MAY 2016

Member Benefits

PDP-YAT  Hold YAT event.
PDP  Publicize and hold May Association Meeting.
Promote a NAIFA Member Benefit.
Promote the NAIFA Career Conference and Annual Meeting.
Promote Advisor 2020 Workshop and the NAIFA LUTCF® Designation Program
P-PDP  Prepare for June Association Meeting and installation of new officers.

Advocacy

PAC-GR  Conduct an IFAPAC Phon-A-Thon.
PAC-AE  List IFAPAC contributors for the current year in the July association newsletter and recognize current year contributors at the May Association Meeting. Show the Mike Dunn or Terry Headley video at the meeting and encourage new contributions.
PAC-ST  Follow-up with president-elect and secretary/treasurer regarding the association’s contribution to the IFAPAC administrative fund.
PAC-P  Evaluate. Is your association meeting its fundraising objectives? Are you on track to make your fundraising goals by December 31?
PAC  Solicit all monthly bank draft contributors to increase to the next level.
ALL  Attend Congressional Conference.

Membership

MC  Review the membership plan.
Welcome and engage new members.
Invite current members and recently lapsed members to monthly association meeting.
Call your lapsed and those in their renewal cycle. Encourage participation in the monthly payment program and track your results in MemberNet.
Reach out to prospective members and invite them to association events and/or meetings. Create a hot prospect list and share it with NAIFA National.
Conduct agency presentations – promote Managers Membership Award.
Make the membership ask.

Governance and Administration

P  Review Association Annual Plan for second half of association year.
Hold closing board meeting.
Hold annual business meeting in conjunction with the May association meeting including voting on new leadership team as well as any bylaws changes/amendments.
P-AE  Begin to prepare application for the NAIFA Jack E. Bobo Award of Excellence.
PE  Begin leadership transition with new association leadership team.
Continue to develop new association budget.
Conduct Association Annual Planning Session. Invite current leadership team as well those who will be considered for leadership positions during the next association year. Use survey results in meeting.
PE-NC-AE  Review action items for the association’s strategic plan.
ST-AE  Send May association newsletter.
NC  State National Committeeperson participate in quarterly conference call with NAIFA National Secretary.

“WHO’S RESPONSIBLE” KEY

P  = President
PE  = President-elect
ST  = Secretary/Treasurer
NC  = National Committeeperson
AE  = Association Executive
MC  = Membership Chair
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GR  = Government Relations Chair
PAC  = IFAPAC Chair
PIC  = APIC Chair
YAT  = Young Advisors Team Liaison

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## MEMBER MEETING NOTES

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**Program/Speaker:**

**Agenda:**

**Topic:**

Practice specialty focus:  
- [ ] L&A  
- [ ] H&EB  
- [ ] ML  
- [ ] FA&I  
- [ ] Legislative Day

**CE credits offered:**

**Member benefit(s) offered:**

**Agenda/Notes:**

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**Lessons Learned/Notes To My Successor:**

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**Program/Speaker:**

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### IMPORTANT DATES

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1. Review this month’s focus areas & determine adjustments to be reviewed next time.

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NEXT MEETING:

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<td>Last day of the Membership Year</td>
<td>Officer &amp; Chair Reporting DUE</td>
<td>LILI Moderator Applications Due</td>
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<td>30</td>
<td>Are you 1/2 way to your IFAPAC Goals?</td>
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### ACTION ITEMS

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### UPCOMING DEADLINES

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**RESPONSIBILITIES: JUNE 2016**

**Member Benefits**

**PDP-P**
Hold June Association Meeting and Installation of Officers.

Coordinate with state LILI chair to promote a Leadership in Life Institute (LILI) program.

Promote a NAIFA Member Benefit.

Promote the NAIFA Career Conference and Annual Meeting.

Promote Advisor 2020 Workshop and the NAIFA LUTCF® Designation Program.

**Advocacy**

**PAC-GR**
Continue IFAPAC fundraising for IFAPAC 50th Anniversary.

**PAC-PE**
In the case of a transition in IFAPAC chair or government relations chair, create a mid-year transition plan to ensure fundraising efforts continue.

**PAC-GR-PE**
Reach out to new officers and committee chairs to ensure that all are IFAPAC contributors at the Century level or greater.

**PIC-GR**
Personally thank all APIC contacts for their continued service to NAIFA. Introduce new APIC state chair for new association year, if applicable.

**GR**
Brief new government relations chair on legislative and regulatory issues and resources available to track legislation.

**PAC**
Ask for contributions.

**Membership**

**MC-P**
Review the membership plan.

Welcome and engage new members.

Invite current members and recently lapsed members to monthly association meeting.

Call your lapsed and those in their renewal cycle. Encourage participation in the monthly payment program and track your results in MemberNet.

Reach out to prospective members and invite them to association events and/or meetings. Create a hot prospect list and share it with NAIFA National.

Conduct agency presentations—promote Manager’s Membership Award.

Make the membership ask.

**AE-MC-P**
Membership year ends June 30.

Contact all of your lapsed members and ask them to renew before June 30.

**Governance and Administration**

**P**
Review Association Annual Plan for second half of association year.

Apply for the Jack E. Bobo Award of Excellence by July 8.

**PE**
Assign committee chairs and appoint committees.

Review Membership Procedures Guide, noting the responsibilities of various members of the executive committee—the president, secretary/treasurer, membership chair, national committeeperson and the association executive.

Contact state association for plans for the State Association Leadership Conference.

Review proposed association budget with new leadership team.

**PE-NC-AE**
Register for NAIFA Career Conference and Annual Meeting.

**PE-ST-AE**
Make sure officers and committee chairs have been reported to the State Office before the June 30 deadline.

Submit to NAIFA dues update form by July 31.

**ST**
Prepare end of year wrap-up newsletter articles for July issue.

**ST-AE**
Prepare July association newsletter with new leadership team.

**NC**
Plan leadership development program and assist president-elect on plans for Board and Committee Chair Orientation.

**PE-NC**
Review and monitor action items from association’s strategic plan.

Apply for the Jack E. Bobo Award of Excellence by July 8.

Meet with next year’s chair to assist them in planning for the upcoming year.
## MEMBER MEETING NOTES

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</tbody>
</table>

**Program/Speaker:**

**Agenda:**

**Topic:**

**Practice specialty focus:** [ ] L&A  [ ] H&EB  [ ] ML  [ ] FA&I  [ ] Legislative Day

**CE credits offered:**

**Member benefit(s) offered:**

**Agenda/Notes:**

**Lessons Learned/Notes To My Successor:**

### ACTION ITEMS:

<table>
<thead>
<tr>
<th>Who</th>
<th>When</th>
<th>What</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

### NEXT MEETING:

<table>
<thead>
<tr>
<th>Date:</th>
<th>Time:</th>
<th>Location:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

**Program/Speaker:**

### IMPORTANT DATES

1.  
2.  
3.  
4.  
5.  

## “WHO’S RESPONSIBLE” KEY

<table>
<thead>
<tr>
<th>P</th>
<th>PE</th>
<th>ST</th>
<th>NC</th>
<th>AE</th>
<th>MC</th>
<th>PDP</th>
<th>GR</th>
<th>PAC</th>
<th>PIC</th>
<th>YAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>President-elect</td>
<td>Secretary/Treasurer</td>
<td>National Committeeperson</td>
<td>Association Executive</td>
<td>Membership Chair</td>
<td>Professional Development &amp; Programs Chair</td>
<td>Government Relations Chair</td>
<td>IFAPAC Chair</td>
<td>APIC Chair</td>
<td>Young Advisors Team Liaison</td>
</tr>
</tbody>
</table>
# Parliamentary Procedure at a Glance

**To Do This:**

**You Say This:**

<table>
<thead>
<tr>
<th>Action</th>
<th>You Say This</th>
<th>May I Interrupt the Speaker?</th>
<th>Do I Need a Second?</th>
<th>Is It Debatable?</th>
<th>Can It Be Amended?</th>
<th>What Vote Is Needed?</th>
<th>Can It Be Reconsidered?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjourn Meeting</td>
<td>“I move that we adjourn.”</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>MAJORITY</td>
<td>NO</td>
</tr>
<tr>
<td>Call an Intermission</td>
<td>“I move that we recess for...”</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
<td>MAJORITY</td>
<td>NO</td>
</tr>
<tr>
<td>Complain about Heat, Noise, Etc.</td>
<td>“I rise to a question of privilege.”</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO VOTE</td>
<td>NO (usually)</td>
</tr>
<tr>
<td>Temporarily Suspend Consideration of an Issue</td>
<td>“I move to table the motion.”</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>MAJORITY</td>
<td>NO</td>
</tr>
<tr>
<td>End Debate and Amendments</td>
<td>“I move the previous question.”</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>2/3</td>
<td>NO 1</td>
</tr>
<tr>
<td>Postpone Discussion for a Certain Time</td>
<td>“I move to postpone the discussion until...”</td>
<td>NO</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>MAJORITY</td>
<td>YES</td>
</tr>
<tr>
<td>Give Something Closer Study</td>
<td>“I move to refer the matter to committee.”</td>
<td>NO</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>MAJORITY</td>
<td>YES 2</td>
</tr>
<tr>
<td>Amend a Motion</td>
<td>“I move to amend the motion by...”</td>
<td>NO</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>MAJORITY</td>
<td>YES</td>
</tr>
<tr>
<td>Introduce Business</td>
<td>“I move that...”</td>
<td>NO</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>MAJORITY</td>
<td>YES</td>
</tr>
</tbody>
</table>

**Notes:**

1. Unless vote on question is not yet taken
2. Unless the committee has already taken up the subject
3. Only if the motion to be amended is debatable
4. Except in doubtful cases
5. A majority vote in negative needed to reverse ruling of chair
6. A 2/3 vote in negative needed to prevent main motion consideration
7. Only if the main question or motion was not considered
8. Only if motion to be reconsidered is debatable

---

**The motions listed above are in order of precedence. The motions below are in no particular order.****
The NAIFA Online Service Center is a web based system that allows you to access essential information to assist with the data management needs of your association.

**Features include...**

- The ability to view up to date membership numbers, including current, lapsed, renewed, and new...
- Easily create a current, lapsed or new member report in Excel, PDF or Screen display...
- Update your members contact information in real time...
- Send a broadcast email to your membership...
- Access your associations archived disbursement reports...
- Easy access to NAIFA’s online National Reporting systems such as Officer & Chair Reporting, Dues and Data update and Delegate reporting...
- Direct access to the NAIFA MemberNet system which assists you in your membership recruitment and retention efforts...

To access the NAIFA Online Service Center, log in to the Association Leaders & Staff Resources section on NAIFA’s website and click on Online Service Center from the drop down menu or visit securex.naifa.org/nosc

A User Guide is available on the Service Center home page.

Questions or Comments? Contact OSC@naifa.org
How to Use NAIFA’s Legislative Action Center

For more detailed instructions, see www.NAIFA.org/advocacy/advocacyonline.cfm

www.capwiz.com/naifa

Contact information for federal and state elected officials

Information Available for:
- Your U.S. Senators
- Your U.S. Representative
- Your Governor
- Your State Legislators

Sample Information on Legislators (House of Representatives Shown)

Issues and Legislation
Important issues, recent votes, current legislation, and more. Click here.

Federal bills NAIFA is watching

Updates on current GovAlerts

Take Action!
To amend title XXVII of the Public Health Service Act to preserve consumer and employer access to licensed independent insurance producers.

Enter your zip code for information regarding your Federal and State Legislators

Staff List
Legislator Bio
District Office Information
Committee Assignments also available (not shown)
How to Complete a NAIFA GovAlert

For more detailed instructions, see www.NAIFA.org/advocacy/advocacyonline.cfm

www.capwiz.com/naifa

Send your message by email or print it out to mail it yourself

Use prewritten text or write your own message

Complete your contact information (required)

Send your message with one click

www.capwiz.com/NAIFA
The online application is a wonderful resource to help your association plan and track your association’s progress throughout the entire membership year by answering questions as you complete each goal. The online capabilities allow you to both attach your supporting documentation and type in your answers. It also allows your association to save their progress and observe points as they are accrued through the course of the year. When the July 8, 2015, deadline approaches, your application should already be complete and all you have to do is click on the submit application tab and you are finished. It’s that easy!

To create a new application account, please visit www.naifa.org/leaders-staff/federation-awards. You will need to create an account for your association. Once you have created your account, you may share the account information with other leaders of your association so you are not the only person working on the application during the year. This also allows everyone to see the progress that your leadership team is making as you all work together to complete each goal. It also helps keep your team accountable.

When the July 8th deadline to submit applications arrives, your association will have two choices. You may submit your application online or submit a hard copy in a binder. It is very important to note that if you submit your application online, you will NOT be allowed to submit additional documentation via mail. **Either complete the application in its entirety online or submit a hard copy in a binder.** If your association chooses to submit a hard copy, you may still use the online application to guide you throughout the year and then print out all of the information that you have saved. Then organize it in a binder and include any additional information that you were not able to fully complete online.

If you have any questions about the award or experience any problems with the application process, please contact BoboAward@naifa.org
NAIFA’s design team will customize the NAIFA “triangle logo” for your state or local association at no charge. We aim to:

- Provide local and state associations with a professional logo suitable for use on their web sites, letterheads, business cards and promotional materials
- Promote consistent branding nationally for the NAIFA federation
- Help local and state associations comply with the bylaws

Frequently Asked Questions

How do I request a free logo for my local or state association?

Simply email your request to pubjobs@naifa.org. Please provide your association’s complete name.

How long does it take?

We are usually able to provide your logos in two to three business days.

What file types do you provide?

- We will email you three different file types for each logo:
  - a .jpeg (best for use on web pages and in emails)
  - a .tiff (for use on printed materials like letterhead and newsletters)
  - an .eps (some commercial printers and professional designers will request this type of file)
- If you require a different file type, we may be able to provide it. Simply note the type of file you need in your email request or call Mark Briscoe at 703-770-8111.

What is the Pantone Matching System (PMS) number for the NAIFA logo?

“NAIFA Blue” is PMS 293.

Can NAIFA-National design graphics or logos for my association web page, state convention, local meeting, advertisements or promotional materials?

Yes! Our professional design team will work with you to create effective advertisements, web graphics, brochures and other materials for NAIFA’s local and state associations. Design charges of $60 per hour apply.

For more information, contact us at pubjobs@naifa.org or call NAIFA Graphics at 703-770-8100
Budget & Finances for Associations

Developing a Budget

A budget is essential to managing your association, and the treasurer should work with the executive committee and staff to develop your annual budget. It is an important management tool and shows the members how their dues dollars are being spent. You should continue to review and update your budget throughout the year to pinpoint variances and trends.

Creating a budget begins with listing the activities and goals of the association, but it also includes a careful evaluation of the association’s sources of income. Review the current year’s projected revenue vs. actual revenue and plan accordingly. It is prudent to budget for conservative membership numbers. If your planned expenditures will exceed your projected income, it may be necessary to: raise income by increasing dues, or generating non-dues sources; or cutting back on your planned activities.

When your leadership team meets, discuss their ideas and estimate the costs of executing them. Agree to a final list of objectives and create a budget by assigning appropriate dollar amounts to each budget item.

If your association has adopted the “Model Bylaws,” then the budget must be approved by your association’s board of directors no later than July 15. It then becomes the president’s responsibility to ensure the other officers, committee chairs and staff work within the budget.

The treasurer should deliver a monthly financial report to the Board. The monthly financial report should show income and expenses for the month and for the fiscal year to date, compared to the Budget and to the same month in the previous year.

Managing Association Funds

All association funds should be deposited in a local bank account in the name of the association. Even though the account may be small, it is important that it be kept completely separate from any personal or business account of the treasurer.

Typically, an association names two officers with check signing authority, and both signatures will be required on all checks by the association.

It is a good practice to deposit all money received daily. To take care of small cash expenditures, a petty cash fund may be kept on hand and replenished occasionally from the treasury.

If the association is incorporated, a corporate resolution must be passed to change the signatures. Board action is required to accomplish this regardless of corporate status. Your bank will advise you on the appropriate form of resolution.

Handling Cash Received

Any checks received should be endorsed and a bank deposit slip prepared, listing in detail the checks received and showing the total amount of checks and cash to be deposited. All funds should be deposited the same day as received, if possible.

Once the monies are deposited into the bank account, they are entered in the accounting system. Enter the date the checks were deposited and also the distribution (allocation) to the proper income account.

Credits received directly into the bank account should be recorded into the accounting system as well.

Recording Cash Disbursements

For invoices which are paid by check, the invoice number, date, amount and terms are entered into an accounting software system, with the amount charged to the correct account (usually an expense account) and a brief description entered. Depending on your procedures, checks are cut at least once a week.

Wire transfers and automatic debits to the bank account are entered via a journal entry into the accounting system.
Reconciling the Association’s Bank Balance

Reconciling bank statements with association financial records is done in order to make certain that the cash balance in the accounting system is in agreement with your account at the bank. It is suggested that the bank reconciliation be prepared as soon as possible after receipt of the bank statement.

The first step is to compare the checks recorded in the cash detail ledger to the checks that cleared the bank during the month per the bank statement. Then compare any checks listed as outstanding in the prior month’s bank reconciliation to the checks that cleared the bank during the month per the bank statements. Any checks that did not clear the bank are listed as outstanding on the reconciliation.

The next step is to compare cash receipts recorded in the cash detail ledger to the deposits/debits on the bank statements. Any deposit made close to month end that has not shown up on the bank statement is listed as outstanding on the reconciliation. Any deposits shown as outstanding on the prior month’s reconciliation should appear as a deposit on the bank statement. If not, the deposit should be investigated. Any other various charges or credits shown on the bank statements but not recorded in your cash account or vice versa must also be taken into consideration.

It is a good plan to keep a file, either manual or electronic, of each month’s bank reconciliation. In addition, keep all bank statements together arranged by month for future reference.

Preparing for an Audit

Just as it is important to prepare an association budget at the beginning of the year, a financial statement should be reported for your association and should be distributed to members along with the annual report of the president. In this way, the members will not only have a constant check on the association’s finances, but they will understand the effectiveness of the present dues system. Therefore, if a suggestion is made to increase dues, their members may be more ready to accept the increase and have a better understanding of the financial information. If the funds are substantial, it may be advisable to engage a CPA with non-profit experience to prepare the year-end financial statement. In any case, it is critical that you check your bylaws to determine if a certified audit is required at year-end, or if a financial review is acceptable. Many associations find that a certified audit is necessary only every couple of years (i.e. every third year) and a financial review is appropriate for the other years. This is certainly acceptable as long as the provision is allowed in your bylaws. By no means should the current board, or current secretary/treasurer actually conduct the year end financial audit or review. It should be conducted by an independent accountant.

Noting the Status of Contractor Employee

An issue that has become more and more problematic for state and local associations is the treatment of staff as an independent contractor or employee. The distinction is very important to tax treatment and ignoring this issue has placed several associations in severe financial difficulty. At a minimum, the classification will determine whether the staff receives a 1099 statement or W-2 Form at the end of the year. Please consult with your independent CPA on this critical issue.
## Association and Industry Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tbody>
<tr>
<td>AALU</td>
<td>Association for Advanced Life Underwriting</td>
</tr>
<tr>
<td>AEAC</td>
<td>Association Executives Advisory Council</td>
</tr>
<tr>
<td>ACLI</td>
<td>American Council of Life Insurers</td>
</tr>
<tr>
<td>APIC</td>
<td>Advisors Political Involvement Committee</td>
</tr>
<tr>
<td>ASAE</td>
<td>American Society of Association Executives</td>
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<tr>
<td>AT</td>
<td>NAIFA’s Advisor Today Magazine</td>
</tr>
<tr>
<td>CAE</td>
<td>Certified Association Executives (credential awarded to Association Executives)</td>
</tr>
<tr>
<td>CE</td>
<td>Continuing Education (credits necessary for agents’ licenses)</td>
</tr>
<tr>
<td>CEBS</td>
<td>Certified Employee Benefits Specialist</td>
</tr>
<tr>
<td>CFP</td>
<td>Certified Financial Planner</td>
</tr>
<tr>
<td>ChFC</td>
<td>Chartered Financial Consultant</td>
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<tr>
<td>CLU</td>
<td>Chartered Life Underwriter</td>
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<tr>
<td>COA</td>
<td>Committee on Associations</td>
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<tr>
<td>CPCU</td>
<td>Chartered Property and Casualty Underwriter</td>
</tr>
<tr>
<td>FLMI</td>
<td>Fellow Life Management Institute</td>
</tr>
<tr>
<td>FSS</td>
<td>Financial Services Specialist</td>
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<tr>
<td>GAMA</td>
<td>GAMA International (General Agents and Managers Association)</td>
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<tr>
<td>IFAPAC</td>
<td>Insurance and Financial Advisors Political Action Committee</td>
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<tr>
<td>IIABA</td>
<td>Independent Insurance Agents and Brokers of America (or the Big I)</td>
</tr>
<tr>
<td>LAMP</td>
<td>Life Agency Management Program (GAMA Annual Conference)</td>
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<tr>
<td>LIFE</td>
<td>Life and Health Insurance Foundation for Education</td>
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<tr>
<td>LILI</td>
<td>Leadership in Life Institute (NAIFA Program)</td>
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<tr>
<td>LIMRA</td>
<td>Life Insurance Marketing and Research Association</td>
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<tr>
<td>LNL</td>
<td>Listen and Learn Tours</td>
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<tr>
<td>LUTC</td>
<td>Life Underwriting Training Council</td>
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<tr>
<td>LUTCF</td>
<td>Life Underwriting Training Council Fellow</td>
</tr>
<tr>
<td>MDRT</td>
<td>Million Dollar Round Table</td>
</tr>
<tr>
<td>MSC</td>
<td>Member Service Center (NAIFA Member Service Center)</td>
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<tr>
<td>MSFS</td>
<td>Master of Science in Financial Services</td>
</tr>
<tr>
<td>NAIC</td>
<td>National Association of Insurance Commissioners</td>
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<tr>
<td>NAIFA</td>
<td>National Association of Insurance and Financial Advisors</td>
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<tr>
<td>NQA</td>
<td>NAIFA Quality Award (Conferred by NAIFA)</td>
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<tr>
<td>OLTC</td>
<td>Online Leaders Training Center</td>
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<tr>
<td>OSC</td>
<td>Online Service Center</td>
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<tr>
<td>REBC</td>
<td>Registered Employee Benefits Consultant</td>
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<tr>
<td>RHU</td>
<td>Registered Health Underwriter</td>
</tr>
<tr>
<td>WIFS</td>
<td>Women in Insurance and Financial Services</td>
</tr>
<tr>
<td>YAT</td>
<td>Young Advisors Team (NAIFA Program)</td>
</tr>
</tbody>
</table>