



**IT PAYS TO
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NAIFA Member Benefits

The Top 8 You Didn't Know You Had

Michael T. Smith, LUTCF

**Chair of the NAIFA Member Benefits
Committee**



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NAIFA Member Benefits

NAIFA member benefits provide the resources you need to succeed, at any stage in your career. NAIFA offers more than 50 professional programs and products designed to enhance your skills and provide you with value-added services.



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NAIFA Member Benefits

NAIFA resources include:

- Professional Designations
- Continuing Education
- Sales and management training
- Award recognition programs
- Networking opportunities



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NAIFA Member Benefits

But with all these, how do you choose which program, product or service is right for you?

Today, we'll focus on the Top 8 member benefits you might not know you had available to you... just by being a member of NAIFA.



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NAIFA LUTCF

For years, the NAIFA LUTCF program was administered on behalf of NAIFA by the American College. As of July 1, 2015, that partnership is ending and NAIFA will re-launch a new program – NAIFA LUTCF.



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What is NAIFA LUTCF?

NAIFA has entered into a new partnership with the College of Financial Planning to relaunch this program.



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NAIFA LUTCF Program Highlights

- A new curriculum delivered through a state-of-the-art, instructor-led, live webinar platform
- An interactive approach that will enhance the student's experience and encourage program participation



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NAIFA LUTCF Program Highlights

- Robust field training that puts classroom training into practice
- Program offerings that covers all four practice specialties: life insurance and annuities, health and employee benefits, multiline and financial advising and investments



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NAIFA LUTCF

Details on the new program will be unveiled in September 2014. Registration starts after January 1, 2015 with classes scheduled to begin July 2015.



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“The LUTCF designation is one of NAIFA’s crown jewels and a defining credential for agents, advisors and brokers. NAIFA is committed to helping members grow their business, and the re-launch of a 21st century LUTCF program helps NAIFA advance our mission by meeting the needs of today’s active agents in an increasingly competitive marketplace. Informed insurance professionals in the field help bring financial security to America’s families and businesses.”

- NAIFA CEO Dr. Susan Waters, CAE



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NAIFA Online CE with RegEd

NAIFA members may take advantage of online continuing education with industry-leading CE provider, Reg-Ed.

RegEd



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NAIFA Online CE with RegEd

- 24/7 access to more than 300 courses
- Includes firm element, PACE and ClearCert certified LTC partnership training
- Free annuity training through the RegEd and IRI Annuity Training Platform and State Insurance CE programs.



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NAIFA Online CE with RegEd

Two options are available to NAIFA Members at discounted prices:

Per course option: Members pay \$9.95 per course

Unlimited: Members pay \$29.95 for unlimited courses for one full year



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NAIFA Online CE with RegEd

For more information, visit

www.naifa.org/benefits/prof_programs/onlineCE.cfm

or call 800-392-6387.



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NAIFA Webinars

Members may take advantage of FREE, members-only monthly webinars featuring timely information and training on such topics as sales, prospecting, marketing, practice management and legislative updates.



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NAIFA Webinars

Look for information under the “*What’s New*” section of the NAIFA website, registration emails, or visit

www.naifa.org/benefits/speaker_center/webinars/

(If you miss one, don’t worry. All webinars are archived on the NAIFA website at the weblink above.)



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NAIFA ClientCast®

NAIFA ClientCast® is a **FREE** NAIFA member benefit. Available to NAIFA Members is **NAIFA ClientCast®**, an audio podcast for your clients and **Power Session LIVE™** a webinar for you, the NAIFA professional.



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NAIFA ClientCast®

NAIFA ClientCast® is designed to touch your clients and prospects monthly with audio content that motivates them to take action with you. It will generate leads, referrals and deliver clients that are ready to make buying decisions.



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NAIFA ClientCast®

Power Session LIVE™ webinars provide tools, best practice ideas, and sales strategies to use in your practice. Learn best practices ideas and sales strategies from the nation's leading business experts to propel your business to new levels of success!



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“I am a huge fan. We send it out every month to our clients and prospects, and we receive a lot of positive feedback. One podcast on life insurance helped me write \$30,000 of whole life premium.”

– Adam Solano, NAIFA Member, Illinois



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The NAIFA Quality Award

The NAIFA Quality Award provides advisors - at any stage in their career - the opportunity to demonstrate a commitment to their profession, level of production, adherence to the NAIFA Code of Ethics and exceptional service.





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The NAIFA Quality Award

This award is the mark of distinction to be recognized not only by your colleagues but by your clients and companies. Applications are being accepted now until May 30, 2014. Visit

www.naifa.org/benefits/awards/quality.cfm



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Leadership in Life Institute (LILI)

The NAIFA Leadership in Life Institute (LILI) develops leaders by fostering personal growth, enhancing business practices and developing skills necessary for effective leadership.



**LEADERSHIP
IN LIFE INSTITUTE.**



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Leadership in Life Institute(LILI)

This six month leadership development program is devoted to advancing your personal growth and professional success. Since the inception of LILI in the year 2000, more than 2,300 NAIFA members have graduated from the program.



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Leadership in Life Institute (LILI) Course Offerings

- The best in leadership and personal-development thinking
- Tools to improve your practice and create a business plan
- Increased understanding of one's self
- Expanded professional networking opportunities



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“NAIFA has given me a wonderful sense of camaraderie in the industry, not to mention some great sales ideas! The ‘highlight’ of my NAIFA membership is the Leadership in Life Institute curriculum. I look forward to many successful years of serving NAIFA and spreading the word about the benefits of being a NAIFA member!”

- Elizabeth A. Valenti, Texas, NAIFA Member



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For more information on LILI programs in your state, visit the NAIFA website at www.naifa.org/lili



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NAIFA Virtual Library

The NAIFA Virtual Library is the single most comprehensive, user-friendly online resource tool that supports an agent or advisor regardless of his/her practice specialty or career level.



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NAIFA Virtual Library

NAIFA members have **FREE** unlimited access to this online library that includes fact finders, specimen documents, concept pages, business tips, a target lead generator, a rate indicator and tax tables.



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NAIFA Virtual Library

NAIFA members may choose to purchase the upgraded version which includes additional tools, such as calculators, for a discounted rate of \$19.95.

Visit www.naifa.org/benefits/vsa/ for more information.



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E&O Coverage With CalSurance

Errors and Omissions (E&O) coverage is a must. If you don't have a policy, you need to get one. And through the NAIFA Endorsed E&O Program with CalSurance, members have multiple coverage benefits and customizable coverage options from a top rated carrier. This program is available to individuals and agencies.



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NAIFA Endorsed E&O Coverage Benefits

- Competitive Rates
- Individually Underwritten Policies
- Prior Acts Coverage & Optional Extended Reporting Period
- Multiple Limit & Deductible Options



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Professional Services Covered

- Life Insurance, Including Variable Life Insurance Products
- Annuities, Including Variable Annuity Products
- Accident & Health Insurance, Including Long Term Care and Disability Insurance
- Optional Endorsements for Financial Products, Mutual Funds, Property & Casualty



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E&O Coverage with CalSurance

NAIFA Members may also save 10% on their annual premium for the next three years upon completion of the online risk management/loss control seminar. This seminar is located on the NAIFA website on the following URL:

www.naifa.org/benefits/prof_programs/online.cfm



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“I know we have a lot of individuals in our local association that use the E&O coverage because they are independents and that’s important because it is one of those things that you can go out and get on your own, and know that it is a quality product with a quality company. I had a friend of mine who came out of the home office and joined NAIFA specifically because of the E&O.”

- Kevin Bell, CLU, ChFC, JD
NAIFA Member, Indiana



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For more information about these valuable NAIFA Member Benefits, visit www.naifa.org/benefits, contact the NAIFA Professional Development and Education Department at 703-770-8100, or get a copy of the *NAIFA Member Benefits Guide*... it tells the story of why it pays to be a member.

