



NAIFA

2030 STRATEGIC PLAN

2026 BUSINESS IMPLEMENTATION PLAN

HARNESSING THE POWER
OF COLLABORATION AND INNOVATION

A MESSAGE FROM THE CEO



In 2025, NAIFA completed the first year of our Business Implementation Plan for the 2030 Strategic Plan, laying important groundwork as a unified organization and building the momentum we now carry into 2026. In the wake of our historic merger with Life Happens and the Society of Financial Service Professionals (FSP), we proved that by working together across advocacy, professional development, membership, communications, and consumer outreach, we can deliver extraordinary value to our members and the profession.

In 2026, we build on that momentum with an even more collaborative, task force–driven approach to implementing our Business Implementation Plan. At the enterprise level, this model unites Business Development, Government Relations, Membership & Chapter Services, Communications & Marketing, Professional Development, Technology, and Life Happens into four cross-functional task forces. Together, these task forces will ensure that national programs and initiatives are executed with alignment, efficiency, and maximum impact, driving membership growth, revenue diversification, professional development, and unmatched advocacy strength across the country.

At the same time, our chapters are essential partners in advancing the NAIFA 2030 Strategic Plan. By delivering exceptional member experiences at the local and state level through networking, professional development, grassroots advocacy, and building a strong community, chapters make NAIFA’s mission tangible where our members live and work. Their role in recruiting, welcoming, and orienting new members, as well as amplifying our advocacy through state legislative days, “In-district” visits with lawmakers and at the Congressional Conference, and supporting the family of political action committees (PACs), ensures that NAIFA’s enterprise strategy resonates on Main Street.

The 2026 Business Implementation Plan is, therefore, both a national roadmap and a call to action for every chapter. Guided by the NAIFA 2030 Strategic Plan and fueled by the dedication of our staff, volunteers, and chapters, NAIFA will continue to protect our profession, advance our industry, and empower financial professionals to better serve American families and businesses in 2026 and beyond.

NAIFA 2030 Strategic Plan: Summary

NAIFA 2030 Strategic Plan: Strength, Impact, Awareness

NAIFA's 2030 Strategic Plan charts a bold trajectory post-merger with Life Happens and FSP, positioning the association as the leading voice for insurance and financial professionals. The plan centers on three pillars: Strength, Impact, and Awareness.

Strength

NAIFA will continue to demonstrate strength through exceptional member experiences, robust advocacy, and diversified revenue that ensures stability and growth.

Impact

NAIFA's impact will expand as we deliver high-quality programs and innovative initiatives for a wider range of financial professionals, including interdisciplinary financial professionals.

Awareness

NAIFA will remain the preeminent voice of the profession, clearly communicating its value to members, policymakers, industry leaders and stakeholders, and the public.

2026 Business Implementation Plan

In 2026, NAIFA shifts from a primarily department-centric execution model to a Task Force-driven model aligned to the NAIFA 2030 pillars of Strength, Impact, and Awareness. Four cross-functional Task Forces - Integrated Communications & Marketing, Membership Growth and Engagement, Integrated Technology, and Strategic Partnerships & Revenue - own delivery of outcomes.

Each Task Force coordinates work across Government Relations, Membership & Chapter Services, Business Development, Communications & Marketing, Professional Development, Technology, and Life Happens to ensure programs and initiatives are executed in an integrated, member-focused way.

2026 enterprise targets:

- Begin net membership growth in 2026, with goal to achieve 5% net membership growth;
- Reduce membership attrition in 2026, with goal to reduce below 10%;
- Develop and execute an enhanced recruitment and retention campaign in 2026;
- Create key messages, themes, and promotional resources to unify communication across all platforms;
- Generate \$1.5M in sponsorship and Knowledge Centers revenue;
- Generate \$1.5M in revenue through the Life Happens partnerships;
- Increase engagement rates: 25% increase among members; 100% increase among non-members;
- Define audience personas to tailor content that aligns with members' needs and career stages; and
- Evaluate technology resources to ensure the proper combination and utilization of resources for maximum efficacy and utilization across the enterprise.

NAIFA 2026 Business Implementation Plan

1) Strategic Partnerships & Revenue Task Force

Purpose: Expand reach and financial sustainability through corporate and industry partnerships, sponsorships, and aligned offerings to maximize public presence.

With Business Development as chair, the Strategic Partnerships & Revenue Task Force will focus on financial strength and external collaboration while advancing the programs, initiatives and products that fall under these key departments:

Business Development will lead corporate engagement and expand sponsorship packages while leveraging NAIFA's Knowledge Centers, Medicare and LECP Collectives and other programming and events including the Congressional Conference and FSP Institute to secure support. The Department also will schedule advocacy presentations at partner and prospect events.

Professional Development will contribute to revenue generation by partnering with sponsors for select webinars and other educational programming for members and non-members.

The Executive Office will position the CEO and senior leaders in front of industry partners and consider future partnerships and ties with other organizations.

Government Relations will integrate partners into advocacy opportunities, including NAIFA's Knowledge Centers, Congressional Conference, and specialty fly-ins, while ensuring PAC and War Chest strategies are clearly communicated.

Membership & Chapter Services will provide on-the-ground presence at industry events, strengthening sponsor visibility and reinforcing NAIFA's grassroots reach.

Life Happens will continue to be a critical revenue driver and public-facing brand through consumer awareness campaigns, co-branded company content, Life Lessons Scholarship Program, and sponsorship of its major programs.

Finance will manage the FSP Foundation as a funding source.

Chapter & Affiliates Component:

Chapters & Affiliates support sponsor visibility by engaging with partners at local events and offering grassroots touchpoints that strengthen national relationships.

2) Membership Growth and Engagement Task Force

Purpose: Define and individualize the member experience by delivering a best-in-class member journey - from onboarding through leadership - across national, state, and local touchpoints.

With Membership and Professional Development Departments serving as co-chairs, the Membership Growth and Engagement Task Force will focus on strengthening every step of the member lifecycle by advancing the programs, initiatives and products that fall under these key departments:

Membership & Chapter Services will deliver support across the 24 managed chapters and through coordination with all of our chapters through our Chapter Services Team, providing CE programs, leadership development, and renewal campaigns for all new members including those joining through the NAIFA Knowledge Centers. The Member Experience Team will manage records, payments, and inquiries, while prospecting and chapter development will drive growth and retention.

Professional Development will deliver value by aligning key programs including LUTCF, LILI, LACP, Future Leaders, the FSP Institute, and ongoing webinars to provide career-long pathways.

Business Development will streamline affinity programs and benefits that add to member value and grow revenue.

Government Relations will enhance member engagement and advance NAIFA positions with professional lobbying activities, grassroots training and advocacy programming such as the Congressional Conference, specialty fly-ins, and ongoing lobbying updates, giving members first-hand access to the policy process.

Communications & Marketing will strengthen the member experience by displaying NAIFA's impact through compelling storytelling and media and stakeholder outreach.

Life Happens will grow its robust library of NAIFA-only marketing and social media resources to help members grow their businesses.

Technology will unify the member experience by integrating software automation, building member dashboards, and consolidating LMS tools to track participation, CE credits, and advocacy actions.

Chapter & Affiliates Component:

Chapters & Affiliates will need to prioritize membership recruitment and retention by ensuring proper staffing and volunteer support of national recruitment campaigns, new member onboarding efforts, CE and programming delivery, advocacy engagement, as well as fostering local networking and leadership pipelines to engage members and drive membership value from NAIFA close to home.

3) Integrated Communications & Marketing Task Force

Purpose: Redefine communications and marketing pathways to present a clear, consistent, and compelling “One NAIFA” story that elevates advocacy leadership and influence, grows awareness, and fuels membership and revenue outcomes.

With the Membership and Communications & Marketing Departments serving as Task Force co-chairs, the Integrated Communications & Marketing Task Force will ensure all messaging reinforces NAIFA’s value to members, policymakers, industry partners and influencers, and the public. The Task Force will work together to advance the programs, initiatives and products that fall under these key departments:

Membership & Chapter Services will ensure that messaging and outreach efforts help convey NAIFA’s value proposition across all stages of the member journey, from onboarding through renewal and leadership engagement. Membership also will provide feedback loops from chapters and members to help tailor messaging and ensure campaigns resonate with the realities and successes of financial professionals nationwide.

Communications & Marketing will drive NAIFA’s voice and visibility by creating and promoting high-impact content across blogs, newsletters, social media, and Advisor Today. The team will produce flagship platforms like the NAIFA Community Report, State of NAIFA webinars, and executive presentations, ensuring members, policymakers, and industry partners consistently see NAIFA’s leadership and value in action.

Government Relations will provide policy expertise and advocacy narratives that fuel NAIFA’s messaging, highlighting the association’s leadership across federal, state, and interstate arenas. From grassroots mobilization and NAIFA PACs to regulatory and legislative engagement, Government Relations ensures members see NAIFA’s full advocacy strength at work on the issues that matter most to their businesses and clients.

Life Happens’ consumer education will be amplified through its three national awareness campaigns as well as the Real Life Stories and the Life Lessons Scholarship programs, while also supporting companies and NAIFA members with hundreds of marketing resources. It will also spearhead the implementation of social-media best practice for the broader organization.

Professional Development will serve as a key communications channel to showcase NAIFA’s expertise as the premier provider of education. Through the FSP Institute, the Journal of Financial Service Professionals, and designation pathways like LUTCF, LACP and LILI, NAIFA highlights its leadership in elevating professional standards and advancing knowledge across the industry.

Chapter & Affiliates Component:

Chapters & Affiliates amplify NAIFA’s national message by promoting content as requested, using consistent branding in local outreach, and reinforcing advocacy wins in their own communications.

4) Integrated Technology Task Force

Purpose: Review technology tools and resources to ensure NAIFA has the best tools in place, eliminate redundancies and certify that tools are fully operationalized across the enterprise.

With the Technology Department as the chair, the Integrated Technology Task Force will support the technical needs to advance the programs, initiatives and products that fall under these key departments:

Membership & Chapter Services will advise and assist as the primary manager of the database of record, assessing and evaluating data maintenance, processes, and consistency, while also executing call center processes concerning member records, payments, and inquiries.

Professional Development will roll out the unified LMS to deliver webinars, CE courses, and virtual journal access while providing tailored learning pathways.

Government Relations will lead efforts to engage, manage, and mobilize members effectively to drive meaningful public policy and comply with state and federal election laws.

Communications & Marketing will examine the NAIFA website, blogs, and other communications platforms to improve and execute integrated communications strategies.

The Technology team itself will deliver the Financial Pro Directory enhancements, unify LMS platforms across departments, and pilot emerging technologies such as AI and cloud platforms to improve operations and engagement.

Chapter & Affiliates Component:

Chapters & Affiliates help members adopt NAIFA's technology tools such as the NAIFA website tool and Financial Pro Directory by promoting their use locally and providing feedback to improve functionality.

Measurement & Reporting

Progress will be tracked through monthly dashboards reporting membership, engagement, revenue, and awareness outcomes, with quarterly updates to the Board of Trustees.

Conclusion

The 2026 Business Implementation Plan positions NAIFA to move forward with unity, purpose, and measurable results. By harnessing the power of collaboration across departments, task forces, and chapters, NAIFA will strengthen its advocacy, elevate professional development, and grow membership and revenue. Each initiative outlined in this plan advances the NAIFA 2030 Strategic Plan, ensuring that together, we continue to protect our profession, empower financial professionals, and deliver lasting impact for Main Street Americans.

