NAIFA | FSP A NAIFA Community | Life Happens. A NAIFA Community

NAIFA 2027 **Business Implementation Plan**



ALIGNING STRENGTHS, DELIVERING RESULTS

A MESSAGE **FROM THE CEO**

Kevin Mayeux, CAE



NAIFA enters 2027 focused on turning the vision of our 2030 Strategic Plan into results. Guided by our three pillars - Strength, Impact and Awareness - we have an opportunity to deliver greater value to our members, the profession, industry partners and consumers.

NAIFA's greatest strength is what we bring together: advocacy, membership and chapter engagement, professional development, industry partnerships, and consumer education through Life Happens. Our Knowledge Centers, FSP programs, Protectors - Powered by NAIFA, and initiatives such as NAIFA Community Conversations expand our ability to serve financial professionals and strengthen financial security.

The 2027 Business Implementation Plan is designed to align our capabilities across NAIFA. Through cross-communication, deeper understanding of our programs, priorities and audiences, and coordination across the enterprise, we can leverage our strengths, improve efficiency and amplify our impact.

Four enterprise priorities: Grow, Expand, Engage and Amplify, will guide our work, supported by technology, data, collaboration and operational excellence. Together, they provide a framework for moving from strategy to execution and ensuring our resources remain focused on the needs of NAIFA members.

One NAIFA. Aligned for greater impact.

FROM STRATEGY TO IMPACT

The NAIFA 2030 Strategic Plan establishes the association's long-term direction and positions NAIFA as the leading organization for insurance and financial professionals. The plan is centered on three strategic pillars:

STRENGTH

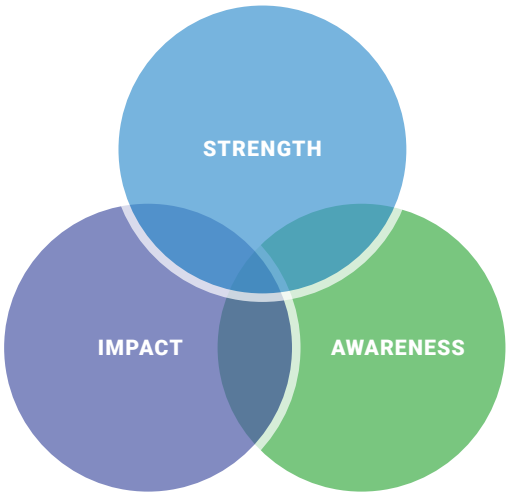
NAIFA demonstrates strength through exceptional member experiences, powerful advocacy, membership growth and diversified revenue.

IMPACT

NAIFA increases its impact by delivering high-quality programs and innovative initiatives that serve a broad community of insurance and financial professionals to help them succeed.

AWARENESS

NAIFA is the preeminent voice of insurance and financial professionals, communicating its value to members, prospective members, policymakers, industry leaders, stakeholders and consumers.



2027 Business Implementation Plan

Four enterprise priorities guide this work:

GROW	EXPAND	ENGAGE	AMPLIFY
Membership & Member Value	Partnerships, Revenue & Market Reach	Advocacy, Community & Financial Security	Awareness, Communications & Engagement

2027 ENTERPRISE TARGETS

NAIFA will measure the success of the 2027 Business Implementation Plan against a set of enterprise-level outcomes. Targets will be established in conjunction with the 2027 budget and departmental operating plans.

2027 enterprise targets:

- Begin net membership growth;
- Reduce membership attrition;
- Develop and execute an enhanced recruitment and retention campaign;
- Create key messages and resources to unify communication;
- Grow sponsorship and Knowledge Centers revenue;
- Grow revenue through the Life Happens partnerships;
- Increase engagement rates among members and non-members;
- Tailor content to align with member needs and career stages; and
- Evaluate technology resources to maximize efficacy and utilization.

GROW

Membership & Member Value

Objective

Grow and retain NAIFA membership by delivering a compelling member experience that demonstrates value at every stage of a financial professional's career.

Key Programs & Initiatives

Member Recruitment, Onboarding & Retention

Strengthen recruitment campaigns, new-member onboarding, renewal efforts and engagement. NAIFA will use improved member data to deliver relevant communications, programs and benefits while identifying where engagement can improve retention.

Advocacy as a Membership Driver

Position NAIFA's federal, state and interstate advocacy, grassroots network, Congressional Conference, advocacy training and political engagement as defining benefits of membership. Advocacy success and public policy challenges will be incorporated into recruitment, onboarding and retention messaging.

Professional Development Pathways

Connect NAIFA programs — LUTCF, LACP, LILI, FSP, the *Journal of Financial Service Professionals,* NAIFA Live, webinars and continuing education — into career pathways that encourage members to engage with NAIFA.

Knowledge Centers & Specialized Communities

Use NAIFA's Knowledge Centers and other communities to engage professionals around practice areas and emerging markets while creating pathways into broader NAIFA engagement.

Life Happens Member Value

Increase member utilization of Life Happens' consumer education materials and marketing resources as tangible benefits of NAIFA membership.

Congressional Conference and Protectors Member Experience

Leverage signature events to deliver a distinctive experience for NAIFA members and demonstrate NAIFA's value to prospective members.

Chapters & Affiliates

Chapters & Affiliates deliver the NAIFA member experience close to home. In 2027, they will support national recruitment and retention campaigns; engage new members; provide networking, continuing education and professional development; connect members to national programs; cultivate leadership pipelines; and create advocacy opportunities for members within their states.

EXPAND

Partnerships, Revenue & Market Reach

Objective

Expand NAIFA's reach and strengthen its financial sustainability through strategic partnerships, sponsorships, industry collaboration and programs that create value for members, partners and the profession. In 2027, NAIFA will take a coordinated enterprise approach to identifying, developing and maximizing these opportunities.

Key Programs & Initiatives

Protectors, Powered by NAIFA

Maximize Protectors as a major industry event bringing together producers, carriers, wholesalers, capital and platforms shaping the future of financial security. Leverage Protectors to strengthen industry relationships, recruit and engage members, showcase advocacy, deliver professional development and increase NAIFA's visibility.

Knowledge Centers & Collectives

Develop NAIFA's specialized communities to create opportunities for sponsorship, thought leadership, education, membership growth and industry collaboration. Position NAIFA as a convener around specialized markets and emerging issues.

Corporate & Industry Partnerships

Deepen relationships with carriers, distributors, financial services companies, solution providers and aligned industry organizations that support NAIFA's mission.

Integrated Sponsorship Opportunities

Coordinate sponsorship opportunities across Protectors, Congressional Conference, Knowledge Centers, professional development, advocacy and consumer outreach so industry partners can engage relevant audiences through multiple NAIFA platforms.

Life Happens Partnerships

Make Life Happens a central component of NAIFA's partnership and revenue strategy. Its consumer awareness campaigns and consumer-education resources provide distinctive platforms for companies to support financial education while reaching financial professionals and consumers.

FSP & Advanced Markets

Leverage FSP's multidisciplinary reach, educational programming, *Journal of Financial Service Professionals* and advanced-planning expertise to deepen NAIFA's relationships with professionals in complementary disciplines.

Chapters & Affiliates

Chapters & Affiliates extend NAIFA's industry relationships into state and local markets. Chapters engage corporate partners in local programs, support national sponsors, identify partnership opportunities and provide local touchpoints that strengthen national relationships.

ENGAGE

Advocacy, Community & Financial Security

Objective

Strengthen NAIFA's advocacy leadership by engaging members, policymakers and communities in advancing policies and financial-security solutions that benefit financial professionals and the consumers they serve.

Advocacy is NAIFA's defining strength and a fundamental reason financial professionals belong to their professional association.

Key Programs & Initiatives

Congressional Conference

Strengthen participation in NAIFA's annual Congressional Conference as the industry's premier member advocacy event. The conference will provide training, policy education and engagement with lawmakers while demonstrating the strength of NAIFA's grassroots network.

Federal, State & Interstate Advocacy

Advance NAIFA's policy positions through professional lobbying, regulatory engagement, state legislative activity and participation with interstate organizations.

State Legislative Days & In-District Engagement

Support chapters and members in building sustained relationships with lawmakers through state legislative days, in-district meetings and other opportunities for direct engagement throughout the year.

Grassroots Advocacy & Training

Increase member participation in grassroots alerts, advocacy education, Financial Security Advocate activities, specialty fly-ins and other programs that give members the knowledge and tools to effectively engage policymakers.

Community Conversations, Powered by NAIFA

Expand Community Conversations as a national framework for bringing lawmakers, financial professionals and constituents together around financial-security needs.

NAIFA's PACs

Increase member understanding of and participation in NAIFA's family of political action committees while communicating the role political engagement plays within the association's advocacy strategy.

Knowledge Centers & Collectives as Policy Resources

Leverage the expertise of specialized communities such as the Medicare Collective to provide field intelligence, identify emerging issues and bring knowledgeable financial professionals into public-policy discussions.

Life Happens & Financial Security

Connect NAIFA's advocacy mission with Life Happens' consumer-education mission.

Chapters & Affiliates

Chapters & Affiliates form the foundation of NAIFA's grassroots strength. They organize state legislative days, facilitate relationships with state lawmakers and regulators, encourage member participation in Congressional Conference and grassroots actions, support PAC engagement and identify members who can provide expertise or testimony on public-policy issues.

AMPLIFY

Awareness, Communications & Engagement

Objective

Present a clear, consistent and compelling NAIFA story that increases awareness, strengthens engagement and demonstrates NAIFA's value to members, prospective members, policymakers, industry partners and consumers.

Key Programs & Initiatives

Communications Strategy

Coordinate communications and marketing across the enterprise around shared audiences, organizational priorities and key moments in the annual calendar. Departments develop a greater understanding of one another's programs, audiences and communications needs so campaigns are planned earlier, cross-promoted and amplified across NAIFA channels.

Digital Channels

Use advocacy communications, newsletters, blogs, social media, video, websites and other platforms to showcase NAIFA members, programs, advocacy leadership and industry expertise and drive deeper engagement with the association.

Thought Leadership

Increase opportunities for NAIFA leaders, subject-matter experts and members to represent the association at industry events, in the media and before stakeholder audiences.

Life Happens Consumer Awareness

Position Life Happens as NAIFA's principal consumer-education platform and leverage its reach across the enterprise. Highlight Find a Pro tool on lifehappens.org as a means to gain clients and make more sales.

Advocacy Storytelling

Use storytelling to communicate legislative and regulatory victories, grassroots engagement, member testimony, Congressional Conference, Community Conversations and other examples of NAIFA's advocacy impact.

Promote NAIFA's Professional Expertise

Use LUTCF, LACP, LILI, FSP, Knowledge Centers, NAIFA Live, the *Journal of Financial Service Professionals* and other educational platforms to demonstrate NAIFA's role in elevating financial professionals and helping them succeed.

Audience & Data Strategy

Better define and understand NAIFA's member, prospect, partner, policymaker and consumer audiences so content, programs and outreach are tailored to their interests and preferred channels.

Chapters & Affiliates

Chapters & Affiliates serve as essential amplifiers of the NAIFA message. Chapters incorporate national messaging and branding into state and local communications, promote national programs and advocacy successes, and provide local member stories to demonstrate NAIFA's impact.

THE FOUNDATION

Technology, Data, Collaboration & Operational Excellence

Technology and operational excellence support every enterprise priority. These capabilities enable NAIFA to work efficiently, understand its audiences and deliver quality experiences to members, partners and stakeholders.

Technology & Integration

Evaluate technology resources to ensure the association has the right tools in place, eliminate redundancies and maximize capabilities of existing platforms. Priorities include effective use of HubSpot and other core systems, integration of learning management resources, improvements to member-facing technology, and stronger connections among platforms used across NAIFA departments.

Data & Audience Intelligence

Improve consistency, accessibility and strategic use of data to help understand member and prospect behavior, segment audiences, personalize outreach, evaluate program performance and make informed decisions about resources and priorities.

Artificial Intelligence & Innovation

Leverage AI and emerging technologies to improve productivity, communications, member service, analysis and operational efficiency.

Operational Excellence

Evaluate processes and resource allocation to streamline operations, eliminate activities that do not deliver strategic value and focus resources on priorities that advance the NAIFA 2030 Strategic Plan.

Chapters & Affiliates

Chapters & Affiliates are integral to NAIFA's operational success as a bridge between the national organization and members. National staff provides tools, training, technology and resources chapters need to deliver the NAIFA experience. Chapters provide insight into member needs, program effectiveness and opportunities within their markets.

FROM PLAN TO PERFORMANCE

The 2027 Business Implementation Plan is an active management tool. Cross-departmental collaboration will help drive implementation to align programs, share resources and advance enterprise priorities. Chapters & Affiliates are essential partners in delivering this work to their states and communities.

Progress will be evaluated and reported using the four enterprise priorities of Grow, Expand, Engage and Amplify.

Leadership will use these measures to identify successes, address barriers, adjust strategies and reallocate resources. The Board will receive updates on progress against enterprise targets and significant initiatives.

Together, we will grow and expand NAIFA, engage members and stakeholders, and amplify how the association is empowering financial professionals and consumers through world-class advocacy and education.