



PRESS KIT



NAIFA

National Association of Insurance and Financial Advisors TOGETHER WE CAN TAKE ON ANYTHING.

ABOUT US

The National Association of Insurance and Financial Advisors is the preeminent membership association for the multigenerational community of financial professionals in the United States. NAIFA members subscribe to a strong Code of Ethics and represent a full spectrum of financial services practice specialties. They work with families and businesses to help Americans improve financial literacy and achieve financial security. NAIFA provides producers a national community for advocacy, education and networking along with awards, publications and leadership opportunities to allow NAIFA members to differentiate themselves in the marketplace. NAIFA has 53 state and territorial chapters and 35 large metropolitan local chapters. NAIFA members in every congressional district advocate on behalf of producers and consumers at the state, interstate and federal levels.

NAIFA MEMBERS

NAIFA members provide products, services, and guidance that increase financial literacy in our society, protect their clients against life's inherent risks, help hard-working Americans prepare for retirement, and create financial security and prosperity so their clients can leave a legacy for future generations. They serve individuals, families, and businesses in communities across the United States, building long-term relationships and often living and working in the same communities as their clients. While NAIFA members' clients span the entire range of incomes and assets, the majority are Main Street Americans. They are the teachers, police officers, small business owners, and others who form the backbone of our communities. Almost half of NAIFA members say the "typical annual household income" of their clients falls between **\$50,000** and **\$100,000**; **34 percent** say their typical client's annual income falls between **\$100,000** and **\$150,000**; and **4 percent** say their typical client earns less than **\$50,000** annually.

Among the products and services NAIFA members provide to address America's financial security needs are:

- Life insurance
- Annuity products
- Retirement plans and products
- Long-term and extended care solutions
- Mutual funds and investments
- Individual and group health insurance
- Disability income insurance
- Property & casualty insurance
- Work-site benefits packages
- Education funding plans
- Financial literacy education

NAIFA is the largest, most influential, and oldest association of insurance and financial professionals in the United States. We represent the lifeblood of an industry that contributes to the financial security of 90 million American families. Our members are motivated to succeed and aspire to reach the top ranks of their profession. They are similarly driven to ensure the success of their clients. NAIFA membership carries an obligation to abide by [NAIFA's Code of Ethics](#), which requires agents and advisors to always serve their clients' best interests. They are talented, trusted financial professionals.

The best insurance and financial advisors in the business are NAIFA members.

NAIFA LEADERSHIP

1. President	<u>Lawrence Holzberg, LACP, LUTCF</u>
2. President-Elect	<u>Bryon Holz, CLU, ChFC, LUTFC, CASL, LACP</u>
3. Secretary	<u>Thomas Cothron, LUTCF</u>
4. Treasurer	<u>Brock Jolly, CFP, CLU, ChFC, CLTC, CASL, CFBS</u>
5. Past President	<u>Tom Michel, LACP</u>
6. CEO	<u>Kevin Mayeux, CAE</u>

TRUSTEES

- [Mark Arce, LUTCF](#)
- [Wes Booker, LUTFC](#)
- [Dennis Cuccinelli, LACP](#)
- [Christopher Gandy, LACP](#)
- [Aprilyn Chavez Geisser, LACP](#)
- [Evelyn Gellar, LUTCF, RICP, CLTC](#)
- [Win Havir, CPCU, CLF, LUTCF, FSS, AIC, LACP](#)
- [Jamie Hopkins, ESQ., MBA, CFP, ChFC, RICP](#)
- [Doug Massey, LUTCF, CLU, ChFC, CRES, FSS](#)
- [Danny O'Connell, LACP](#)
- [Vince Vitiello, MBA, CLU](#)
- [Brian Wilson](#)

NAIFA provides continued education, certification programs, and has a Diversity, Equity and Inclusion council that serves an environment of multiculturalism across the finance and insurance industry, and a Young Advisors Team to help bridge the generational gap and ensure NAIFA develops programming and culture to attract and retain young advisors through its Talent Development Center.

- [Life and Annuity Certification Program](#)
- [Life Underwriter Training Council Fellow](#)
- [Young Advisors Team](#)
- [Diversity, Equity, and Inclusion Council](#)

NAIFA CHAPTERS

NAIFA runs on volunteer power. Each state chapter has its own board headed up by a volunteer chapter president. Members that become state chapter presidents have typically given years of service to NAIFA and served at the local chapter level prior to the state level. There are many honors state presidents receive--one favorite is being the flag bearer for the state flag during our annual meeting. NAIFA has 50 state chapters and 35 local chapters.

NAIFA'S ACTION THROUGH ADVOCACY

NAIFA's Advocacy programs offer all of the tools you need to become a politically active and involved advisor. NAIFA members unit their voices through IFAPAC to support candidates for state and federal office who understand the value advisors and agents play in securing America's financial future. Learn more about our Advocacy programs below.

- [Annual Congressional Conference](#)
- [Federal Issues and Positions](#)
- [Interstate - helping to shape and mold state laws and regulations\)](#)
- [State Issues and Positions](#)
- [Partnerships and Coalitions](#)
- [NAIFA Members Serve Main Street Americans](#)

PATHWAY TO FINANCIAL SECURITY

- [Careers in Financial Services](#)
- [Find an Advisor](#)
- [Financial Security Resources](#)

NAIFA PARTNERSHIPS

NAIFA advocates for individuals and companies to belong to professional associations, service & religious organizations, and charitable organizations. The culture of belonging is one that we believe is the basis for healthy communities. In addition to NAIFA, our typical member belongs to a variety of other organizations which is why we think our members are even more amazing for the time and talent they consistently dedicate to NAIFA each year.

To ensure a stronger community, we partner with a variety of not-for-profit and for-profit organizations. Our partner program includes:

ADVOCACY ASSOCIATION PARTNERS

NAIFA is partnered with many other associations to serve as their advocacy arm at both the federal and state level. We are proud to be the voice of the producer for the following associations:

- [Society of Financial Service Professionals](#)
- [Latin American Association of Insurance Agencies](#)
- [National African-American Insurance Association](#)
- [Women in Insurance and Financial Services](#)

CORPORATE PARTNERS

- [American National](#)
- [Ameritas](#)
- [Mutual of Omaha](#)
- [Principal](#)
- [Prudential](#)

MARKETING PARTNERS

- [Copytalk](#)
- [Females and Finance](#)
- [Insurance News Net](#)
- [Insurtech Express](#)

WHAT NAIFA CAN OFFER TO THE MEDIA:

- Trusted sources for commentary on current legislative, regulatory or consumer issues involving financial services topics and/or the industry
- Speakers for events, podcasts, radio or TV interviews
- Resources for legislators, regulators, and media
- One-stop access to find licensed agents and advisors to provide clarity and commentary on a wide variety of topics in the financial services industry



MEDIA RESOURCES

[Advisor Today](#)

[Advocacy in Action](#)

[Business Performance Center](#)

[Talent Development Center](#)

[Limited & Extended Care Planning Center](#)

[FinancialSecurity.org \(Consumers\)](#)

NAIFA SOCIAL MEDIA SITES

- [FACEBOOK](#)
- [TWITTER](#)
- [INSTAGRAM](#)
- [LINKEDIN](#)

INSIGHTS AND ANALYTICS

[WEBSITE PAGE VIEWS](#) : 1,471,623

[NEW USER VISITS](#) : 244,115

TO REQUEST INTERVIEWS WITH NAIFA MEMBERS OR LEADERSHIP CONTACT

Suzanne Carawan, VP, Marketing & Communications

Work: (703) 770-8402 Ext. 8402

Email: scarawan@naifa.org

Mark Briscoe, Senior Director Strategic Communications

Work: (703) 770-8111 Ext. 8111

Email: mbriscoe@naifa.org