



Membership Pitch

(5-7 Minutes)

(You will need to distribute a membership app to each person before making the presentation.)

- 1) Congress wants to tax the death benefit of life insurance sold in the United States. Let me repeat that --- (repeat)
- 2) Congress wants to tax the inside build-up of cash value life insurance. Let me repeat this one as well --- (repeat)
- 3) The Florida Legislature wanted to pass a 7% state tax on the commissions that insurance agents earn in this state (that's in addition to your federal income tax).
- 4) The Florida Legislature thought it would be a good idea to allow attorneys in this state to be able to sell life insurance without having an insurance license. Imagine being in competition with every attorney in your town in the sale of life insurance.
- 5) The National Association of Insurance and Financial Advisors – NAIFA – has, so far, stopped all of those legislative initiatives – and many, many others harmful to financial advisors and consumers.
- 6) Agents who work for New York Life and are members of NAIFA generate 52% more premium than non-member agents of New York Life – this, according to a survey conducted by New York Life.
- 7) Agents who work for Northwestern Mutual and are members of NAIFA generate 48% more premium than non-member agents of Northwestern Mutual – this, according to a survey conducted by Northwestern Mutual.
- 8) The NAIFA website has a wealth of tools, calculators, articles, a virtual library for financial advisors, practice specialty tools, and practice management tools – all to make you more successful.
- 9) NAIFA is your professional association. Just as CPA's, attorneys, doctors, and architects have their professional associations, so too, you have NAIFA.
- 10) If you would like help with Practice Management – how to set up or streamline your business to make you more profitable -- NAIFA has the tools and coaches to help you. It's included as part of your dues. In addition, members have access to discounted E&O insurance.
- 11) Professional development and continuing education opportunities offered by NAIFA will enhance your skills. Life insurance, annuities, employee benefits, estate planning, health insurance, financial advising,

retirement planning, and investments – all are available. Discounts on certifications through the affiliations with American College are available too.

- 12) As a member of NAIFA, you demonstrate to your clients and prospects that you are, indeed, a professional. The NAIFA logo is your mark of professionalism – use it on your website, your letterhead, your business cards.
- 13) NAIFA membership also means being a member nationally, statewide, and locally with local chapters in (name the city(s)).
- 14) Dues are approximately \$500 per year depending on which local chapter you select. That works out to about \$45 per month. You can pay annually or monthly – draft either by credit card or your checking account.
- 15) Strengthen your commitment to this great industry and show others that you are committed. NAIFA protects your career thru legislative advocacy in Congress, the White House and the Supreme Court... thru advocacy at the state Capitol in Tallahassee – before the House of Representatives and the Senate -- as well as the Governor's office and the Department of Financial Services.
- 16) Please join today. The white membership applications are in front of you. Please take a moment and complete them now, and turn them in to me (_____location_____) --- I'll be there to greet you and answer any questions you may have....
- 17) Many thanks and thanks for allowing me to visit you. Have a great day... Thank you!