

NAIFA Membership

Sample Phone-a-thon Script

INTRODUCTION: Hi, [Mr. /Ms.] [LAST NAME], this is [YOUR FULL NAME]. I'm calling from NAIFA [Local or State]. I am a member of [NAIFA-Local or State] and I wanted to call you and thank you for your past membership and support of NAIFA. According to our records we show you have not renewed for the upcoming year, maybe this is a simple oversight? If you would like, I can personally help you renew your membership today?

VOICEMAIL: My name is [YOUR FULL NAME] and I am calling from NAIFA regarding [Mr. /Ms.] [LAST NAME]'s NAIFA membership. It looks like we haven't received your membership renewal as of yet and we would appreciate the opportunity to advocate on behalf of you in the next year. [Mr. /Ms.] [LAST NAME] can return my call at [your direct phone number].

WHO/WHAT IS NAIFA? NAIFA, the National Association of Insurance and Financial Advisors, is [Mr. /Ms.] [LAST NAME]'s professional association. As a member, [Mr. /Ms.] [LAST NAME] has been involved in representing the interests of insurance and financial advisors on Capitol Hill and in [Mr. /Ms.] [LAST NAME]'s Backyard. I am calling today to verify [Mr. Ms.] [LAST NAME]'s membership status.

RENEW ONLINE: You can always renew your membership online at www.naifa.org/renew. If you have any problems navigating the site, please call the NAIFA Member Service Center at 877-TO-NAIFA (866-2432) or email membersupport@naifa.org.

"NO" OR "NOT INTERESTED": The main goal of NAIFA is to help you grow and protect your business. NAIFA's programs and services are designed to give you the competitive edge.

As a member, you receive the benefits that our members have taken advantage of to build a strong bottom line: a tireless advocate to protect your interests in Congress and in your backyard, the best sales and professional development training in the business, tools and ideas for finding prospects and leads, discounts on the business services you need, and networking opportunities on the National, State and Local level. *Remember, NAIFA is all about you!*

WON'T GIVE YOU A CREDIT CARD:

EMAIL OPTION — I'll be glad to have an invoice emailed to you. May I verify your email address? [Record email] And, may I also have your fax number for our records? [Record number] You will receive your email invoice shortly. Thank you for your time and continued support of NAIFA. Your NAIFA membership benefits will be reinstated upon receipt of the payment. Have a good day.

FAX OPTION — I'll be glad to have an invoice faxed to you. May I verify your fax number? [Record number] And, may I also have your email address for our records? [Record email] You will receive your fax invoice shortly. Thank you for your time and continued support of NAIFA. Your NAIFA membership benefits will be reinstated upon receipt of the payment. Have a good day.

SNAIL MAIL OPTION — I'll be glad to mail the invoice to you. May I verify your address? [See your call sheet for address.] You should receive the invoice within a few days. May I have your fax number and email address for our records? [Record number and email] Thank you for your time and continued support of NAIFA. Your NAIFA membership benefits will be reinstated within two to three business days after receipt of your invoice. Have a good day.

I'LL PAY THROUGH MY LOCAL/STATE: When payments are submitted to NAIFA-National your renewal is immediately processed and updated. Payments made through the state and local may take longer to renew. However, thank you for renewing your membership.

LEFT/SOLD BUSINESS: I understand. I will update our records. Thank you for your past support, [Mr./Ms.] [LAST NAME] and good luck. Have a great day.

I'M RETIRED: Congratulations! I'll make sure our records are updated. Thank you for your past support. We know you recognize the importance of our organization and the need for advocacy. We now offer a special membership level for our retired members. Would you be interested in remaining a NAIFA Florida member at a reduced rate of \$32.50 a month? We would love to have you remain engaged with us and this would not only allow you to remain engaged, but you would be updated on a regular basis about the good work NAIFA is doing across the country.

We really appreciate your membership, and enjoy your retirement. You've earned it. Have a great day.