



Membership



ADVOCATE. EDUCATE. DIFFERENTIATE.

Joseph Schreck

ATLANTA, GEORGIA

2024 NATIONAL YOUNG ADVISOR OF THE YEAR

LOYAL MEMBER SINCE 2016

BELONG TO THE ONE & ONLY NAIFA

Your Professional Association

Belonging to your professional association establishes you as an individual who is committed to your career as a financial services professional. Through your membership, you will join a national network of performance-driven professionals who proudly adhere to a Code of Ethics, proudly engage in the democratic process to protect their businesses, and continuously seek self-development opportunities through education and servant leadership programs.

NAIFA's Fees Align with the Acceleration of Your Career

| Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|------------|------------|------------|------------|------------|
| \$10/month | \$20/month | \$30/month | \$40/month | \$68/month |

plus \$1 processing fee

We understand that the first few years establishing your practice are challenging. NAIFA provides a ramp-up period in membership fees so that you don't have to wait to join until you're established to join your professional association. While NAIFA has accelerator programs for young advisors, individuals join NAIFA throughout the lifecycle of their career due to our advocacy & education programs that span practice areas and demographics. NAIFA is a multi-generational association that includes everyone who is invested in the financial security of Americans and chooses to belong.

In addition to membership categories for those practicing in regulated professions, NAIFA also offers membership categories for the following financial security professionals:

| Administrative Professional | Industry Professional | Student |
|-----------------------------|-----------------------|-----------|
| \$20/month or \$240/year | \$500/year | \$50/year |

QUICK FACTS:

One fee covers membership at the national and state chapter level

Opportunities to meet & represent NAIFA with your state & federal policymakers with full training provided

Listed & promoted to consumers with opportunities to be profiled at www.financialsecurity.org

Opportunities to speak, write & volunteer at the state & national levels

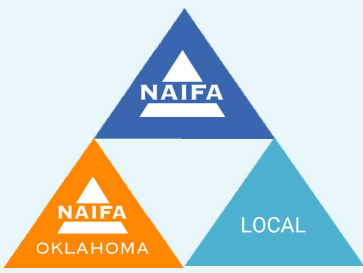
Comprehensive membership benefit bundle including access to group health plans, E&O insurance, travel, and more

National network that includes financial advisors, attorneys, CPAs, insurance agents, financial coaches, experts in business practice management, marketing, and specialty areas.

www.naifa.org/join



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OPPORTUNITIES AT **State Level**



NAIFA is the only membership association for insurance and financial professionals with an active chapter in every state. The NAIFA-Oklahoma chapter ties you in to advocacy on legislative and regulatory issues in Oklahoma City that impact your business, your clients, and our industry.

Your state chapter offers 1 Legislative CE Credit annually for your professional membership. NAIFA-Oklahoma also offers a variety of volunteer opportunities.

OPPORTUNITIES AT **Local Level**

NAIFA-Oklahoma represents Main Street USA and members are closely tied to their communities. Licensed agents are encouraged to become members and share in the opportunities offered by this National Professional Association. Members are talented and trusted financial professionals who reside in all areas of the state.

THE VALUE TO YOU

Make more money by working smarter through sales tips & mentoring

Build your partner network of advisors with complementary services

Build your centers of influence & personal/professional brand

Increase your enjoyment & pride in your business by giving back to your clients, community & country

TOP PROGRAMS

- State-level advocacy including an annual Legislative Day at the Capitol
- CE Days in various locations
- NAIFA Live monthly meetings
- Networking opportunities
- Annual Conference
- Virtual Programming

HELPFUL LINKS

naifa-oklahoma.org/

WHO TO CONTACT

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