

WWW.NAIFADALLAS.ORG



NATIONAL ASSOCIATION OF INSURANCE
AND FINANCIAL ADVISORS-DALLAS

MARKETING SPONSORSHIP
PROGRAM

Partnership and Marketing Opportunities



Who We Are

NAIFA National, founded in 1890, is one of the largest financial services membership associations in the United States. NAIFA members are financial advisors and insurance professionals who focus first and foremost on client care. Satisfaction comes from providing guidance to families who are seeking financial wellness. A NAIFA Advisor is a person who continuously strives to improve and gives back to the local community, or what we refer to as “Main Street USA.”

NAIFA Dallas, founded in 1913, is the largest local chapter in Texas, and larger than over 20 state chapters. Our membership is made up of advisors that practice at the kitchen table, at local coffee shops, in board rooms and in offices that bear their name - encompassing all aspects of the insurance industry including life, health, property & casualty, annuity, disability, securities and certified financial planning.

The mission of this Association is to advocate for a positive legislative and regulatory environment, enhance the business and professional skills of our members and promote ethical conduct in all aspects of our lives.

Why Partner with NAIFA-Dallas?

Connections that Count: Each of our members is a “trusted advisor” to hundreds of clients and they meet with new prospects every day. Marketing Sponsorship connects you with these trusted advisors, on a one-on-one basis, at a diverse line-up of events and programs. Sponsorship puts you “up front and center” with those individuals who can use, or recommend, your products and services.

Your Sponsorship is key to the Association providing its members quality programs around changes in the industry, the economy, retirement planning, asset and risk management. It’s through continual education and professional development that our members stay ahead of the pack; ultimately offering higher levels of guidance and service for their clients.

NAIFA-Dallas is excited to offer you the opportunity to sponsor at the Platinum, Gold, Silver or Bronze level.

Our Goal for You

High profile visibility = Return on Investment. Our Sponsorship levels are designed to give you maximum exposure and access to events presented by NAIFA-Dallas to Association Members. Pick the value level that provides your organization the most impact. With your support we can deliver higher-quality events which will, in turn, attract more member attendees.

PLATINUM PARTNER - \$10,000*



President's Cabinet Memberships (4)

- Prepaid meals for all regular NAIFA-Dallas Luncheon meetings
- Free admission to all regular Continuing Education (CE) classes
- Special name badge
- Company logo prominently displayed at all events
- Roundtable advisory discussions with NAIFA-Dallas President and Board



Reserved table at Luncheons



Preferred seating at all Events



Opportunity to present or sponsor a speaker at each of these Events:

Annual Summit for Success

- A day packed with powerful speakers addressing topics relevant to economic trends, sales techniques, professional development, asset and risk management and financial planning strategies
- Conduct presentation or sponsor Speaker
- **6** Attendees
- Exhibit Space Table

Association Luncheons

- Sponsor Luncheon Speaker or
- Conduct CE presentation or Sponsor Speaker following Luncheon**

Lunch 'n' Learns

- Conduct Presentation or sponsor Speaker



Annual Awards Dinner - (4 seats)

- Presentation of the NAIFA-Dallas' Advisor of the Year and O.C. Jackson Hall of Fame Awards celebration at Ill Forks Restaurant. We recognize award recipients for their work ethic and commitment to their clients, the insurance industry and NAIFA.



Sponsor Attendee and Introduce Legislator/Candidate at President's Cabinet Legislative Event

- Mingle at this exclusive event attended by President Cabinet members and State legislators. A chance to meet incumbents and potential candidates in person in a small, up close venue.



Large Banner Ad - Online Member Directory



Large Banner Ad - NAIFA-Dallas Website



Sponsor Level acknowledgement on NAIFA-Dallas LinkedIn and Facebook pages



Special Event (TBD) for Sponsors, Board & Staff (5 guests)

GOLD PARTNER - \$5,000*



President's Cabinet Memberships (2)

- Prepaid meals for all regular NAIFA-Dallas Luncheon meetings
- Free admission to all regular Continuing Education (CE) classes
- Special name badge
- Company logo prominently displayed at all events
- Roundtable advisory discussions with NAIFA-Dallas President and Board



Reserved table at Luncheons



Preferred seating at all Events



Opportunity to present or sponsor a speaker at each of these Events:

Annual Summit for Success

- A day packed with powerful speakers addressing topics relevant to economic trends, sales techniques, professional development, asset and risk management and financial planning strategies
- Conduct presentation or sponsor Speaker
- **3** Attendees
- Exhibit Space Table

Association Luncheons

- Sponsor Luncheon Speaker or
- Conduct CE presentation or Sponsor Speaker following Luncheon**

Lunch 'n' Learns

- Conduct Presentation or sponsor Speaker



Annual Awards Dinner - (2 seats)

- Presentation of the NAIFA-Dallas' Advisor of the Year and O.C. Jackson Hall of Fame Awards celebration at Ill Forks Restaurant. We recognize award recipients for their work ethic and commitment to their clients, the insurance industry and NAIFA.



Sponsor Attendee and Introduce Legislator/Candidate at President's Cabinet Legislative Event

- Mingle at this exclusive event attended by President Cabinet members and State legislators. A chance to meet incumbents and potential candidates in person in a small, up close venue.



Medium Banner Ad - Online Member Directory



Medium Banner Ad - NAIFA-Dallas Website



Sponsor Level acknowledgement on NAIFA-Dallas LinkedIn and Facebook pages



Special Event (TBD) for Sponsors, Board & Staff (4 guests)

SILVER PARTNER - \$2,500



President's Cabinet Membership (1)

- Prepaid meals for all regular NAIFA-Dallas Luncheon meetings
- Free admission to all regular Continuing Education (CE) classes
- Special name badge
- Company logo prominently displayed at all events
- Roundtable advisory discussions with NAIFA-Dallas President and Board



Reserved table at Luncheons



Preferred seating at all Events



Opportunity to present or sponsor a speaker at each of these Events:

Annual Summit for Success

- A day packed with powerful speakers addressing topics relevant to economic trends, sales techniques, professional development, asset and risk management and financial planning strategies
- Conduct presentation or sponsor Speaker
- **3** Attendees
- Exhibit Space Table

Association Luncheons

- Sponsor Luncheon Speaker or
- Conduct CE presentation or Sponsor Speaker following Luncheon**

Lunch 'n' Learns

- Conduct Presentation or sponsor Speaker



Annual Awards Dinner - (1 seat)

- Presentation of the NAIFA-Dallas' Advisor of the Year and O.C. Jackson Hall of Fame Awards celebration at Ill Forks Restaurant. We recognize award recipients for their work ethic and commitment to their clients, the insurance industry and NAIFA.



Sponsor Attendee and Introduce Legislator/Candidate at President's Cabinet Legislative Event

- Mingle at this exclusive event attended by President Cabinet members and State legislators. A chance to meet incumbents and potential candidates in person in a small, up close venue.



Small Banner Ad - Online Member Directory



Small Banner Ad - NAIFA-Dallas Website



Sponsor Level acknowledgement on NAIFA-Dallas LinkedIn and Facebook pages



Special Event (TBD) for Sponsors, Board & Staff (3 guests)

BRONZE PARTNER - \$1,500

SELECT ONE of the following:

Annual Summit for Success

- A day packed with powerful speakers addressing topics relevant to economic trends, sales techniques, professional development, asset and risk management and financial planning strategies
- Conduct Presentation or sponsor Speaker
- **2** Attendees
- Exhibit Space Table

Regular Association Luncheon

- Sponsor Speaker or
- Conduct CE presentation** or
- Sponsor CE Speaker following Luncheon**

Plus,



Sponsor Logo and Level displayed on PowerPoint presentations preceding regularly-scheduled Events



Sponsor Level acknowledgement on NAIFA-Dallas LinkedIn and Facebook pages



Special Event (TBD) for Sponsors, Board & Staff (2 guests)

*Non-industry Platinum and Gold Partners will be given exclusivity for their products/services.

**CE Providers must be approved by the Texas Department of Insurance (TDI) and course approval must be received a minimum of 30 days prior to presentation date.

AGREEMENT

CONTACT INFORMATION

Company Name: _____
Company Contact: _____
Phone: _____ **Email:** _____
Mailing Address: _____
City: _____ **State:** _____ **ZIP:** _____
Website: _____

SPONSORSHIP FEES

PLATINUM	\$10,000*	GOLD	\$5,000*
How would you like to pay?		How would you like to pay?	
<ul style="list-style-type: none"> ○ In Full \$10,000 ○ Quarterly \$ 2,500 ○ Monthly \$ 833.33 		<ul style="list-style-type: none"> ○ In Full \$5,000 ○ Quarterly \$1,250 ○ Monthly \$ 416.67 	
SILVER		BRONZE	
\$2,500		\$1,500	
How would you like to pay?		How would you like to pay?	
<ul style="list-style-type: none"> ○ In Full \$2,500 ○ Quarterly \$ 625 ○ Monthly \$ 208.33 		<ul style="list-style-type: none"> ○ In Full \$1,500 ○ Quarterly \$ 375 ○ Monthly \$ 125 	
<p>*Non-industry Platinum and Gold Partners will be given exclusivity for their products/services. **CE Providers must be approved by the Texas Department of Insurance (TDI) and course approval must be received a minimum of 30 days prior to the presentation date.</p>		Bronze Event (please check one):	
		<input type="checkbox"/> Annual Summit for Success (2 attendees) <input type="checkbox"/> Sponsor Luncheon Speaker at regular Association Luncheon <input type="checkbox"/> Sponsor CE Speaker** <input type="checkbox"/> Conduct CE presentation following regular Association Luncheon**	

SPONSORSHIP PROGRAM DATES: _____ **TO** _____

SPONSOR

NAIFA-DALLAS

Name: _____ Name: _____
 Title: _____ Title: _____
 Date: _____ Date: _____

Mail/scan form to Karen True, Executive Vice President, 40 E. McDermott Dr., Allen, TX 75002 or email to ktrue@naifadallas.org

NAIFA KEEPS ADVISORS IN BUSINESS

According to the Bureau of Labor Statistics, the financial services profession will need to grow more than twice as fast as the overall workforce by 2020 to meet rising demand.

NAIFA's LACP Certification serves consumers by recognizing financial professionals with a mark of distinction for their product knowledge, consultative sales process and compliance to ethical, legal, and regulatory requirements.

New advisors benefit as NAIFA provides the networking support and motivation they need to grow their knowledge and stay in business.

Seasoned advisors need to keep up, too. NAIFA membership assists advisors in every stage of their career with targeted programs that will keep them relevant, such as practice diversification, so they can broaden their offerings to more diverse sets of clients.

NAIFA PROGRAMS MEET TODAY'S NEEDS

The modern family is changing, with single and same-sex households, diverse communities and baby boomers who need to know how to decumulate their wealth. Advisors need to shift their focus to serve clients in different ways. Through professional development, education and resources, such as Advisor 2020, NAIFA equips advisors to serve the new market.

NAIFA PROTECTS OUR CLIENTS

NAIFA's members are constituents and employers representing every congressional district in the country. When we act, we get results. Only NAIFA represents advisors in every practice area and in every statehouse across the country in addition to Capitol Hill.

NAIFA-Dallas Contact Information:

Karen True, Executive Vice President, P: 214-738-0033 E: ktrue@naifadallas.org

40 E. McDermott, Allen, Texas 75002



Affiliation NAIFA-Texas is the state component of the National Association of Insurance and Financial Advisors, headquartered in Falls Church, Virginia.