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NATIONAL ASSOCIATION OF INSURANCE  
AND FINANCIAL ADVISORS-DALLAS

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MARKETING SPONSORSHIP  
PROGRAM

Partnership and Marketing Opportunities



# Who We Are

**Together We Can Take on Anything  
Advocate. Educate. Differentiate.**

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. Due to the 2020 pandemic, 2021 events may be in person, virtual or hybrid.

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 is 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\*

Due to 2020 pandemic, 2021 events may be in person, virtual or hybrid



## **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
- 5 Attendees
- Exhibit Space

### **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. 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 exciting event attended by President Cabinet members, NAIFA-Dallas members and legislators.



## **Large Banner Ad - NAIFA-Dallas Website**



## **Sponsor Level acknowledgement on NAIFA-Dallas LinkedIn and Facebook pages**

# GOLD PARTNER - \$5,000\*

Due to 2020 pandemic, 2021 events may be in person, virtual or hybrid



## **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

### **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. 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 exciting event attended by President Cabinet members, NAIFA-Dallas members and legislators.



## **Medium Banner Ad - NAIFA-Dallas Website**



## **Sponsor Level acknowledgement on NAIFA-Dallas LinkedIn and Facebook pages**

# SILVER PARTNER - \$2,500

Due to 2020 pandemic, 2021 events may be in person, virtual or hybrid



## **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

### **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. 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 exciting event attended by President Cabinet members, NAIFA-Dallas members and legislators.



## **Small Banner Ad - NAIFA-Dallas Website**



## **Sponsor Level acknowledgement on NAIFA-Dallas LinkedIn and Facebook pages**

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# BRONZE PARTNER - \$1,500

Due to 2020 pandemic, 2021 events may be in person, virtual or hybrid

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

## 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**

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\*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.

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# AGREEMENT

## CONTACT INFORMATION

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

## SPONSORSHIP FEES

<b>PLATINUM</b>	<b>\$10,000*</b>	<b>GOLD</b>	<b>\$5,000*</b>
<b>How would you like to pay?</b>		<b>How would you like to pay?</b>	
<input type="radio"/> <b>In Full</b> \$10,000 <input type="radio"/> <b>Quarterly</b> \$ 2,500 <input type="radio"/> <b>Monthly</b> \$ 833.33		<input type="radio"/> <b>In Full</b> \$5,000 <input type="radio"/> <b>Quarterly</b> \$1,250 <input type="radio"/> <b>Monthly</b> \$ 416.67	
<b>SILVER</b>		<b>BRONZE</b>	
<b>\$2,500</b>		<b>\$1,500</b>	
<b>How would you like to pay?</b>		<b>How would you like to pay?</b>	
<input type="radio"/> <b>In Full</b> \$2,500 <input type="radio"/> <b>Quarterly</b> \$ 625 <input type="radio"/> <b>Monthly</b> \$ 208.33		<input type="radio"/> <b>In Full</b> \$1,500 <input type="radio"/> <b>Quarterly</b> \$ 375 <input type="radio"/> <b>Monthly</b> \$ 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>		<b>Bronze Event (please check one):</b>	
		<input type="checkbox"/> <b>Annual Summit for Success (2 attendees)</b> <input type="checkbox"/> <b>Sponsor Luncheon Speaker at regular Association Luncheon</b> <input type="checkbox"/> <b>Sponsor CE Speaker**</b> <input type="checkbox"/> <b>Conduct CE presentation following regular Association Luncheon**</b>	

**SPONSORSHIP PROGRAM DATES:** \_\_\_\_\_ **TO** \_\_\_\_\_

<b>SPONSOR</b>	<b>NAIFA-DALLAS</b>
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](mailto:ktrue@naifadallas.org)

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#### 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 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, 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.

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### NAIFA-Dallas Contact Information:

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