



National Association of
Insurance and Financial Advisors
California
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Committee Sign Up Form

Due by April 30

State leaders serve the association and it's members on a volunteer basis. You can improve the state association by serving on a committee.

Make a positive investment in your association and commit to serve on a committee today!

Term of service is July 1 through June 30 of any given year. Applications are due by April 30 prior to term of service.

Please type or print clearly.

NAME NAIFA MEMBER ID

COMPANY LOCAL ASSOCIATION

ADDRESS

CITY STATE ZIP

PHONE FAX

EMAIL WEB

Please list below positions of leadership held or committee assignments held in your local association. Include CLU Chapter, GAMA, MDRT and company organization involvement also.

Please indicate your areas of interest in serving NAIFA-California by marking your first, second and third preferences for NAIFA-California committee and task force service.

- | | |
|--|---|
| <input type="checkbox"/> Awards / Local Association Recognition Task Force | <input type="checkbox"/> LILI Committee |
| <input type="checkbox"/> Communications Task Force | <input type="checkbox"/> Membership Committee |
| <input type="checkbox"/> Annual Meeting Planning Task Force | <input type="checkbox"/> Member Benefits Committee |
| <input type="checkbox"/> Finance Committee | <input type="checkbox"/> Nominating Committee |
| <input type="checkbox"/> Government Relations Committee | <input type="checkbox"/> State Legislation Analysts "Readers" |
| <input type="checkbox"/> IFAPAC Committee | |

Awards / Local Association Recognition Task Force

- ▲ Judges annual applications for NAIFA-California's Association Achievement Award.
- ▲ Considers revisions to the Association Achievement Award application.
- ▲ The President appoints the Task Force Chair.
- ▲ One additional member is appointed by the Task Force Chair. NAIFA-California's Immediate Past President also serves.
- ▲ Time commitment: One task force conference call lasting 2-3 hours plus 1 day of grading the applications.

▲

Benefits of Serving: *Gaining an understanding of how the NAIFA-California Association Achievement Award is judged; reviewing and judging the top associations' applications; a chance to see what other associations accomplish during the year.*

Communications Task Force

- ▲ Coordinates with staff in collecting monthly articles for CAL Advisor
- ▲ Reviews website content and usability coordinate updates with staff
- ▲ Research and recommend to the State Board communication ideas and tools for consideration.
- ▲ Committee members include: Chairperson and four to six at large committee members appointed.
- ▲ Time Commitment: One day meeting; quarterly conference calls; follow-up with local Communications and/or Program Chairs either by phone or at region or local meetings.

Benefits of Serving: *Contribute to the growth of your association by enhancing communications in a variety of levels. Shape the future of your organization through effective communication.*

Annual Meeting Planning Task Force

- ▲ Responsible for planning Annual Meeting program content, social activities, recognition events, exhibits and all other Annual Meeting related events.
- ▲ The President-Elect is the Task Force Chair. Other members of the committee include President, Host Association President or Chair, Local Executive and two "at large" members.
- ▲ Time commitment: Two conference calls; follow-up throughout the year as requested by committee chair or staff.

Benefits of serving: *Developing convention programming; opportunity to help determine appropriate and quality presenters, using your creativity to enhance convention programs.*

Finance Committee

- ▲ Based on preliminary data developed by NAIFA-California staff, the Finance Committee meets and develops a budget for recommendation to the NAIFA-California Board of Trustees at the Board's March meeting.
- ▲ Considers dues increases and presents its recommendation to the Board of Trustees.
- ▲ Monitors NAIFA-California's financial status throughout the year and recommends changes in investment and fiscal policy, subject to approval of the Board of Trustees.
- ▲ Oversees non-dues revenue projects, i.e., insurance programs and other services.
- ▲ Committee members include: NAIFA-California Executive Committee, Executive Vice President, and two "at large" members appointed by the President.
- ▲ Time commitment: One day meeting annually.

Benefits of serving: *An opportunity to share your financial expertise for the purpose of strengthening the association's fiscal position; gain a better insight into the financial challenges facing NAIFA-California, work together with NAIFA-California leaders to develop an association financial plan.*

Government Relations Committee

- ▲ Serves as a liaison between the state/federal and local associations on all aspects of governmental relations, including political action, legislation, action alerts and PAC fundraising.
- ▲ Provides progress reports to the Board of Trustees on local association activities relating to government relations.
- ▲ Coordinates with IFAPAC Chair's fund raising activities taking place in local associations.

- ▲ Members (12-14) are appointed by the NAIFA-California Board of Trustees. The Government Relations Committee Chair chairs the committee and NAIFA-California 's APIC, IFAPAC, Legislation and Health Chairpersons also serve on the committee.
- ▲ Time commitment: One one-day meeting, attends Day on the Hill; attend ALC, meet with local GRC chairpersons, monthly phone contact with local associations, monthly written reports.

Benefits of serving: *Be among the first to receive late-breaking news about state and federal legislative or regulatory developments impacting the industry, meet and interact with local association leaders in communicating these developments, mentor local chairs in understanding the importance of government relations; and take pride in having your locals receive IFAPAC recognition because you assisted in keeping them on track with their IFAPAC goals.*

IFAPAC Committee

- ▲ Supports local association in their IFAPAC fundraising activities.
- ▲ Determines, in consultation with NAIFA-California 's Legislative Advocate, to which candidates for state office IFAPAC will contribute.
- ▲ The NAIFA-California Board of Trustees appoints chairperson. The IFAPAC Chairperson and the NAIFA-California Executive Committee select six regional representatives to serve on the committee. The NAIFA-California Chair of Government Relations Committee and a NAIFA-California Board member serves in a liaison capacity.
- ▲ Time Commitment: Committee members attend 2-3 one-day meetings per year; visit each local in their region at least once during the year; attend ALC meeting; maintain monthly phone contact with local chairpersons. Chairperson has additional time commitments due to her/his oversight responsibilities for the committee.

Benefits of Serving: *Gaining insight into how and why IFAPAC chooses to support legislative candidates; sharing fund raising expertise with local chairs, mentoring local chairs to increase levels of contributions to IFAPAC.*

LILI Committee

- ▲ Assists locals in encouraging LILI involvement.
- ▲ Assures that a LILI graduate serves as a temporary Local Leadership Development Chair in locals who have no LILI graduates.
- ▲ Members of the committee will include the Chair and two LILI graduates and four additional at large members.
- ▲ Time Commitment: One to two committee teleconference calls, plus telephone calls with local chairpersons and visits with locals.

Benefits of Serving: *An opportunity to contribute to the leadership development of your local and state association. Use your skills to persuade volunteers to step forward. LILI creates tremendous opportunity for personal and business development*

Membership Committee

- ▲ Assists member locals in achieving their membership goals.
- ▲ Supports locals in organizing "Pride Days", and "National Membership Weeks/Days".
- ▲ The Chair of Membership chairs this committee.
- ▲ The Board of Trustees may serve as members of the committee, other individuals representing specific segments of the membership base may also be asked to serve.
- ▲ Time commitment: Included with the duties of Board Liaisons.

Benefits of Serving: *An opportunity to contribute to the lifeblood of your association; a chance to shape the future of your organization; recruiting membership is the essence and spirit of volunteerism; membership success.*

Member Benefits Committee

Professional Development Committee

- ▲ Supports local associations in their education activities. State Chairperson conducts ALC workshop for local education chair. Committee member may be asked to participate in these sessions.
- ▲ Promotes the NAIFA Award of Excellence.
- ▲ Assures state association fulfills criteria needed to win the Award of Excellence.
- ▲ Promotes LUTC, FSS, and CLU classes on the local level.
- ▲ When appropriate, recommends to the NAIFA-California Board of Trustees educational events the state association should sponsor.
- ▲ Chairperson and four to six committee members appointed.
- ▲ Time Commitment: One or two one-day meetings; follow-up with local Education chairpersons either by phone or at region or local meetings.

Benefits of serving: *Learn what successful CE programs other locals in the state have presented; mentor local education chairs and assist them in improving local CE programs; keep current on the most recent changes in the CE regulations; and share your ideas for enhancing the CE program offered by NAIFA-California.*

Programs Committee

- ▲ Responsible for contacting Local Programs Chairs throughout the year to ensure they are committed to performing their responsibilities.
- ▲ Provide local Programs Chairs with encouragement, ideas and tools necessary for them to produce effective programs on a regular basis.
- ▲ Reports to the State Programs Chair regarding the recommendations and activities of the Local Chairs.
- ▲ Promote program, speaker and educational resources provided at ALC and online
- ▲ Coordinates with State Chair and staff in providing monthly ideas to enhance Programs
- ▲ Encourage the Local Programs Chair to attend breakout session at the ALC
- ▲ Chair conducts ALC workshop for Local Programs Chair; committee member may be asked to participate in these sessions.
- ▲ Chairperson and four to six committee members appointed.
- ▲ Time Commitment: One day meeting; quarterly conference calls; follow-up with local Program Chairs either by phone or at region or local meetings.

Benefits of serving: *Learn what successful programs other locals in the state have presented; mentor local chairs and assist them in improving local programs; share your ideas for enhancing the programs offered by NAIFA-California. Assist in creating a common value throughout the Association that will positively affect membership by establishing and maintaining quality programs offered on a consistent basis.*

Nominating Committee

- ▲ Assures NAIFA-California of qualified candidates for all officer positions on the NAIFA-California Board of Trustees.
- ▲ Encourages member involvement on NAIFA-California committees and task forces.
- ▲ Members are elected representatives to the committee by region. Regions 1-3 elect representatives in odd numbered years. Regions 4-6 elect representatives in even numbered years. Representatives are generally elected for a two-year term.
- ▲ The NAIFA-California National Committeeperson serves as Chairperson for the committee. Additionally the President, President-Elect, and Secretary are members of the committee. The Executive Vice President serves without a vote.
- ▲ Time commitment: One-day committee meeting, two conference calls, telephone follow-up with potential candidates.

Benefits of serving: *Network with your peers and use your people skills to persuade talented volunteers to step forward on behalf of NAIFA-California, watch with pride as individuals you have mentored work their way through the chairs of NAIFA-California; interact with NAIFA-California officers in interviewing and recommending a new slate of leaders.*

State Legislation Analysts “Readers”

- ▲ Works with the Government Relations Committee Chair on reviewing, recommending, and monitoring legislative bills affecting life, health and multi-line agents careers and their clients.
- ▲ Makes recommendations for new or revised Legislative Guidelines. Monitors appropriateness of established guidelines, recommending revisions when necessary.
- ▲ Members include NAIFA-California Government Relations Committee Chair and 8-10 “at large” members.
- ▲ Time commitment: Moderate to heavy reading of legislative bills and proposals; follow-up with Legislative Chairperson by telephone; attendance at the ALC, Day on the Hill, and regional meetings (if possible).

Benefits of serving: *Become a “Sacramento Insider” by gaining advance knowledge of the key bills being introduced that impact your business; as key legislation is passed you will be better informed than your competitors as to how certain changes in insurance law affect your clients; sharing your evaluation about how proposed legislation will impact agents and consumers benefits both the association and the public.*