

## Carol Nicolaysen

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**From:** Kay Nauta [kayn@naifacalifornia.org] on behalf of 'Nickelle Leist' [nickelle@provada.com]  
**Sent:** Wednesday, March 09, 2011 1:22 PM  
**To:** Kay Nauta  
**Subject:** Summary of March CALIFORNIA YAT CHAT

**Follow Up Flag:** Follow up  
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**Nickelle Leist**  
*Director of Business  
Development*

**Provada**  
101 Montgomery  
Street  
13th Floor  
San Francisco, CA  
94104

415.369.9990 x115  
(tel)  
415.369.9991 (fax)

Nickelle@provada.com  
www.provada.com

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Below is a summary of all that was discussed during our March YAT Chat, please share with others – If I missed something or you have something to add, please let me know.

### Membership & YAT Awareness Month:

#### Events you should be talking to your YATs about

- **NAIFA-California Annual Meeting & Sales Exposition** – Anaheim South, May 17-18<sup>th</sup> 2011
- **NAIFA National Conference** – [Earn a free Registration!](#) Washington DC, Sept. 10-14 2011

#### NAIFA Speaker Center

Tap into NAIFA's talent pool of industry experts.

[2010-2011 NAIFA-California Speakers Bureau](#)

#### Are you sharing your upcoming EVENTS on the NAIFA Website?

Local California YAT Chairs, please post your upcoming events on the

- **NAIFA events calendar:** <http://www.naifa.org/benefits/yat/events.cfm>
- Or post on the **NAIFA YAT LinkedIn group:** <http://www.linkedin.com/groups?mostPopular=&gid=1776800>

#### NAIFA National' Social Media Platforms

- [LILI: Leadership in Life Institute](#) | [Alumni site](#)
- [YAT: Young Advisors Team](#) | [LinkedIn site](#)
- [Facebook](#)
- [LinkedIn](#)
- [Twitter](#)

**NAIFA National Membership Month - CASH BONUS INCENTIVE!!!**

<http://www.naifamembershipmonth.com/> *See complete rules here.*

As an added incentive to grow membership in 2011, NIAFA will recognize members who recruit at least three new members... Recruiters will receive a **cash bonus**.

- Each current NAIFA member who recruits three to five new members between February 22, 2011, and March 31, 2011, will receive a check from NAIFA for \$100 in April 2011.
- Each current NAIFA member who recruits six or more new members between February 22, 2011, and March 31, 2011, will receive a check from NAIFA for \$300 in April 2011.
- We will also be recognizing on the website our All-Star Team of top member MVP (based on exceptional new member recruitment performance).

#### **Important Membership Recruiting Resources.**

- [MemberNet](#) – Access a list to help you scout for lapsed members.
  - [Sign on](#) to the NAIFA MemberNet to find lists of lapsed members and prospects in your area.
  - [Watch a video](#) on how to use MemberNet
  - [Review](#) a flyer on how to use MemberNet
- Use the NAIFA logo on your business card. Get a logo at [www.naifa.org/logos](http://www.naifa.org/logos)
- [Membership Marketing Talking Points](#) (Printable flyer)
- [It Pays to Be a Member of NAIFA](#) (Printable flyer)
- [Calculator](#)
- [Benefits Brochure](#) (Printable flyer)
- [Are You Looking For Personal and Professional Development and Education?](#) (Printable flyer)

#### **Read up on your Member Benefit Highlights**

<http://www.naifa.org/benefits/>

- [E&O Insurance program from CalSurance](#)  
[Save with Tmobile](#) – NAIFA members save 50% off Smartphones  
[Featured Member benefit](#) – by ClientCast

## **YAT Awareness Month -----**

### **YAT Leader of the Year Award**

To recognize the work of YATs across the Federation and their commitment to the industry, NAIFA and the Young Advisors Team (YAT) Subcommittee has established the YAT Leader of the Year Award. This award will recognize a YAT who is the epitome of the profession: a committed NAIFA volunteer, successful in his or her career and active in his or her community.

The YAT Leader of the Year is expected to attend NAIFA's Career Conference and Annual

Meeting in Washington, D.C. September 10 – 14, 2011 and participate in YAT programming at the Conference.

- [Click here to submit a nomination for the 2011 YAT Leader of the Year](#)
- [Click here for the 2011 YAT Leader of the Year Flyer](#)

### **How is a person nominated for YAT Leader of the Year?**

A YAT must be nominated by a current NAIFA member through the online application. All applications MUST be made online.

### **What are the minimum qualifications for a YAT Leader of the Year nominee?**

A nominee must meet the following qualifications:

- Be a current NAIFA member
- Have a minimum of four years in the profession
- Be an involved member of NAIFA

### **What attributes are desirable in a nominee?**

- Served in NAIFA leadership positions at the Local, State or National level
- Be a LILI graduate or currently enrolled in LILI
- Has a recognized designation
- Contributes to the PAC
- Has participated in PIC activities
- Actively involved in membership activities, including recruiting new members
- Is involved in external service work such as charities, colleges or other entities

#### **For Managers:**

- Be a member of GAMA International
- Qualified for a GAMA Award

#### **For Recruiters:**

- Be a member of GAMA International
- Qualified for a GAMA Award

#### **For Producers:**

- Achieved a production award
- Qualified for MDRT

### **What is the deadline for the nominations?**

All nominations must be received by Tuesday, May 31, 2011. Any nomination received after this time will not be considered.

### **How will the award be judged?**

Each nominee will be considered on whether they have met the minimum requirements, any additional qualifications they might have and the recommendation letters received on their behalf. The nominations will be reviewed by a committee of NAIFA volunteers,

leaders and staff who will determine the winner.

### **What recognition will the YAT Leader of the Year Award recipient receive?**

The YAT Leader of the Year recipient will receive:

- Complimentary registration to the NAIFA Career Conference and Annual Meeting
- Airfare to the annual Conference, up to \$500\*
- Three nights complimentary hotel at the headquarters hotel
- A commemorative award
- Notice of the award in NAIFA publications
- Award is non-transferable

### **YAT Spotlight**

There are quite a few YAT groups in the NAIFA Federation that are successfully fulfilling the YAT mission. The aim of the YAT Group Spotlight feature is to highlight the successes and best practices of these local YAT groups so that other YAT groups can adopt their productive practices. If you'd like your YAT group to be profiled, please contact [yat@naifa.org](mailto:yat@naifa.org) with your contact information and a brief summary of your YAT group and its events.

### **YAT Buddy Program Highlights**

The program will be implemented through the National Committee person in each local. They are charged with Leadership development and looking at each member with an eye to their future in the Association.

#### **There are two aspects to the program**

- Provide mentoring to those in need. This would be a six month program between a senior member of NAIFA and a new member focusing in on their sales and marketing. Depending upon proximity this can be either a phone call or face to face visit. The goal will be to improve the agents sales and marketing for their business. I agree that there needs to be a template for the mentor and mentee to follow, though some flexibility for each person's personality. In the long run we will suggest LILI as the 'next step' in their development.
- Develop Local Association Leadership. I believe that each member from day one needs a job. It might be to greet, it might be to help out at an event. We become involved when we roll up our sleeves and join with others. This should lead to committee assignments and Board positions.