

# Proactive Advocacy on Capitol Hill and All 50 States

NAFA is tireless in its efforts to form relationships and educate audiences about the value of all forms of fixed annuities.

NAFA does not believe the fight to protect fixed annuities is over. We must be armed and prepared to protect and defend our products. You can count on NAFA to advocate on your behalf through the constant monitoring of potential hazards and opportunities with state/federal regulators and legislators, including:

- ▶ Dedicated Washington D.C. lobbyist proactively advocates for legislation which positively impacts our industry and promotes the awareness of factual information about fixed annuities
- ▶ State-by-state monitoring and action on legislation and regulation impacting our industry, including monitoring developments with every state's Department of Insurance and advocating in each state to defend the role of fixed annuities in the marketplace
- ▶ Actively participating in the National Association of Insurance Commissioners (NAIC)
- ▶ Monitoring and commenting on federal and state issues related to fixed annuities and retirement savings issues
- ▶ Providing timely updates to keep our members abreast of opportunities for and challenges to product distribution and design



NAFA works to proactively educate consumers and the media through educational publications, public comment, and a website for consumers and the media at [www.FixedAnnuityFacts.org](http://www.FixedAnnuityFacts.org).



# Education, Information & Member Resources

## Education:

Education is at the very core of our mission. NAFA is the only association with a focus on educating regulators, legislators, consumers, members of the media, industry personnel, and distributors about fixed annuities and their benefits to retirees and those planning retirement. We also provide valuable, free educational and informational resources for members, including:

- ▶ Monthly educational webcasts on the latest topics impacting our members and the industry
- ▶ Publications to educate consumer about fixed annuities
- ▶ Publications and research for producers and industry leaders, including educational principle papers and insights from Dr. Jack Marrion exclusively for NAFA members
- ▶ Product Specific Training and CE courses
- ▶ Suitability education
- ▶ Principle Papers
- ▶ Writing articles to educate annuity professionals
- ▶ Responding to media requests and any erroneous information about fixed annuities in the media
- ▶ Commenting on regulatory issues

## Information:

NAFA is on the forefront of information and developments impacting our industry. So you'll never be blindsided by issues. Members regularly receive breaking news and information that directly impacts fixed annuity business, including:

- ▶ **Monday Media Report** – an email round-up of the previous week's media coverage on annuities
- ▶ **NAFAWire Annuity News** – Twice monthly e-newsletter with a round-up of important annuity news
- ▶ **State Watch List & Compliance Bulletins** – Real time reporting on proposed or adopted legislation and regulation; and a listing of emerging issues at the federal and state level

- ▶ **Compliance Matrix** – A state-by-state view of pending, proposed and adopted regulations, rules, and guidance memos relating to fixed annuities. Topics covered include: replacement, disclosure, suitability, training, and licensing

## NAFA.com Members-Only Resources

Members can access an extensive library of resources, research, data and industry information for members-only in the login section at [www.NAFA.com](http://www.NAFA.com).

- ▶ Jack Marrion's monthly and quarterly research publications exclusively for NAFA members
- ▶ CE & Suitability Training information
- ▶ Educational Webcast Replays
- ▶ Federal Regulatory Updates
- ▶ Federal Legislative Updates
- ▶ State Updates
- ▶ NAIC Updates
- ▶ Suitability Model Adoption
- ▶ Senior Specific Designation Adoption
- ▶ Civil Union Adoption
- ▶ NAFA Regulatory & Legislative Comments
- ▶ Research and Data Analysis
- ▶ NAFA Publications
- ▶ Media Response Article Archives
- ▶ Member Training Resources
- ▶ Annuity Sales Toolbox for Producers
- ▶ A Journalists Guide to Fixed Annuities
- ▶ NAFA Conference Presentations
- ▶ NAFAwire – Member Newsletters
- ▶ And much more – the member resources at NAFA.com are updated daily



# NAFA is Your VOICE to Protect the Future of Fixed Annuities

## **If You Sell Fixed Annuities... You Need to be a NAFA Member!**

Fixed annuities are popular retirement options. NAFA works hard to ensure that fixed annuities remain competitive and attractive insurance products to help Americans plan for and enjoy retirement.

We are leading the way to protect fixed annuities from burdensome or sales-defeating state and federal regulation, while participating in many new opportunities that will benefit your annuity business. Join the only association dedicated exclusively to FIXED ANNUITIES and their independent distribution. NAFA was a leader in the fight to defeat 151A and we are continually vigilant over the many new issues on the horizon.

When you join NAFA, you will not only become part of the force that advocates fixed annuities you will have access to a multitude of information, resources and educational opportunities.

## ***Preferred Membership – Benefits & Savings***

- ▶ Competitively priced, comprehensive E&O coverage
- ▶ Members-only access to important industry data and Annuity Sales Toolbox at [nafa.com](http://nafa.com)
- ▶ NAFA is a MDRT qualifying association for your MDRT membership
- ▶ FREE 4-hour NAIC Suitability Course
- ▶ FREE educational webcasts
- ▶ FREE *NAFA Annuity Outlook* magazine subscription
- ▶ Benefits of NAFA's advocacy work on both the state and federal levels
- ▶ Important industry insights and updates through NAFA's newswires, annuity alerts and compliance bulletins for members
- ▶ FREE Jack Marrion publications, with marketing strategies and product ideas to grow your business – monthly and quarterly editions (\$440/year value!)

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**Preferred Membership: \$275**  
**\$50 discount when you are affiliated with a NAFA Premier Partner!**



**If you have questions, contact NAFA at 414-332-9306, ext. 3 or [theresa@nafa.com](mailto:theresa@nafa.com)**  
**Join in just a few clicks at [www.NAFA.com](http://www.NAFA.com)**