NAIFA
Rhode Island

National Association of Insurance and Financial Advisors

Partial listing of NAIFA's web-based educational events, time-management coaching, prospecting ideas, and mental vitamins that can increase members' income.

Title	Format	Title	Format
Early Career			
Advisor Solutions (NAIFA Coach)	Online Ed	Develop a Personal Brand	Webinar
Advisor Today Podcast	Podcast	Does Ringo Starr Move His Drum Set?	CS*
Are You Too Nice to Close the Deal?	Webinar	How to Create Your One Page Marketing Plan	Webinar
Big Idea Packaging	Webinar		
Business Management			
Title	Format	Title	Format
ACA Educational Workshop	CS*	Develop Your Personal Brand to See Opportunities Others Don't	Webinar
Build a Better Business	Webinar	Managing Electronic Devices to Meet HIPAA Compliance	Webinar
Client Management			
Title	Format	Title	Format
Business Disaster Prevention	Webinar	MDRT – Big Ideas	CS*
Business Planning with Life Insurance	Webinar	Understanding Living Benefits in Life Insurance	Webinar
Cybersecurity - Protect Your Clients, Yourself, and Your Business	Webinar	Protecting Your Senior Clients from Financial Fraud and Exploitation	Webinar
Ethics & Leadership			
Title	Format	Title	Format
Achieving Peak Performance: The Art and Science of Winning	CS*	Start Your Year Strong Through the Power of Goal Setting	Webinar
Leadership in Life (LILI)	Course	Success Strategies Shared by Fearless Female Leaders	Webinar
Sale & Marketing			
Title	Format	Title	Format
Addressing Retire Risks During Retirement	Webinar	More Leads, More Clients, More Sales	Webinar
Financial Planning for LGBT Couples	Webinar	Planning for the Modern Family	Webinar
Four Simple to Retiring Happily Ever After	Webinar	Values discovery Process	Webinar
Getting Beyond the Production Plateau	CS*	The Family Meeting	CS*
Getting Prospects to Return Your Calls	Webinar	Referrals Without Asking	Webinar
Trustworthy Selling: Recapturing the Lost Art of Selling	CS*	Selling Large Polices to the High Net Worth	CS*

Research & Publications		
Profiles in Success	Finding Success in Diverse Markets	Managing Your Practice: Technology
Securing America's Financial Future	NAIFA Survey of Members (Fiduciary)	NAIFA Survey on Multi-State Licensing

**CS - NAIFA Annual Conference Session (recorded)*

Please watch this 8 minute video on E-Marketing and The Virtual Library. It will clearly show you how The Library can dramatically help you prospect and market yourself.

Practice Tools and Tips: Practice management tools and tips developed to help you grow and succeed in your business.

Priority Planning Concept:
The simplest and most effective selling concept in the industry. Includes all the tools and sales tracks needed for implementation.

Fact Finders:
Forms for gathering facts about your clients for a variety of personal, business and estate needs.

Client Presentations:
Complete concept presentations for virtually all personal, business and estate needs.

Concept Pages:
Hundreds of conceptual personal, business and estate planning ideas for your clients, reduced to one simple page.

Referred Lead Generator:
The RLG is a "prospecting engine" that provides names of a current client's neighbors. These names can then be used to begin the referred lead process.

Target Market Generator:
The TMLG is a "prospecting engine" that allows you to target all the doctors, lawyers, florists, etc. in a small city or zip code.

Specimen Documents:
Specimen documents to help your client's attorney prepare insurance-related documents.

Tax Information:
Printable answers to common tax questions about life and health insurance and annuities with links to and a "road map" of the entire US Tax Code.

Building Your Financial Services Practice:
This book identifies the 6 systems a producer needs to succeed and tells how to establish them. Many agents have found this book a great way to critique their own business, while others have found it invaluable in 'bringing in a junior' associate for succession planning.

Mental Vitamins:
Articles and quotes by "masters" such as Jim Rohn, Zig Ziglar, Brian Tracy, Tom Hopkins and many others.

Life Happens:
The LIFE Foundation has collected stories of real people who benefited from insurance during a time of great personal and financial need, and turned them into brief essays and videos. These stories are wonderful third-party endorsements for the real value of insurance and you can e-mail them to your clients and prospects.

New!

Professional Practice / Product Specialty Tools

Essential business tools designed to meet your needs, no matter what your practice specialty or product line, and organized according to your career level:

Early Career Agents / Advisors in the business 0 - 5 years

- Life Insurance and Annuities
- Practice Management
- Financial Advising and Investments
- Multi-Line
- Health & Employee Benefits

Established Agents / Advisors in the business 5 - 20 years

- Life Insurance and Annuities
- Practice Management
- Financial Advising and Investments
- Multi-Line
- Health & Employee Benefits

Accomplished Agents / Advisors in the business 20 - 25+ years

- Life Insurance and Annuities
- Practice Management
- Financial Advising and Investments
- Multi-Line
- Health & Employee Benefits