

Why Join?

Our mission is to attract, develop and advance women in the insurance and financial services industry.



WOMEN IN INSURANCE & FINANCIAL SERVICES

www.wifsnational.org

Connection. Support. Resources. From the tip of South Florida to the interior of Alaska, WIFS is composed of more than 1,200 **financial advisors, agents, representatives, managers, CPAs** and **attorneys**. All are united in their understanding of what women need in order to thrive including: education and work environments that promote teamwork, balance and constructive collaboration.

BENEFITS OF MEMBERSHIP



ONLINE RESOURCES - Find news, information, videos, articles, resources, exclusive benefits, access to the member directory and an extensive webinar library at www.wifsnational.org.



RECOGNITION - Peer support and acknowledgement of industry accomplishments are key priorities. Members are encouraged to qualify annually for Circle of Excellence.



LOCAL PRESENCE - WIFS has more than 500 members-at-large representing dozens of states, as well as more than 20 local chapters across the US. Chapters conduct regular meetings, special events and educational programs.



WHAT'S IMPORTANT NOW - Frequent communication provides members with association and industry news, member highlights, educational articles, event updates and more.



NETWORKING - Members connect through the National Conference, webinars, social media, the online member directory and local chapter events.



SPEAKERS - Members and industry experts are encouraged to apply to present conference and virtual educational sessions to members.



EDUCATION - Tune in monthly to hear national experts deliver live, members-only presentations on relevant professional development topics. All webinars are recorded and archived for convenient 24/7 member access.



MENTORSHIP - Personal and professional growth are ignited when mentors and mentees share knowledge and professional experience.



NATIONAL CONFERENCE - Hundreds of members gather annually to learn, connect, share best practices, network and be recognized for their professional achievements.



TELL US YOUR NEWS - Share your accomplishments and we will bolster your self-promotion initiatives.



SOCIAL MEDIA - Be part of the online conversation! WIFS hosts groups and discussions on LinkedIn, Twitter and Facebook.



ANNUAL DUES - Membership runs January - December. Members invest the first year at a pro-rated rate through December 31st. Join Today!



OUR VOICE - Individually and collaboratively with NAIFA, we are positioned to communicate strong industry policy messages to legislative leaders.



MDRT MEMBERSHIP - Elevate your industry status! WIFS membership serves as a qualifying professional membership when applying for membership in MDRT (Million Dollar Round Table).

Membership Application



WOMEN IN INSURANCE & FINANCIAL SERVICES

WIFS membership is calendar year based. Individuals who join during the year pay prorated dues. See attached chart for prorated dues. Membership cannot be transferred and is non-refundable.

Return application to:

MEMBERSHIP

WIFS National Headquarters
136 Everett Road | Albany, NY 12205

office@wifsnational.org | Fax 518.935.9232
518.694.5506 | Toll Free 866.264.WIFS (9437)

JOIN ONLINE AT

WIFSnational.org



Membership Information

NAME (FIRST, MI, LAST) _____

CURRENT EMPLOYER _____

POSITION/TITLE _____

PREFERRED EMAIL _____

WORK ADDRESS _____

CITY/STATE/ZIP _____

WORK PHONE _____

HOME ADDRESS _____

CITY/STATE/ZIP _____

HOME PHONE _____

NON-PARTNER AFFILIATED NATIONAL DUES

National Dues \$230.⁰⁰

** Individuals who are not affiliated with any of the Partners for Excellence, are required to pay the Non-Partner Affiliated National dues.*

PARTNERS FOR EXCELLENCE

WIFS partners with companies to promote our mission. Individuals with a partners career contract receive a 50% membership discount that is subject to company verification. Please refer to www.wifsnational.org for current Partners for Excellence Information.

- Ameritas
- Guardian
- Lincoln Financial Group
- MetLife
- Mutual of Omaha
- New York Life
- Penn Mutual
- Prudential

PARTNERS AFFILIATED NATIONAL DUES

Partner Affiliated Dues \$130.⁰⁰

PAYMENT INFORMATION

Partner OR Non-Affiliated National Dues: \$ _____

Local Chapter Dues: \$ _____

Total Dues: (National + Chapter) \$ _____

Sending Check or Money Order (Payable to WIFS in US dollars)

Charge to: Visa MasterCard American Express

Payments to WIFS are not deductible as charitable contributions for federal income tax purposes. They may be deductible under other provisions of the Internal Revenue Code. No portion of your dues payment is attributable to lobbying expenditures.

CHAPTER MEMBERSHIP

All members may join a local WIFS chapter. Members located in areas without active chapters receive all National benefits and are considered Members-at-Large. Please indicate your chapter preference:

- Member-at-Large [\$0]
- AK: Anchorage [\$25]
- CA: Los Angeles [\$50]
- CO: Denver [\$30]
- FL: Gold Coast [\$50]
- FL: Northeast Florida [\$25]
- FL: South Florida [\$35]
- GA: Atlanta [\$50]
- MD: Baltimore [\$40]
- MI: Michigan [\$50]
- MN: Twin Cities [\$50]
- MO: St. Louis [\$60]
- NE: Lincoln - Omaha [\$25]
- NJ: North Jersey Gateway [\$65]
- NY: Albany [\$30]
- NY: New York City [\$55]
- OR: Portland [\$65]
- PA: Philadelphia/Tri-County [\$50]
- TX: Central Texas [\$25]
- TX: Dallas [\$50]
- VA: DC Metro [\$45]
- New Chapter:

_____ \$ _____

CARD # _____

EXPIRATION DATE _____

SECURITY CODE _____

NAME AS IT APPEARS ON CARD _____

SIGNATURE _____

BILLING ADDRESS _____

CITY _____

STATE _____

ZIP _____

Please provide the following demographic information to assist WIFS with strategic planning. Information will remain strictly confidential and be anonymously aggregated in support of corporate partnership and industry promotion initiatives.

Birth Year: _____

Income: Under \$25K \$25-75K \$75-125K
 \$125-\$250K \$250-500K \$500K-1M
 1M+

What year did you join the industry? _____

Have you obtained any of the following designations?

Check all that apply.

- CASL CFP ChFC CLF CLTC
- CLU CPA CSA JD LUTCF
- RHU Other _____

Have you obtained any of the following insurance and securities licenses? *Check all that apply.*

- Insurance Series 6 Series 7 Series 11
- Series 63 Series 65 Series 66

Primary Industry Affiliation:

- Accounting/Banking Insurance Investments
- Financial Planning Legal Mortgage
- Other _____

What best describes your position?

- Attorney Business Owner CPA
- Home Office Industry Executive Manager
- Producer Other _____

Do you regularly speak on industry topics?

- Yes No

Would you be interested in mentoring another member?

- Yes No