

Date of Nomination _____

1. Name of Nominating Member _____

Phone _____ Email _____

Years of NAIFA membership _____

2. Name of Nominating Member _____

Phone _____ Email _____

Years of NAIFA membership _____

Name of Nominee _____

Office Phone # _____ Office Fax # _____

Office Address _____ City _____ State _____ Zip _____

Email Address _____

Primary Business Activities of the Nominee (mark all that apply):

Agent/Life and Health

Agent/Multi-Line

Manager

Brokerage Director

General Agent

Financial Planner

Second Line Field Manager

Investments

Other

What year nominee entered the industry? _____

What year nominee joined NAIFA? _____

Has membership in NAIFA been continuous since that date? Yes No

Business Name: _____

Companies Represented by Nominee: _____

NAIFA

A. List all involvement with NAIFA-IN (Board, Committee positions held):

B. List all involvement with any former local NAIFA Association (Board, Committee positions held):

C. List all involvement with NAIFA at the National level (Committee, Task Force):

D. List positions held in insurance and/or financial planning associations other than NAIFA and years held:

E. List all involvement with your company's agent organizations or management organizations and positions held in these organizations:

F. Has the nominee attended NAIFA national conferences, Congressional Congress or APEX meetings in the past? YES ___ NO ___

If yes, please provide details:

G. Is the nominee a current contributor to the Insurance and Financial Advisors Political Action Committee (IFAPAC)? YES ___ NO ___

How many years has the Nominee been a contributor to IFAPAC? _____

What is the current annual contribution?

Bronze (\$300 to \$599 per year) _____

Silver (\$600 to \$999 per year) _____

Gold (\$1000 to \$2499 per year) _____

Platinum (\$2500 to \$4999 per year) _____

Capitol (\$5,000 or more per year) _____

What is your lifetime contribution to IFAPAC? _____

(NAIFA-Indiana Executive Director can provide all of this information to you.)

H. Is the nominee a Leadership in Life (LILI) Graduate? YES ___ NO ___ YEAR _____

If yes, are you a former or current LILI Moderator? YES ___ NO ___ YEAR(S) _____

I. Has the nominee developed CE courses for NAIFA-IN? YES ___ NO ___

If YES, what courses? _____

J. Has the nominee been a CE presenter for NAIFA-IN? YES ___ NO ___

If YES, what courses? _____

K. What industry related designations does the nominee have?

L. Describe any other NAIFA-IN involvement not previously mentioned:

INDUSTRY PROFILE / PRODUCTION

I. If the nominee is in personal production, please complete this section. Otherwise, please proceed to Section II.**

A. Nominee produces in the following areas:

- Life Insurance and Annuities sales
- Multi-line sales
- Health Insurance sales
- Group sales
- Investments

B. What production clubs and/or honors has nominee qualified for or received from companies? Please list the club levels or describe the honor(s) and the number of years qualified for these clubs or honors.

_____	_____
_____	_____
_____	_____

C. Is the nominee a member of the Million Dollar Round Table? _____
If so, list current MDRT Status:

Life Member	_____
Qualifying Member	_____
Qualifying and Life	_____
Years qualified for MDRT	_____

D. How many times has the nominee received the NAIFA Quality Award (NQA)? _____
How many times has the nominee received the National Sales Achievement Award (NSAA)? _____

E. Number of individual client lives currently insured by the nominee: _____
Number of groups currently insured by the nominee: _____ -

F. If nominee is involved in investments, please answer the following:

The number of clients the nominee has: _____

The total amount of assets under management: _____

G. If nominee is a multi-line agent, please indicate:

- 1. Number of lives insured/served for life, health, annuities and investments? _____**
- 2. What percentage of property-casualty business has been multi-lined with life insurance?
_____ %**

II. If the nominee is a Manager, General Agent or Brokerage Director, please complete this section.**

A. How long has the nominee been in a management or brokerage position? _____

How many agents/brokers are in the agency or unit currently? _____

How many agents were in the agency or unit? 3 yrs. ago _____ 5 yrs. ago _____

How does agency or unit rank nationally, compared to other agencies or units in nominee's primary company? (If applicable) _____

What was the agency or unit's first-year commissions for the previous year? _____

**What was the agency or unit's first-year commissions total? 3 yrs. ago _____
5 yrs. ago _____**

B. Did you ever work in personal production previously? YES ___ NO ___

If yes, for how many years? _____

C. What management awards or recognitions has nominee received from: (List the years received)

The home office?

The insurance industry?

****IMPORTANT, PLEASE READ BEFORE SUBMISSION: IF THE NOMINEE HAS MADE A SIGNIFICANT CAREER CHANGE WITHIN THE PAST 5 YEARS BETWEEN SECTIONS I AND II OF THE INDUSTRY CATEGORIES, PLEASE ANSWER ALL OF THE QUESTIONS IN BOTH SECTIONS I AND II UNDER THE INDUSTRY CATEGORY TO PROVIDE THE COMMITTEE WITH THE STRONGEST ABILITY TO EVALUATE THE NOMINEE.**

COMMUNITY

A. List the leadership/Board of Director positions held in civic organizations and any awards received from these organizations:

B. List the leadership/Board of Director positions held in charitable (Not for Profit) organizations and any awards received from these organizations:

C. List the leadership/Board of Director/Trustee positions held in educational institutions (public/private for school-age or university level) and any awards received from these institutions:

D. List the leadership/Board of Director positions held in religious/church organizations:

E. List any elected offices held in local and/or state government:
