

## Education Committee 2015 Priorities

The Education Committee will support and forward NAFA's mission to promote the understanding and awareness of fixed annuities using a proactive message, supporting the interests of its members. A core value proposition for NAFA members is representation of our education initiatives through the NAFA Education Committee. Members of NAFA include marketing organizations, insurance companies, producers, consultants and vendors. The Education Committee will actively participate in educational activities including writing and publishing educational articles, courses and Webinars which will aid annuity sales professionals in their understanding of the principle features of fixed annuities, their suitability review process, disclosure, and advertising practices.

NAFA's key Education Committee priorities for 2015 include:

1. Work with the NAFA team to direct and develop NAFA education curriculum & content.
2. Design, direct and promote NAFA Educational Webcast series with topics and speakers identified by the Committee.
3. Work with NAFA team to develop comprehensive marketing plan for all NAFA resources
4. Update existing Guiding Principle Papers and develop new papers as follows:
  - a. Illustrations & Hypothetical Analysis
  - b. Misleading Mailers – What Regulators Look For
  - c. Social Security Marketing Principles - dos and don'ts
  - d. Addressing the Changing Income Needs of Clients (highlight on healthcare costs)
  - e. Permitted Activities
5. Develop education papers and responses to address issues identified by fellow committees
6. Work with fellow committees to determine resources available to NAFA Supporting Partners exclusively and NAFA Premier Partners exclusively.
7. Oversight of content for AMP portal for the printing and distribution of NAFA fixed annuities sales and marketing pieces.
8. Repurpose NAFA publications as Consumer Tips and Guides for AMP, NAAM and AnnuRetirement.com website
9. Work with NAFA team to direct and guide the enhancement and reorganization of the NAFA website content and navigation.
10. Develop Annuity training videos
11. Respond to media articles to help clarify, correct and encourage accurate information and help promote the understanding and awareness of fixed annuities.
12. Develop Education and Training curriculum for Internal Marketers Training Symposium in 2015