



IFAPAC

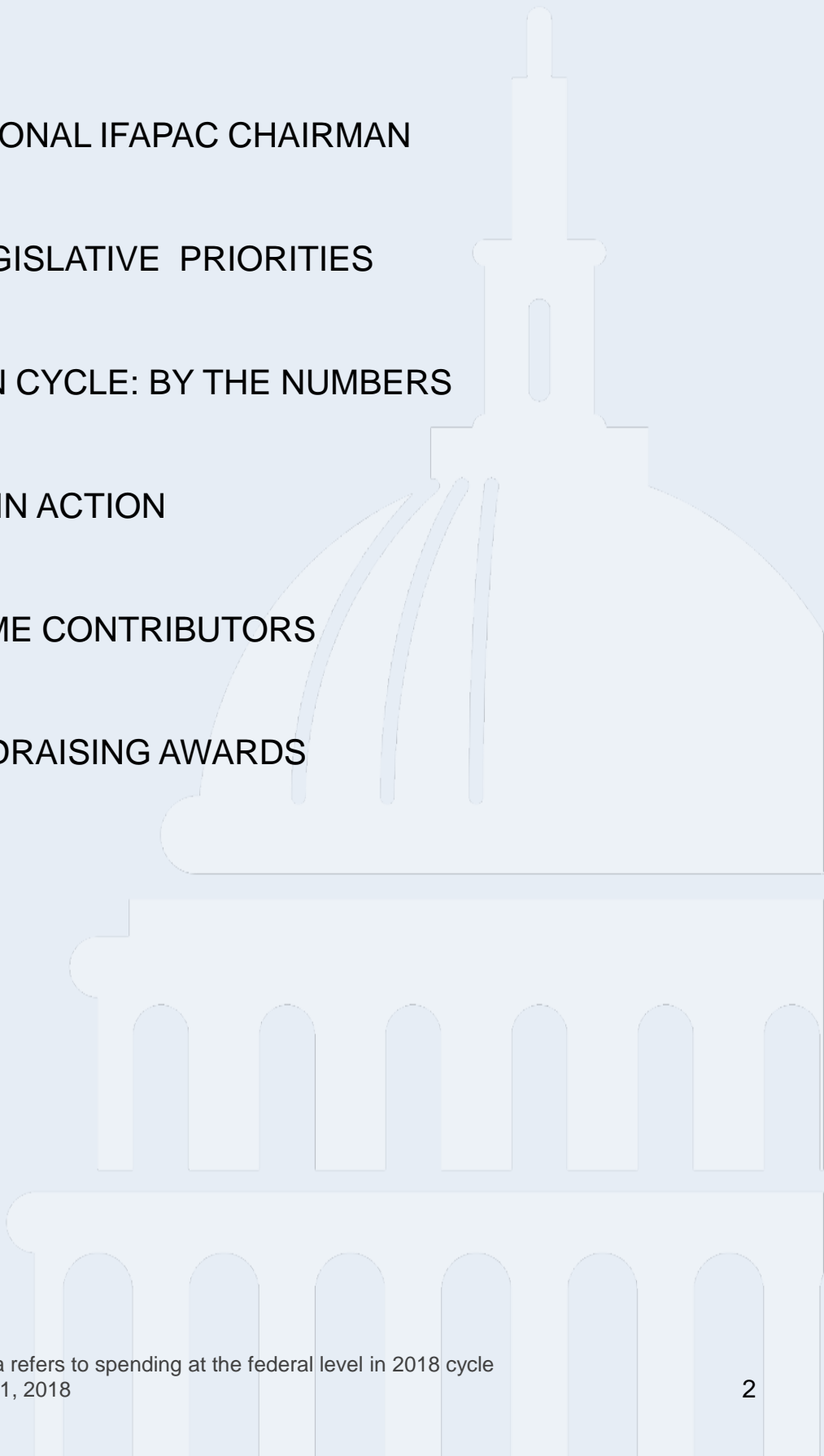
INSURANCE & FINANCIAL ADVISORS
POLITICAL ACTION COMMITTEE



2018 Election Cycle Report

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Thank You

OUR MISSION

There is no more important function for NAIFA than impacting laws and regulations affecting the products that NAIFA members sell and customers need. NAIFA's advocacy programs, Insurance and Financial Advisors Political Action Committee (IFAPAC) and Grassroots, are the first lines of offense and defense for its members.

IFAPAC seeks to advance the legislative interests of NAIFA members on both the state and federal levels, preserve a favorable governmental climate, and promote the best interests of consumers by supporting the campaigns of carefully selected candidates for elective office.

NOTE OF APPRECIATION

On behalf of the entire National IFAPAC Committee, we want to thank all of the IFAPAC contributors for supporting NAIFA's advocacy efforts. IFAPAC raised over \$2 million in 2018. Our success was due to the generous support from over 6,000 members across 50 states and two territories.

IFAPAC was able to use these funds to contribute directly to federal and state candidates who understand the critical role NAIFA members play in protecting the financial future of 90 million American families.

In 2018, the Senior Safe Act was enacted, Rothification was averted, and DOL's Fiduciary Rule was overturned in the Courts. These victories wouldn't have happened without the support of IFAPAC! IFAPAC helps all NAIFA members build relationships with legislators and educate them on the issues that are important to agents, advisors and their clients. We look forward to the continuing success of IFAPAC, as we set our focus on working with the 116th Congress and look towards shaping the 2020 elections.

Charles W. Potts, RHU CLU RFC CFS LACP
2018 National IFAPAC Chairman
Oklahoma City, OK

Doug B. Massey, CLU, ChFC, FSS
2019 National IFAPAC Chairman
San Angelo, TX

NAIFA Federal Legislative Priorities

NAIFA supports a “Main Street Financial Agenda” to ensure that American families can protect themselves against the financial risks of dying too soon, living too long, becoming ill or disabled, and save for retirement. Representing and serving middle market families and businesses in every congressional district, NAIFA members support efforts to:

- Enhance access to professional advice
- Promote financial literacy
- Support a tax regime that encourages Main Street investment and saving
- Prevent elder financial exploitation and protect client data
- Improve retirement readiness and financial security

HOW NAIFA IS WORKING FOR A BETTER FUTURE:



TAX REFORM. Americans need public tax policy that continues to encourage them to plan ahead, protect their families’ financial security, and adequately save for retirement. Well-prepared families have sufficient life, medical, long term care and disability insurance, retirement savings and guaranteed income annuities to supplement Social Security benefits. Small business owners also provide employee benefits, including insurance and savings programs that help their workers achieve this financial security.



RETIREMENT SAVINGS. Public policy should encourage employer-provided retirement plan rules to make it easier for workers to save adequately for retirement. We urge Congress to protect and continue tax policy that encourages individuals to save for retirement and that provides incentives for employer-sponsored retirement savings plans for workers. Eliminating or reducing pre-tax funding of retirement plans would have a negative impact on overall retirement savings.

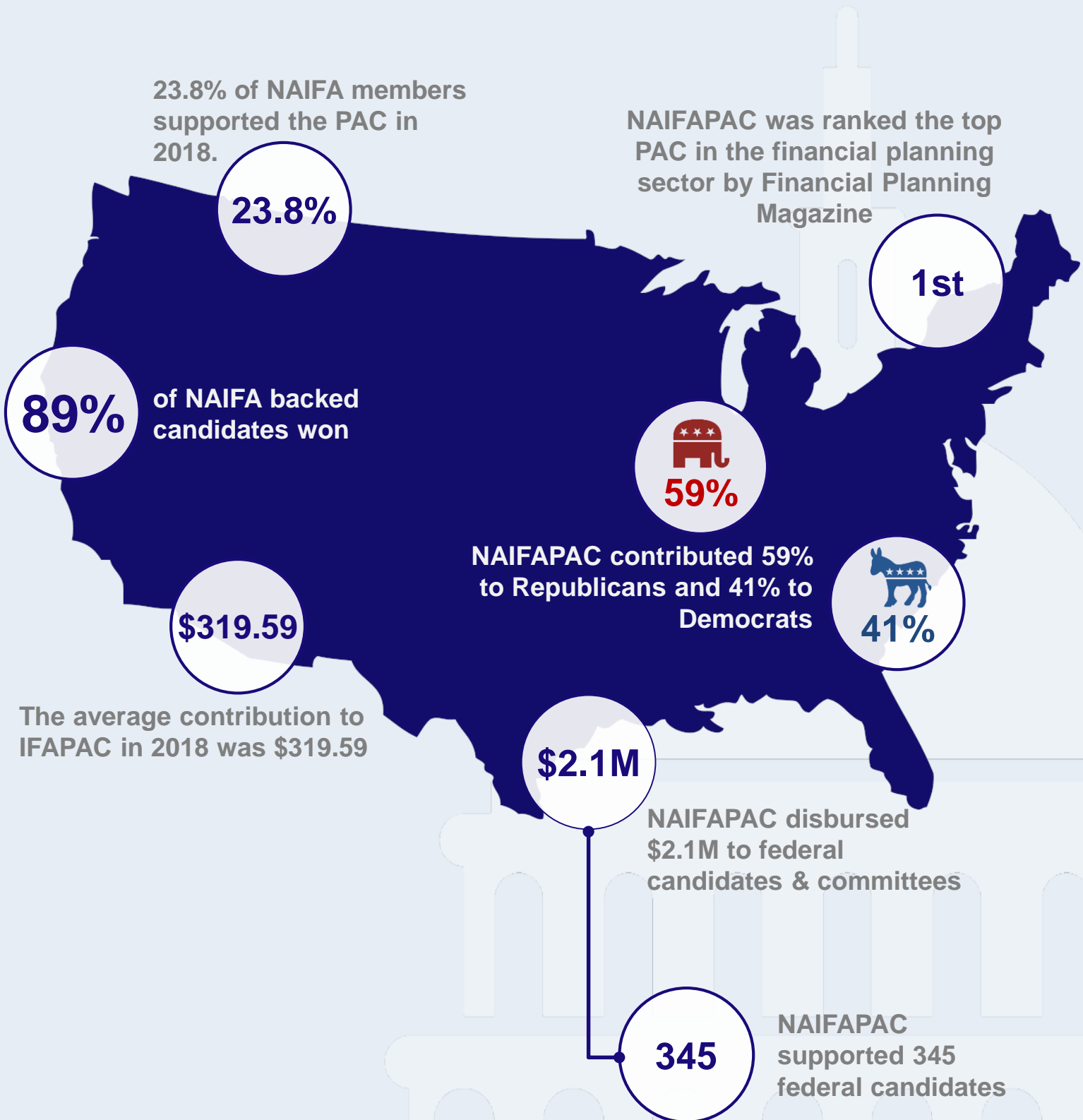


FINANCIAL SERVICES: Public policy should ensure consumers regardless of color, class, gender or sexual orientation have access to affordable financial professionals and products to help all Americans achieve financial security.



HEALTH REFORM. Individuals need policy that improves access to affordable health coverage in a sustainable, competitive insurance market. Licensed, fairly compensated insurance agents offer a cost-effective means of achieving personal and professional assistance in the selection of insurance coverage for individuals and employers of all sizes in all markets.

The 2018 Election Cycle: By The Numbers



NAIFA Advocates In Action

NAIFA MEMBERS & CONGRESS WORK FOR A COMMON GOAL



NAIFA - Oklahoma member Charlie Potts with Rep. Steve Russell (R-OK)



Reps. Austin Scott (R-GA) and Steve Scalise (R-LA) meet with members of NAIFA - Georgia



NAIFA – Wisconsin members meet with Rep. Gwen Moore (D-WI) and Rep. Steny Hoyer (D-MD).



Rep. Judy Chu (D-CA) meets with members of the NAIFA - California delegation



Members of NAIFA - South Carolina meet with Rep. Joe Wilson (R-SC)

2018 IFAPAC Top Donors

IFAPAC would like to thank all of their contributors
for their support of IFAPAC.

We would like to highlight our 2018 contributors
who have an IFAPAC lifetime giving of over \$25,000.

Robert A. Miller - New York
Terry K. Headley - Nebraska
Kent A. Bennett - Pennsylvania
Vincent M. D'Addona - New York
R. Jan Pinney - California
Robert M. Roach - Ohio
Daniel J. Scholz - Nebraska
Terry M. Kaltenbach - California
David L. Stratton - Alaska
James C. McGill - Nebraska
Roger S. McCullough - Iowa
Jules O. Gaudreau Jr. - Massachusetts
Peter Fulchiron - California
Russell A. Smith - California
Larry M. Lambert - California
David M. Koll - Nebraska
Lawrence E. Lounds - Michigan
Keith M. Gillies - Louisiana
Diane Boyle - Virginia
Scott D. Colby - Kansas
Todd G. Grantham - North Carolina
Stephen D. Estler - Florida
C. Robert Brown Sr. - Tennessee
Mary Anne Cannady - South Carolina
Daniel L. Rust - Montana
David Russell - Florida
John M. Ruckel - Texas
James W. Oglesby - North Carolina
Nathan M. Perlmutter - New York
Shane E. Westhoelter - New Mexico
Matthew S. Tassej - Maine
Cliff F. Wilson - Arizona
David B. Malkin - New Jersey
Juli Y. McNeely - Wisconsin

Patricia Beal Brown - Georgia
Peter C. Browne - New York
Robert M. Nelson - Nebraska
Christopher J. Taggart - Wyoming
George W. Karr Jr. - Pennsylvania
James J. Silbernagel - Wisconsin
Timothy H. Holladay - Florida
William V. Regan III - California
Martin T. Berger - Iowa
Randy R. Kilgore - Colorado
Karl E. Hansen - California
Lance B. Kolbet - Idaho
H. Larry Fortenberry - Mississippi
Eleanor B. Blaylock - Louisiana
Alan Press - New York
Michael O. Brown - Oklahoma
David F. Woods - Massachusetts
James R. Christensen Jr. -
Nebraska
John A. Davidson - California
Laura P. DeGolier - Wisconsin
Jack B. Turner - Tennessee
James R. Goodrich - Michigan
Joseph L. Morton III - Idaho
Lawrence J. Stack - Michigan
Michael J. Ables - California
Thomas R. Clark - Iowa
Steven M. Stratton - California
Morland G. McManigal - California
Lisa M. Broadbent - Delaware
Dennis C. Drake - Delaware
Brian R. Phares - Nebraska
Aldous Kawailani Paalani - Hawaii
Bruce C. Hendrickson - Nebraska

Richard A. Koob - Wisconsin
Frank R. Nolimal - Nevada
Carl James Maus - Missouri
Jerrell G. Clay - Texas
Bryon A. Holz - Florida
Van E. Mueller - Wisconsin
David M. Muilenberg - Michigan
Thomas D. Currey - Texas
Charles W. Potts - Oklahoma
John C. Johns - Mississippi
Robert J. Wernecke - Arizona
Ralph E. Van Winkle - Washington
Larry J. Winkelhake - Wisconsin
James A. Shalek - Illinois
Dermot T. Healey - Florida
Alan R. Zalewski - Washington
Michael C. Keenan - Illinois
Darren Scott Mason - California
Mitchell W. Ostrove - New York
Hardy Vaughn Jr. - Florida
Anthony J. Domino Jr. - New York
Dave Skutnik - Nebraska
Gary H. Pendleton - North Carolina
Carol A. Anderson - Nebraska
Charles M. Olson - Nebraska

2018 IFAPAC Fundraising Awards

Congratulations to the 2018 IFAPAC State Award Winners

State Leadership Citation for Overall Fundraising

NAIFA – Missouri

NAIFA – Washington, DC

2018 Total IFAPAC Dollars Raised Top 5 State Chapters

TX	\$156,257
FL	\$137,150
CA	\$131,244
NE	\$105,914
IA	\$100,603

2018 IFAPAC Percent Participation Top 5 State Chapters

ND	44.8%
TN	39.8%
RI	37.3%
SD	36.6%
HI	35.1%

2018 Average IFAPAC Contribution Top 5 State Chapters

AK	\$745.50
DE	\$708.18
DC	\$456.57
ID	\$446.02
NE	\$434.07

Get involved

IFAPAC already has its sights set on the future, and we're working towards building a motivated team to organize action and fundraising for 2020.

To make our values a reality, we need your help.

To learn more about IFAPAC visit:

www.naifa.org/ifapac



Contributions to IFAPAC are voluntary and contributed to candidates for elective office. Your contributions will be divided between your state association IFAPAC and IFAPAC National, if you have directed NAIFA to do so. Club types listed above are merely suggestions. You can contribute more or less than the suggested amount. The amount contributed will not benefit or disadvantage you in any way. You have the right to refuse to contribute without reprisal. Corporate contributions to IFAPAC's political fund are prohibited. Contributions to IFAPAC are not deductible for federal income tax purposes. For NAIFA-Massachusetts members, the division of funds will be 50%/50% up to the state limit of \$500 per calendar year.