



The Corporate Partner Network



Together, we are the leading voice in financial security. Together, we elevate our profession by serving the needs of our members. Together, we protect dreams and promote financial wellbeing for all. Together, we are Finseca.

Together, we are financial security for all.



The Corporate Partner Network

Our world and profession are rapidly changing, and we must change with it. In times of uncertainty, consumers rely on your solutions to help them plan for the challenging times ahead. Through access to education, advocacy, and a collaborative network, you can rely on Finseca to provide you and your financial security professionals with the necessary tools to provide financial security for all.

Finseca's Corporate Partner Network provides vital support of our commitment to elevate, accelerate, and advocate for the financial security profession. With both a profession and consumer facing approach, Finseca is leading the way in elevating the profession, all the while helping to educate Americans on the importance of future planning and financial security.

As the backbone of this transformational organization, The Corporate Partner Network relies on industry leaders to help create an environment that enables people to protect and empowers them to enhance financial well-being — for themselves, their families, and their businesses. Your investment is critical in that mission to ensure that all Americans have access to sustainable financial security.

Who we are

As the voice of the financial security profession, Finseca's mission is to advocate for the financial security profession, develop and grow its leaders, and promote the noble and necessary work our members do to provide financial and retirement security for the individuals, families, and businesses they serve.

With nearly 6,000 members, Finseca represents and serves the entire financial security profession, regardless of role, marketplace, or experience. Finseca members provide life insurance and retirement planning solutions that protect the dreams and promote the prosperity of the American people.



Elevate

Elevate the profession by promoting its noble impact while ensuring it evolves to meet future needs and attract new and diverse talent.



Accelerate

Accelerate education and insights for our members to be able to deliver more personalized advice and solutions to a broad and diverse population.



Advocate

Advocate for effective public policy that puts more people on the path to financial security.



Educate

Promote financial empowerment and advance equality and well being for all through Finseca Foundation research and attracting the next generation of talent.

At Finseca, our **advocacy** agenda is at the core of our mission.

We will protect the issues that your organization and distribution channels care about. Our 2021 advocacy agenda includes:

- Appropriate tax treatment of life insurance
- Retirement policy
- Standards of conduct
- Tackling the savings and liquidity crisis for American families

The Finseca team works tirelessly on the issues our members and members of the entire profession face every day. We educate policy makers about the profession and the value of personalized professional advice that ensures every American can achieve sustainable financial security.



The Corporate Partner Network is comprised of two pillar programs—Partners in Elevation and Partners in Advocacy. Each program is specifically designed with your organization in mind and unique to your business needs and goals.



Partners in Elevation

Providing vital support to Finseca's mission driven initiatives, these corporate partners help to advance the financial security profession while gaining access to benefits that develop and expand each partner's strategic thought leadership.



Partners in Advocacy

Partner with us in maximizing our impact on Capitol Hill on behalf of our members and the client they serve. Our year long program strengthens our advocacy, provides your organization with an insider's view, and amplifies our voice.

Defined by our core pillars, The Corporate Partner Network works with both our corporate partners and solution providers to elevate, advocate, and accelerate our noble profession and unify our voices creating a deeper impact.

Finseca represents the future. Your strategic thought leadership and inclusion in The Corporate Partners Network represents your dedication to not only your clients but to our mission as we collaborate and innovate in ways our profession has never seen.



Partners in Elevation

Providing vital support to Finseca’s mission driven initiatives, these corporate partners help to advance the financial security profession while gaining access to benefits that develop and expand each partner’s strategic thought leadership. *This was formerly the PLG program.*

	Bronze \$10,000	Silver \$25,000	Gold \$50,000	Diamond \$75,000	Platinum \$100,000
Advocacy	Support advocacy on important issues affecting the financial security profession	Support advocacy on important issues affecting the financial security profession	Support advocacy on important issues affecting the financial security profession	Support advocacy on important issues affecting the financial security profession	Support advocacy on important issues affecting the financial security profession
		Monthly Partners in Advocacy webinar	Monthly Partners in Advocacy webinar	Monthly Partners in Advocacy webinar	Monthly Partners in Advocacy webinar
		Monthly Partners in Advocacy recap	Monthly Partners in Advocacy recap	Monthly Partners in Advocacy recap	Monthly Partners in Advocacy recap
Professional development	*Discount on professional development courses for 5	*Discount on professional development courses for 10 seats	*Discount on professional development courses for 20 seats	*Discount on professional development courses for 30 seats	*Discount on professional development courses - unlimited seats
		1 custom educational plan	2 custom educational plan	3 custom educational plans	4 custom educational plans
Events	Discounted virtual networking opportunities	Discounted virtual networking opportunities	Discounted virtual networking opportunities	Discounted virtual networking opportunities	Discounted virtual networking opportunities
	Invitations to exclusive in-person and virtual events	25% in-person booth discount	50% in-person booth discount	75% in-person booth discount	90% in-person booth discount
	2 comp registrations to each digital event	2 comp registrations to each digital event	2 comp registrations to each digital event	2 comp registrations to each digital event	2 comp registrations to each digital event
		Invitations to exclusive in-person and virtual events	Invitations to exclusive in-person and virtual events	Invitations to exclusive in-person and virtual events	Invitations to exclusive in-person and virtual events
				Opportunity for special invitations at our in-person events	Opportunity for special invitations at our in-person events
Thought leadership		Ability to share 1 company white paper	Ability to share 2 company white papers	Ability to share 3 company white papers	Ability to share 4 company white papers
				Creation of custom webinar highlighting your company	Creation of custom webinar series 3 highlighting your company
Marketing/Branding	½ page ad in Finseca Focus	½ page ad in Finseca Focus	One full-page ad in Finseca Focus	Two full page ads in Finseca Focus	Three full page ads in Finseca Focus
	Inclusion in partner marketing on all platforms, website, social, print	Inclusion in partner marketing on all platforms, website, social, print	Inclusion in partner marketing on all platforms, website, social, print	Inclusion in partner marketing on all platforms, website, social, print	Inclusion in partner marketing on all platforms, website, social, print
			Custom social media campaign	Custom social media campaign	Custom social media campaign
Access to experts		Ability to have member of Finseca team participate in 1 virtual corporate speaking opportunity	Ability to have member of Finseca team participate in 1 virtual corporate speaking opportunity	Ability to have member of Finseca team participate in 2 virtual corporate speaking opportunities	Ability to have member of Finseca team participate in 2 virtual corporate speaking opportunities

* Professional development benefits only available to current Finseca members

Partners in Advocacy

Partner with Finseca in maximizing our impact on Capitol Hill on behalf of our members and the client they serve. Our year long program strengthens our advocacy, provides your organization with an insider's view, and amplifies our voice. *This was formerly the Issues Alliance program.*

	Silver \$25,000 - 74,999	Gold \$75,000 - \$149,999	Diamond \$150,000 - \$249,999	Platinum \$250,000 +
Advocacy	Support advocacy on important issues affecting the financial security profession	Support advocacy on important issues affecting the financial security profession	Support advocacy on important issues affecting the financial security profession	Support advocacy on important issues affecting the financial security profession
	Monthly Partners in Advocacy webinar	Monthly Partners in Advocacy webinar	Monthly Partners in Advocacy webinar	Monthly Partners in Advocacy webinar
	Monthly Partners in Advocacy recap	Monthly Partners in Advocacy recap	Monthly Partners in Advocacy recap	Monthly Partners in Advocacy recap
		Co-branded advocacy pieces to be shared on company platform	Exclusive invitations to join Government Affairs Small Working Groups	Exclusive invitations to join Government Affairs Small Working Groups
			Co-branded advocacy pieces to be shared on company platform	Co-branded advocacy pieces to be shared on company platform
			Bi-Yearly call with GA Team	Bi-Yearly CEO call with Mac Cadin
Events	25% in-person booth discount	50% in-person booth discount	75% in-person booth discount	90% in-person booth discount
	Invitations to exclusive in-person and virtual events	Discounted virtual networking opportunities	Discounted virtual networking opportunities	Virtual networking opportunities
	2 comp registrations to both digital events	2 comp registrations to both digital events	2 comp registrations to both digital events	2 comp registrations to both digital events
		Invitations to exclusive in-person and virtual events	Invitations to exclusive in-person and virtual events	Invitations to exclusive in-person and virtual events
			Opportunity for special invitations at Finseca in-person events	Opportunity for special invitations at Finseca in-person events
Thought leadership	Ability to share 1 company white paper	Ability to share 1 company white paper	Ability to share 2 company white papers	Ability to share 3 company white papers
		Creation of custom webinar highlighting your company	Creation of custom webinar series 3 highlighting your company	Creation of custom webinar series 4 highlighting your company
Marketing/Branding	1/2 to 1 full-page ad in Finseca Focus	2 to 3 full page ads in Finseca Focus	3 to 4 full page ads in Finseca Focus	4 to 5 full page ads in Finseca Focus
	Inclusion in partner marketing on all platforms, website, social, print	Inclusion in partner marketing on all platforms, website, social, print	Inclusion in partner marketing on all platforms, website, social, print	Inclusion in partner marketing on all platforms, website, social, print
		Custom social media campaign	Custom social media campaign	Custom social media campaign
Access to experts	Ability to have member of Finseca team participate in 1 virtual corporate speaking opportunity	Ability to have member of Finseca team participate in 2, one virtual and one in person, corporate speaking opportunities (travel cost paid by carrier)	Ability to have member of Finseca team participate in 3, two virtual and one in-person, corporate speaking opportunities (travel cost paid by carrier)	Ability to have member of Finseca team participate in 4, two virtual and two in person, corporate speaking opportunities

Program benefit descriptions

Advocacy – Working on Capitol Hill to lobby on financial security for all – product tax treatment, standards of conduct, advanced markets, retirement policy, and more. Your investment and participation in our programs enhances our message and advances our policy alignment. In addition, it supports our unparalleled grassroots engagement program and helps us expand capacity in grassroots advocacy.

- **First In-Class Advocacy** - Our policy experts advocate on behalf of the profession so you can do business and ensure an environment that allows you to continue to build the futures of your clients.
- **Monthly Advocacy Webinar** – This monthly webinar connects you directly with our advocacy experts, giving you up-to- date information on legislation and regulatory actions impacting our profession, the industry, and our clients.
- **Monthly Advocacy Webinar Recap** – This recap report summaries the monthly advocacy webinar for those unable to participate.
- **Invitation to Join Government Affairs Working Groups** – These small working groups allow one designated participant from each qualifying carrier to engage directly with our advocacy leadership in regular small group discussions about strategic and tactical conversations about the direction of Finseca advocacy.
- **Co-Branded Advocacy Educational Materials** – Co-Branded communications giving your field the ability to advocate on behalf of the profession in their local markets.
- **Bi-Yearly Government Affairs Team Call** - Connect with our Government Affairs Team on the specific issues facing your distribution channels.
- **Bi-Yearly CEO Call** – Elevate the conversation, connecting our CEO Marc Cardin to your leadership where they will discuss the legislative landscape and the specific needs of your field.

Professional Development – Educate, train, and provide financial security professionals with tools to succeed in a changing market, embracing technology, and promoting consumer insights to advance the profession and its opportunities to serve clients better.

- **Discount on Professional Development** – Provide access to innovative Finseca facilitated courses at a discounted rate for current Finseca members.

Thought Leadership – Position yourself as a thought leader within the profession and our membership through distribution of white papers, participation in webinars, and other custom opportunities.

- **Ability to Share Your Company White Papers** – Share your company's white papers and research with the Finseca membership through an email campaign and in our member portal resource library.
- **Webinar Series** – Finseca will be offering 45-minute monthly webinars on topics of key interest to our members in formal and non-formal settings, that will help raise the bar on product, services, sales strategies, and innovations. We invite a senior executive from your company to join our series as a thought leader in your field in order to educate and accelerate our members.
- **Custom Educational Plan** – Developed by a Finseca Learning and Development expert, this plan utilizes our asynchronous learning.

Access to Experts – We can provide our expertise and knowledge direct to your team through keynote presentations by our in-house policy experts or our outside counsel. *Subject to availability.*

- **Finseca's Experts in Residence** – Access our advocacy and subject matter experts to speak at your events and conferences.
- **Exclusive Congressional Speakers Bureau** – Work with our Government Affairs team to obtain a Member of Congress to speak at your events and conferences.

Marketing/Branding – Promote your company and your dedication to the profession through marketing and branding opportunities.

- **Inclusion in Finseca Focus** – Finseca's *brand new* membership magazine distributed to all 6,000+ members in both print and digital 6x a year.
- **Partner Marketing** – Prominent placement on all platforms including website, social, and print showing your dedication to the profession and the Finseca mission.
- **Custom social media campaign** – Work with the Finseca team to create a social media plan that highlights your partnership and promotes the accomplishments of your distribution channels.
- **Inclusion in Partner Highlight Email to membership** – Email sent to all Finseca members introducing our solution providers

Events – Network and connect with fellow member through our virtual & in-person events.

- **Virtual Networking Events** – Work with our team to develop a unique virtual experience to connect and network with a exclusive curated group of industry professionals.
- **In-Person Exhibit Booths** – Showcase your company and the unique products through a virtual booth on Intrado platform or a 10x10 booth at in-person event exhibit hall.
- **Discounts on Additional Event Sponsorship** – Discounts on sponsoring marketing, networking, branding, and other event opportunities.
- **Event Registrations** – Complimentary registrations to events in which you have an exhibit booth.

By joining The Corporate Partner Network, you join a league of the industry's elite carriers and solution providers. You join in Finseca's mission dedicated to the advancement of the profession. A mission we must unify and realize together.

Together, we are the leading voice in financial security. Together, we elevate our profession by serving the needs of our members. Together, we protect dreams and promote financial wellbeing for all. Together, we are financial security for all.

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