

Key Terms of the NAIFA – IDIS Strategic Partnership

Effective DATE

I. Overview of the Partnership

The National Association of Insurance and Financial Advisors (NAIFA) and the International DI Society (IDIS) have entered into a strategic partnership to strengthen the disability income insurance (DI) profession and expand their collective reach and impact. As of the Effective Date, all eligible IDIS members will become NAIFA members and gain access to NAIFA benefits and resources, while IDIS will be recognized as a Center of Excellence within NAIFA. The IDIS brand and identity will be part of this Center, providing specialized education, advocacy, and networking for professionals in the DI space.

II. Membership

All IDIS members will be transitioned into NAIFA membership and receive full NAIFA benefits. IDIS members will be classified as NAIFA-IDIS members and, upon renewal, will follow NAIFA's dues structure. NAIFA members will also gain access to IDIS Center programming and offerings. IDIS will no longer charge separate dues for membership, and NAIFA will manage all renewals going forward.

III. Structure of the IDIS Center within NAIFA

The IDIS Center will retain its distinct identity and programming focus within NAIFA. The IDIS Board, consisting of current IDIS membership leaders, will provide guidance and content leadership for the Center. The IDIS Board will also serve as a sounding board for NAIFA's Government Relations team on DI-related issues.

IV. Events and Sponsorship

IDIS will continue to operate its annual conference and manage its corporate sponsorship program through its separate Board. NAIFA will support the promotion of the IDIS conference and explore opportunities for additional sponsor engagement across both organizations.

V. Branding and Intellectual Property

The IDIS name, logo, and brand will remain active and be used in connection with its Center within NAIFA. Both organizations will retain ownership of their respective intellectual property. A limited, revocable license allows for appropriate use of each other's names and marks solely for the purposes outlined in the partnership.

VI. Communications and Web Presence

The partnership will be jointly announced via a formal press release. NAIFA will create and maintain a dedicated section for the IDIS Center on its website, and both parties will cross-promote the partnership across marketing channels and at events.

VII. Governance and Leadership

The IDIS Center within NAIFA will be advised by the IDIS Board of Directors, elected by IDIS, and responsible for DI-specific programming, policy input, and volunteer engagement.

VIII. Staffing and Support

NAIFA staff will provide operational and strategic support for the IDIS Center. IDIS will retain additional association management resources may be engaged as needed.

IX. Historical Recognition

IDIS shall continue to maintain a history of IDIS leadership, including a listing of past presidents and award recipients. Recognition will be preserved through the IDIS website, archives, and at key events.

X. Term and Continuity

This partnership remains in effect unless modified by mutual agreement or terminated by either party in accordance with the Partnership Agreement. IDIS

members who become NAIFA members will retain their individual membership status unless cancelled voluntarily.