

Summary Sheet: NAIFA & IDIS Partnership Agreement

Effective Date: TBD

Parties:

- International DI Society (IDIS)
- National Association of Insurance and Financial Advisors (NAIFA)

Purpose of Agreement

To form a strategic partnership to expand membership, leverage strengths in disability insurance, and jointly promote education, advocacy, and professional development.

Key Terms & Highlights

1. Membership Integration

- All IDIS members will become NAIFA members and receive full NAIFA benefits.
- IDIS will become a “Center of Excellence” within NAIFA focused on disability income insurance (DI).
- NAIFA will manage all membership dues going forward; IDIS dues will phase out.

2. IDIS Center & Governance

- The IDIS Center will retain its branding and logo under the NAIFA umbrella.
- An **IDIS Advisory Board** will guide DI-related content and programming.

- The **IDIS Board** will remain in place to oversee the IDIS conference and sponsor program.

3. Joint Promotion

- Both organizations will co-promote the partnership via digital channels, in-person and virtual events, and social media.
- NAIFA will launch an IDIS Center web presence and integrate IDIS into its members-only benefits.

4. Term & Termination

- Agreement will renew annually unless either party gives 90 days' notice.
- Either party may terminate with written notice at any time.

5. Intellectual Property

- Both parties may use each other's branding for partnership purposes.
- NAIFA will retain ownership of any jointly created intellectual property.

6. Confidentiality & Indemnification

- Both parties agree to protect each other's confidential information.
- Each party is responsible for indemnifying the other against claims resulting from its own actions.

7. Future Collaboration

- Agreement will allow for continued growth and the potential for deeper integration over time.