

2024 CEFLI Affiliate Member Organization Benefits



Since its inception in 2011, CEFLI has been a nonprofit, nonadvocacy organization dedicated to serving the needs of the life insurance industry's Compliance & Ethics professionals

CEFLI Member Life Insurance Companies

Since its inception, the number of CEFLI Member life insurance companies has grown from 20 companies to 93 companies (plus their life insurance company affiliates).

Data as of 05/06/24

Premier Partner Member Companies | Member Companies



Gold Affiliate Member Organizations

CEFLI Gold Affiliate Member dues are \$25,000 per year. Gold Affiliate Members benefit from:

CEFLI BOARD OF DIRECTORS

- **Eligible to serve** on the CEFLI Board of Directors

ANNUAL CONFERENCE

- **Logo placement** on event signage
- **Recognition/logo placement** during the opening remarks on each day
- Invitation to serve on the **faculty**
- **Unlimited complimentary registrations** to the conference
- **List of Attendees** (name/ title/ company) two weeks in advance
- **Priority access** to options for **event sponsorship**

CEFLI CCO FORUM

- One person may attend CEFLI's exclusive CCO-only event
- The individual receives **complimentary registration**

EDUCATIONAL WEBINARS

- **First priority** for date selection
- Ability to **invite your clients**
- Ability to **post the recorded webinar** to your firm's website
- **Unlimited, complimentary access** for staff to attend webinar events
- **Recognition/logo placement** during the opening remarks

FUNDAMENTALS AND ADVANCED TRAINING EVENTS

- **Recognition/logo placement** during the opening remarks
- **Unlimited complimentary registrations** to the events

CEFLI WEBSITE

- **Logo, contact information and description of services** on CEFLI.org
- Access to **Benchmarking Surveys, recorded webinars and past event materials**

Silver Affiliate Member Organizations

CEFLI Silver Affiliate Member dues are \$15,000 per year. Silver Affiliate Members benefit from:

ANNUAL CONFERENCE

- **Logo placement** on event signage
- **Recognition/logo placement** during the opening remarks each day
- Invitation to serve on the **faculty**
- **Unlimited complimentary registrations** to the conference
- **Advance access to the list of attendees** (name/title/company) two weeks prior to the event
- **Second priority access** to options for event sponsorship

FUNDAMENTALS AND ADVANCED TRAINING EVENTS

- **Recognition/logo placement** during the opening remarks
- **Two complimentary registrations** to each event

EDUCATIONAL WEBINARS

- **Second priority** for date selection
- Ability to **invite your clients** (coordinate with Carla Strauch)
- **Unlimited, complimentary access** for staff to attend webinar events
- **Recognition/logo placement** during opening remarks

CEFLI WEBSITE

- **Logo, contact information and description of services** on CEFLI.org
- Access to **Benchmarking Surveys, recorded webinars** and **past event materials**

Note: Unlike Gold Affiliate level benefits, Silver Affiliate level benefits do not include: 1.) the potential to serve on CEFLI's Board of Directors; 2.) access to attend CEFLI's exclusive CCO Forum event; 3.) unlimited registrations to CEFLI's Compliance Fundamentals Training Conference (CFTC) and CEFLI's Advanced Compliance Forum (ACF) events; or 4.) permission to post the recording of the Affiliate-sponsored webinar to the Affiliate firm's website.

Bronze Affiliate Member Organizations

CEFLI Bronze Affiliate Member dues are \$5,000 per year. Bronze Affiliate Members benefit from:

ANNUAL CONFERENCE

- **Logo placement** on event signage
- **Recognition/logo placement** during the opening remarks each day
- Potential opportunity to serve on the **faculty**
- **Two complimentary registrations** to the conference
- **Event sponsorship** opportunities

EDUCATIONAL WEBINARS

- Opportunity to **conduct a webinar**
- **Unlimited, complimentary access** for staff to attend webinar events
- **Recognition/logo placement** during the opening remarks

CEFLI WEBSITE

- **Logo, contact information and description of services** on CEFLI.org
- Access to **Benchmarking Surveys, recorded webinars** and **past event materials**

FUNDAMENTALS AND ADVANCED TRAINING EVENTS*

- **Recognition/logo placement** during the opening remarks
- **One complimentary registration** to each event

*Note:

- Unlike **Gold Affiliate** level benefits, Bronze Affiliate level benefits do not include: 1.) the potential to serve on CEFLI's Board of Directors; 2.) access to attend CEFLI's exclusive CCO Forum event; 3.) unlimited registrations to CEFLI's Compliance Fundamentals Training Conference (CFTC) and CEFLI's Advanced Compliance Forum (ACF) events; or 4.) permission to post the recording of the Affiliate-sponsored webinar to the Affiliate firm's website.
- Unlike **Silver Affiliate** level benefits, Bronze Affiliate level benefits do not include: 1.) unlimited registrations to CEFLI's Annual Conference; 2.) advanced access to the list of attendees (name/title/company) for CEFLI's Annual conference (attendee information may be accessed from the event website a few days prior to the event); 3.) two complimentary registrations to CEFLI's Compliance Fundamentals Training Conference (CFTC) and CEFLI's Advanced Compliance Forum (ACF) events (one complimentary registration for each event is included); or 4.) the ability to invite the Affiliate's clients to the Affiliate-sponsored CEFLI Educational webinar.

Our Team



Donald Walters
President & CEO
DonaldWalters@CEFLI.org



Carla Strauch
Senior Vice President,
Compliance & Ethics
CarlaStrauch@CEFLI.org



De Keimach
Vice President, Compliance
& Ethics
DeKeimach@CEFLI.org



Mallory Hart
Director of Member Relations,
Communications & Meetings
MalloryHart@CEFLI.org



Nancy Perez
Executive Secretary & Office
Manager
NancyPerez@CEFLI.org



Thank you

We value your partnership with CEFLI.

If you have any questions, please do not hesitate to contact **Mallory Hart**, Director of Member Relations, Communications and Meetings at MalloryHart@CEFLI.org or another member of the CEFLI team.

We are here to help!