

II. EDUCATION

- 1. High School Graduate or GED? _____ Yes _____ No
- 2. Undergraduate College(s) _____ Degree(s) _____ Major(s) _____
- 3. Post Graduate College(s) _____ Degree(s) _____ Major(s) _____
- 4. Other Education _____

III. NON INDUSTRY ACTIVITIES

- 1. Describe your most important past and current volunteer service in civic, political, religious or other organizations over the last five years. Cite what you did, the degree of your involvement, specific results and any awards or citations received.

ORGANIZATION	POSITION HELD	LENGTH OF INVOLVEMENT FROM – TO	AMOUNT OF TIME YOU SPENT / SPEND	RESULTS OR ACCOMPLISHMENTS (IF APPLICABLE)
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

- 2. Describe your anticipated involvement and goals for the next 3 – 5 years.

IV. INDUSTRY ACTIVITIES

1. Describe your past and current volunteer involvement in any financial services industry organization (e.g. Local Association of Insurance and Financial Advisors, MDRT, SFSP, GAMA, FPA etc.).

INDUSTRY ORGANIZATION	POSITION HELD	LENGTH OF INVOLVEMENT FROM – TO	AMOUNT OF TIME YOU SPENT / SPEND	RESULTS OR ACCOMPLISHMENTS (IF APPLICABLE)
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

2. Describe your anticipated involvement and goals for the next 3 – 5 years.

IV. FINAL QUESTIONS

1. Describe your image of an excellent leader.

FINAL QUESTIONS (Continued)

2. Why do you want to be selected for the Leadership In Life Institute?

3. What do you consider the major reason you should be selected?

4. What do you hope to gain from participation?

5. Acceptance in this institute is contingent upon your agreement to volunteer 2 years of service at your local AIFA. Are you willing and able to make a 2-year commitment to your local AIFA? Please explain.

6. Have you ever been the subject of any insurance or securities regulatory investigation or action? _____ If yes, attach details.

7. How many years of financial services experience do you have? _____ (2 year minimum requirement for admission to LILI)

8. Commitment Statement

I understand the purpose of the NAIFA-California Leadership in Life Institute and if I am selected, I will devote the time and resources necessary to complete the program. I have sought and received the full support of the important people in my life, including my employer. I understand that even though emergencies do arise, I am expected to attend every session. I understand if I miss more than one (1) segment for whatever reason, I will be asked to withdraw from the program and no portion of tuition will be refunded.

I certify that all of the statements made in this application are true, complete, and correct to the best of my knowledge and are made in good faith. I know and understand that all items herein may be verified. If selected, I have company / organization support for my participation. I will be able to attend all six (6) seminars in their entirety.

Candidate Signature

Date

Print Your Name