



**LEAD THE CONVERSATION.**



YOUR **WINDOW**  
TO THE FUTURE



## ABOUT LISA

The Life Insurance Settlement Association (LISA) was established in 1994 and is the oldest and largest association in the life settlement market. LISA members consist of brokers, providers, financing entities and service providers.

LISA has played a key role in developing legislation and regulations which serve as the foundation for an open, transparent and competitive market for the transaction of life settlements. LISA's mission is to advance the highest standards of practice and professional development for the industry, and to educate consumers and advisors about a life settlement as an alternative to lapse or surrender of a life insurance policy.

The life settlement industry is a dynamic marketplace representing the needs of life insurance policy owners and LISA is proud to serve as its leading voice.



## MEMBERSHIP

LISA membership is the best option for firms that desire to benefit from the influence, activities and services LISA provides to the life settlement industry. As a member, you gain access to the industry's latest news, developing research, reference materials and benefit from discounted conference rates, providing you significant financial benefit. Being a member of LISA also gives you a voice of influence in the industry among legislators, regulators and other governmental bodies.

As a member of LISA, your membership extends to your employees and coworkers. Your membership also grants voting rights to your designated member representative, provides an opportunity to participate in committee activities and become a candidate for the Board of Directors. The annual cost of membership is \$8,500.



## BENEFITS

One of the most important benefits of being a member is the opportunity to interact and network with other LISA Members, especially to exchange ideas and discuss important developments. This membership category is also designed to be the most effective in helping you market and promote your business. Simply put, being a member of LISA gives you the advantage of distinction.

As a member, you become part of a distinct group of firms that along with Board members and staff have led a charge of focused activities, legislative influence, conference activities and policy positions that have created a consumer-friendly secondary market where seniors may sell their unwanted, unneeded and unaffordable life insurance policies.

LISA members are held to the highest ethical standards in business practices. They also pledge to improve public information and awareness, resulting in a healthy industry, strong individual businesses, and better service to consumers.





## POWER OF KNOWLEDGE



### OTHER IMPORTANT BENEFITS INCLUDE:

#### MEMBER ALERTS

You will receive e-mail alerts with breaking news and up-to-the minute updates so you can react quickly when and where needed.

#### E-NEWSLETTER

The LISA weekly e-newsletter provides you with concise updates on the most recent developments in the industry and upcoming member industry events so you can stay abreast of important and valuable information.

#### WEBSITE

LISA offers you an exclusive website with 24/7 access to an unparalleled array of information important and valuable to you and your business, including:

- Currently proposed and enacted state and federal laws;
- Emerging regulatory developments in the industry;
- Important legal decisions;
- The latest actions by state and federal legislative bodies; and
- Industry research and white papers.

## ONLINE LICENSE MATRIX

As a member, you gain exclusive access to the License Matrix, which lists all the LISA member companies, the types of licenses they hold and the states within which they are licensed. This gives consumers confidence in working with your company because the states in which you are licensed are publically displayed. Additionally, the License Matrix tracks and stores all your license information in one place saving you from developing and maintaining your own proprietary system, thus reducing your costs, resources and labor. As an additional benefit, the License Matrix sends automated reminders when your licenses are nearing expiration.

## ONLINE LEGISLATIVE AND REGULATORY TOOLS

LISA's exclusive website provides you with legislative and regulatory information that will save you valuable time and compliance expenses because this information is readily available to you on the LISA website.

As a member, you enjoy access to all state and federal applications, forms and required materials. Current state laws and regulations are easily accessible for reference. You are also informed on the movements of non- and quasi-governmental organizations including NCOIL, NAIC, ACLI, NAIFA and more. Additionally, you can access and comment on documents from these organizations and access, track and comment on proposed legislation.

## LIFE SETTLEMENT NEWS ROOM

The Newsroom is a journalism archive with news and articles from various sources, including LISA press releases, and relevant blogs - all of which are updated which are continually updated. The Newsroom will serve as your comprehensive source for important published industry developments and as a valuable research tool.



## LIFE SETTLEMENT EDUCATION

LISA can provide you with approved content that you can use as marketing tools to host events and presentations for potential clients.

Another benefit is that LISA can also help you with education compliance required by different state departments of insurance, Certified Financial Planner Board of Standards, National Association of State Boards of Accountancy and state bar associations. Examples of compliance requirements include handling the certification of instructors, scheduling of courses, sign-in sheets, evaluation forms, advertising compliance, credit reporting, certificates of completion and archival of documents.

As a member, you can benefit personalizing LISA's content with your company's logo. With LISA's

endorsement and co-branding, your education content will be perceived as of a higher caliber and you will have a competitive edge, along with an additional avenue to generate leads.

## CONSUMER RECOGNITION

Both consumers and advisors use the LISA website to search for resources and information to educate themselves on life settlements. By becoming a member, your public information is displayed giving you a direct connection to consumers and advisors, acting as a lead generating tool.

As a member, you can use the LISA logo on your website and printed materials for branding so your customers know that you are a part of the industry's largest and most influential life settlement association whose members abide by the highest standards of practice. You also get exclusive social media mentions.

### CONFERENCE CALLS

LISA Conference Calls give you the opportunity to participate in discussions regarding current industry topics, important legislative and regulatory developments and other relevant issues. An agenda is posted in advance so you can access all the content prior to the call and also decide if you wish to participate. Current members have found the conference calls to be very useful and informative allowing them to benefit from the experience and knowledge of their peers, which saves them time, money and resources.

### EVENTS

As a LISA member, you will benefit from reduced registration fees for LISA conferences. These informative conferences include issue-specific presentations, breaking industry research, informative discussion panels, continuing education credits and offer you an opportunity to interact and network with other LISA members, especially to exchange ideas, learn from each other and discuss important developments. You also gain access to members-only events, including summits, forums and seminars to stay up-to-date in the life settlement industry.

### NY PUBLIC AWARENESS CAMPAIGN

As a member, you are eligible to participate in the LISA Public Awareness Campaign for fraud prevention, which has been approved by the New York Department of Financial Services. The Campaign is designed to satisfy provision §409(c) (5) of the New York law for licensed Settlement Providers. By participating in this program, you avoid the necessity to develop your own anti-fraud plan required by New York law, potentially saving you thousands of dollars.

Only licensed Life Settlement Providers who are members of LISA and agree to the awareness requirements established by LISA will qualify and receive credit from the New York Department of Financial Services for their participation.

### EXCLUSIVE MEMBER DISCOUNTS

The association also offers access to third parties who provide exclusive discounts on products and services that help promote and manage your business.



JOINING LISA IS NOTHING SHORT OF A SMART DECISION

