

# 125-Year-Old National Financial Services Organization Inducts First Female President at Industry Conference and Exhibition

*Juli McNeely of Spencer, Wis., becomes 2014-2015 president of National Association of Insurance and Financial Advisors*

SAN DIEGO — The National Council of the Falls Church, Va.-based National Association of Insurance and Financial Advisors will induct Juli McNeely as 2014-2015 president of the 40,000-membership organization. McNeely, CFP®, CLU, LUTCF, 45, is the first female executive to take the helm in the organization's 125-year history. She will become president on Monday, Sept. 8, during NAIFA's Annual Conference in San Diego.

McNeely's success as owner and president of the Spencer, Wis.-based McNeely Financial Services and her ascension to the NAIFA presidency are at the front of an emerging trend of women becoming more prominent in the traditionally male-dominated financial services profession.

A recent study by Cerulli Associates found that women now make up 11.5 percent of all financial advisors, an increase from 7.9 percent in 2012. Women make up just over 17 percent of NAIFA's membership.

"There are far more women in the industry today than there were when I started 18 years ago, but we still have a long way to go," McNeely said. "More women are becoming the financial decision makers in their households, so the need for female financial advisors is growing. Many consumers want to work with someone who can relate to them. It's time we recognize the need to recruit in all demographics in this industry so that we are better equipped to serve the public."

NAIFA members primarily serve [main street](#), or middle market consumers. A new [report](#) released this week offers a portrait of NAIFA members and how they serve their clients.

*About Juli McNeely:*

- In 1996, she joined [McNeely Financial Services](#), a firm founded by her father.
- She served as President NAIFA-Central Wisconsin (2003-2004) and NAIFA-Wisconsin (2007-2008).
- She was elected by her peers to NAIFA's Executive Council in September 2012.

McNeely will be inducted during NAIFA's [Career Conference](#) and Annual Meeting, held Sept. 6-8 at the Manchester Grand Hyatt in San Diego. The 2014 conference also will serve to kick off NAIFA's [125th anniversary](#) – which will be noted with events and stories told throughout the year. Look for coverage of conference sessions to be posted regularly on the Advisor Today [blog](#) and [naifablog.com](#).

## Press Credentials

Members of the working press can request press credentials by contacting Sheila Owens at [sowens@naifa.org](mailto:sowens@naifa.org) or Mark Briscoe at [mbriscoe@naifa.org](mailto:mbriscoe@naifa.org).

## Interviews

Juli McNeely and NAIFA officers and leaders will be available for interviews on industry issues before or during the conference.

More event news and photos will be posted the following:

[twitter.com/naifa](https://twitter.com/naifa)

[facebook.com/NAIFANational](https://facebook.com/NAIFANational)

<http://www.linkedin.com/NAIFANATIONAL>

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**About NAIFA:** Founded in 1890 as The National Association of Life Underwriters (NALU), NAIFA is one of the nation's oldest and largest associations representing the interests of insurance professionals from every Congressional district in the United States. NAIFA members assist consumers by focusing their practices on one or more of the following: life insurance and annuities, health insurance and employee benefits, multiline, and financial advising and investments. NAIFA's mission is to advocate for a positive legislative and regulatory environment, enhance business and professional skills, and promote the ethical conduct of its members.