

# Momentum With Purpose

## Annual Report

2025



NATIONAL AFRICAN AMERICAN  
INSURANCE ASSOCIATION



It's Time,  
**Let's Go!**





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# Our Leadership

## A Word from the Board Chair

Throughout 2025, our members, chapters and staff steadfastly carried out NAAIA's mission in an increasingly complex and demanding environment. Despite shifting priorities and economic pressures, our commitment to strengthening pathways for professional growth, developing leaders, and building a stronger NAAIA never wavered.

When challenged, NAAIA rose to the occasion in no small part due to the support of our Partners, event sponsors, and volunteers who chose to stand with NAAIA and invest in our community. Your continued engagement has been essential to sustaining our momentum toward shaping an industry that reflects the world in which we live.

On behalf of the National Board, thank you for your trust and commitment to NAAIA.

**Ricky C. Jones**

National Board Chair



## A Message from the President & CEO

**It's Time! Let's Go!** We started 2025 off to the races, welcoming 10 new chapters to the NAAIA family, our largest cohort ever. This was a key moment of progress that made real the goals within our *Vision 2030* Strategic Plan. Through more program offerings, strengthened infrastructure, and deeper engagement with our members, we continued building an community designed for meaningful impact now and in years to come.

Our progress was powered by 400+ volunteer leaders across our chapters, committees, and national councils. Their dedication made it possible to deliver high-quality experiences and support career development and advancement at every stage.

Thank you. I am so proud of each of you. You make me proud to be a NAAIA member.

**Omari Aarons-Martin**

President & CEO





# Who We Are

## OUR STORY

For nearly three decades, NAAIA has expanded access to opportunity, leadership, and community within the insurance industry. Founded in 1997 to support Black professionals and our allies, we are a national association with a strong chapter network, trusted programming, enduring corporate partnerships, and growing influence around the globe.

Guided by our *Vision 2030* strategic plan, NAAIA continues to build momentum by connecting talent to opportunity, elevating underrepresented voices, and preparing the next generation of leaders to shape the future of insurance.

## OUR MISSION

NAAIA is on a mission to diversify the insurance industry's talent landscape at every level. Our focus is the professional development and personal empowerment of our members, and to serve as a gateway to diverse talent at every level of the industry.

## NAAIA IN NUMBERS

**33**

**chapters** across  
the United States.

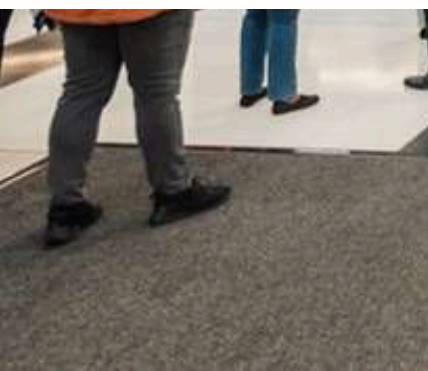
**3,300+**

**members** from every  
industry sector and  
level.



**790+**

Virtual **Leadership  
Summit** Series  
attendees.



**2,600+**

**Advancing Inclusion  
Webinar Series**  
attendees.

**97.4%**

Of members would  
**recommend**  
**NAAIA** to a friend  
or colleague

**70**

participants in  
inaugural **NEXT  
Mentorship** Program



# Momentum With Purpose

2025 marked a defining moment for NAAIA. It **brought to a close years of rapid transformation** – building new systems, expanding programs, and reimagining how we serve our members – and moved us into **a new chapter shaped by focus, stability, and intention**. *Momentum with Purpose* captures this shift perfectly: progress that is no longer reactive or experimental, but deliberate, accountable, and deeply rooted in mission.

That momentum was visible across the organization. NAAIA expanded our national footprint with the launch of **ten new chapters**, strengthening our presence across the country. We transitioned to a **President and CEO-led model**, positioning NAAIA for long-term sustainability. And in Philadelphia, more than 1,300 professionals gathered for our National Conference – again, the largest in NAAIA’s history – affirming both **the relevance of our mission and the strength of our community**. Just as important, 2025 was a year of investment. We continued to **build leadership pipelines** that are intentional and inclusive, and expanded access to digital platforms for thought leadership and industry recognition.

None of this progress happens in isolation. Nearly **400 volunteer leaders power NAAIA’s work every day**, alongside a committed national staff and a still growing network of Partners and sponsors. Their service, collaboration, and shared accountability are what allow momentum to be sustained—not just celebrated.

*Momentum with Purpose* is both a reflection and a charge. It affirms that NAAIA is not growing for growth’s sake. **We are stewarding what we have built with care, clarity, and confidence**. As we move forward, NAAIA remains committed to strengthening pathways to leadership, expanding access to opportunity, and shaping a future where more Black professionals in insurance don’t just participate in the industry—we help lead it.





# VISION<sup>2030</sup>

## OUR ROADMAP FOR NAAIA'S FUTURE

NAAIA's Strategic Plan is designed to guide our growth, confront challenges related to the recruitment, retention and advancement of Black and African American industry professionals, and address persistent wealth and access disparities within the Black community through education and empowerment.



### NAAIA Today 3300 members

33 chapters and growing in every major financial center across the US.

### \$2.75MM revenue

Funding supports operations, staffing and programs.

### \$110K scholarships

\$40K in Talent Competition awards and \$70K to J.L. Tillman Scholars.

### 90+ Partners

Partner network includes the leading insurance companies and organizations.

### NAAIA Tomorrow 7500 members

50 professional chapters and 25 student chapters across the US, and 5 global affiliates.

### \$3.8 MM revenue

Expanded programs by career stage and discipline.

### \$500K social impact

Increased scholarships and investments in industry non-profit organizations.

### 150+ partners

Expanded partner network increases talent mobility and advancement.



## OUTCOMES

1

Insurance as a **career of choice** for Black Americans

2

Insurance as a **trusted tool** for growing and protecting generational wealth

3

Insurance as a key driver in **closing the racial wealth gap**



# MEMBERS FIRST

In 2025, NAAIA expanded how we amplified the voices of our members inside NAAIA and across the industry. This focus was brought to life through enhanced digital platforms, storytelling initiatives, and member recognition across industry media and publications. Visibility, a lever for advancement and signal of leadership readiness, was intentional and strategic, making it easier for members to see themselves, their chapters, their leadership and volunteer service, and their expertise reflected across the organization, and to see NAAIA across the industry.



10 **Member Profiles** in our monthly newsletter represented the full diversity of our membership, from industry veterans and emerging leaders to independent agents and corporate function leaders.

NAAIA and Insurance Business America partnered on our **Meet the Executive Series** and lifted the career and community impact stories of eight members,



The launch of the **NAAIA e-Store** in July made high quality, wearable and branded merchandise accessible for members to showcase their NAAIA pride.

The NAAIA Detroit Chapter celebrated its **20<sup>th</sup> anniversary** with style and honoring Michigan-based industry leaders and members who have been instrumental in founding and sustaining the chapter.

Recognition was the name of the game in 2025! **20+ NAAIA members** received nods from Insurance Business America as Rising Stars, Elite Women and the Hot 100. NAAIA Cleveland's **Diauntae Morrow** and **Tyzha Gunn** were honored as **RISE 35 under 35** and NAAIA Phoenix's **Adrian Davis** received **RISE's Mentor of the Year** (below, right). NAAIA Founder **Jerald L. Tillman** received the **Alonzo Herndon Award** from Business Insurance and the **Lifetime Achievement Award** (below, left) from the Ohio Insurance Agents Association.





# PROGRAM HIGHLIGHTS

## VIRTUAL SUMMITS

The Leadership Summit Series is NAAIA's signature platform for intensive leadership development, career planning, and insightful dialogue. For its ninth year, **National Leadership Summit** participants were led on a two-day discovery facilitated by **Christy Rutherford**, Founder of Vision Finder International.



Offered virtually for the first time, the **Agent + Broker Summit** and the **Emerging Leaders Summit** focused on personal and business growth and career mobility. Feedback across the Series showed a strong impact: overall satisfaction was 92%; 89% of attendees left with tools they could immediately apply in the workplace; and 84% committed to seeking out new networking opportunities and mentorship.

## REGIONAL FORUMS

NAAIA chapters in **Chicago, Kansas City** and **Washington, DC** hosted our day-long Regional Forums. Themed **"Cultivating Leaders of Tomorrow: Transforming Organizations and Communities,"** Forums reinforced NAAIA's grassroots impact and commitment to building strong, locally engaged professional communities.

Attendees praised the Forums for their intimate, relationship-driven format, with 91% describing them as valuable for peer networking and mentorship discovery.



## NATIONAL TALENT DEVELOPMENT COMPETITION

In October, NAAIA hosted its 10th Annual **National Talent Development Competition**. Nearly 40 undergraduate students from eleven schools participated. Over two days, students presented their response to our case study on **insuring the content creator economy**, demonstrating their analytical, communication, and leadership skills.

The **University of Georgia Terry College of Business** team, sponsored by **Marsh**, claimed **first place**, with each student receiving a \$1,500 cash award. The competition supports NAAIA's mission to develop future industry leaders, as evidenced by several competition alums serving as coaches this year.





# PROGRAM HIGHLIGHTS

## ADVANCING INCLUSION WEBINAR SERIES

The Advancing Inclusion Webinar Series is NAAIA's primary offering to the industry. Free and open to the public, the Series ensures that education and insight remain accessible to a broad audience. Across sixteen sessions within the **Embracing Diversity** and **NAAIA Academy** tracks, attendees engaged with dynamic panelists and one another, with 97% reporting an intention to attend future programs—citing the series' cultural relevance and strong sense of belonging.



## NAAIA ON THE MOVE

From **RISKWORLD** in Chicago and the **APCIA Emerging Leaders Conference** in Tampa, to the **Quad A VISION Conference** in DC, **RISE Professionals Leadership Summit** in Orlando, and the **National Insurance Conference of Canada** in Ottawa, NAAIA members took the stage—contributing insight, perspective, and lived experience to critical conversations shaping the future of insurance.



## NURTURING EXCEPTIONAL TALENT (NEXT) MENTORSHIP PROGRAM

**Who's got NEXT?** Built in response to NAAIA Census feedback, the NEXT Mentorship Program launched in 2025 with 30+ mentor-mentee pairings spanning every career level. Over the ten-months journey, participants focused on goal setting, strategic networking, and the development of inclusive leadership skills through a guided curriculum.

As part of the experience, participants were invited to **Executive-in-Residence** Leadership Labs: senior leaders in unfiltered, authentic conversations about career navigation, leadership, and mentoring. Executives **Rod Patterson** of Crum & Forster, **Leonardo Dionicio** of Sun Life, **Will Rodriguez** of Sompco, and **Martin South** (left) President & CEO of Marsh, engaged participants with candor, humor, and hard-earned insight, bringing leadership lessons to life.



# 2025 NAAIA NATIONAL CONFERENCE

In September, more than 1,300 professionals gathered in Philadelphia for the NAAIA National Conference, centered on the theme ***"Vision Forward: Driving Transformation in Insurance."*** The conference brought the industry together for learning, connection, and celebration.



**Dr. Eddie Glaude, Jr.** (left) delivered a powerful and engaging opening keynote, ***We Are the Leaders We've Been Waiting For.*** One of the nation's most prominent scholars and authors, Dr. Glaude charged all attendees to assess their values, take action to improve the world around them and recruit others to do the same.



Attendees heard from more than 100 speakers, including Marsh McLennan President & CEO **John Doyle** and The Hartford CEO & Chairman **Christopher Swift** (above, middle) With 35+ workshops and meet ups covering leadership development, industry trends, and career advancement, our National Conference offered something for everyone!



The Conference culminated in NAAIA's annual Gala & Awards, honoring outstanding leaders whose significant contributions demonstrate excellence across the industry. Award recipients included **NAAIA Central Virginia** (Chapter of the Year) **Diauntae Morrow** (Emerging Leader), **Rodney Patterson** (Corporate Leader) (r), **Traci Adedeji** (Agent Broker Leadership Excellence), and **Jeff Gallimore** (Lifetime Achievement) (above, middle).





# CHAPTER HIGHLIGHTS





# CHAPTER HIGHLIGHTS





# 2025 FINANCIAL SUMMARY

financials

## REVENUE

Partnerships	\$1,555,000
Scholarships + Awards	\$52,800
Registrations	\$626,000
Memberships	\$300,000
Misc. Income	\$217,000
Surplus Funds	\$461,200
<b>Total Revenues and Profits</b>	<b>\$3,212,000</b>

## EXPENDITURE

Membership	\$253,700
Programs	\$383,400
National Conference	\$1,235,000
Marketing	\$158,000
Scholarships + Awards	\$34,000
Technology	\$391,500
National Office	\$834,000
<b>Total Cost</b>	<b>\$3,289,600</b>

**Net Revenues and Profits** **-\$77,600**

*Report captures financial results up to December 1 with forecasted expenses through December 31, 2025. Actual results may vary.*



## National Board of Directors



**Executive Committee**  
**Ricky C. Jones**  
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**Susan Johnson**  
*Vice Chair*

**Rebekah Ratliff**  
*Secretary*

**James Hutchinson**  
*Treasurer*

**Jerald L. Tillman**  
*Founder*



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**Dwight Geddes**  
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*Chapter Development Chair*

**Michele Lamarre**  
*Marketing Chair*

**Alisha Pierce**  
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**Jarrard "Rod" Powell**  
*At Large*

**Liz Walker**  
*Nominations & Elections Chair*

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**Aimee D. Griffin, Esq.**

## National Office Staff



**Omari Aarons-Martin, MDiv**  
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**Jephtha J. Snow, Esq.**  
*Chief Operating Officer*

**Ashley White, MBA**  
*Chief of Staff to the CEO*



**D'Jenique Inge**  
*Director, Marketing & Brand Engagement*

**Akili Smith**  
*Leadership Program Manager*

**Melanie Rogers**  
*National Program Coordinator*



**Precious Norman Walton, CPCU**  
*Agent Program Manager*

**Dawn Jackson**  
*Chapter Growth Project Manager*

**D'Juan Hopewell**  
*Social Impact Comms Manager*



**Kristin Roda**  
*Brand Project Manager*

**Destiny Allen**  
*Executive Assistant to the CEO*

### Credits

Editorial Direction & Lead Author: Omari Aarons-Martin  
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Principal Photography: Steven Easley, Donald Lebeauf



# 2025 Partners

NAAIA is proud to collaborate with the leading organizations in and adjacent to the insurance industry who share our mission and commitment.

## Level I - \$50,000+

## Level II - \$35,000+

## Level III - \$25,000+

## Level IV - \$15,000+

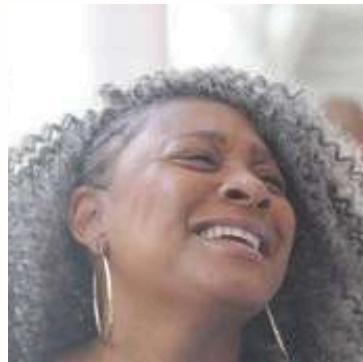
## Level V - \$10,000+

## Level VI - \$5,000+

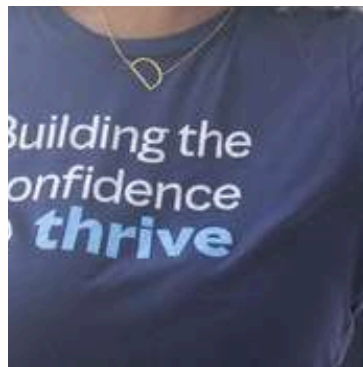
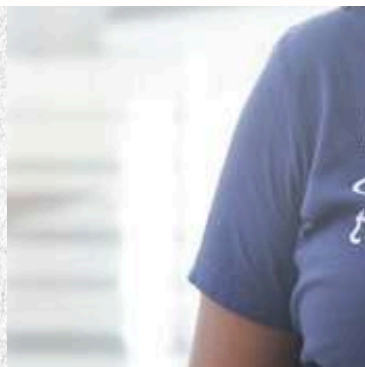




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