

# What's Your NIL Gameplan?

## Guide for Advisory Teams

The NCAA's Name, Image, and Likeness (NIL) rule has transformed the game—allowing student-athletes to earn compensation through endorsements, merchandise, appearances, and revenue-sharing opportunities. As these young athletes begin navigating financial decisions earlier than ever, the need for financial guidance is growing.

As NIL evolves, so does your opportunity to make a lasting impact. This worksheet helps you assess and activate your NIL strategy—so you can build trusted relationships with a new generation of clients and grow a more resilient, values-aligned practice.

### Step 1: Understand the playing field

**What are the NIL rules in your state, and how might they impact financial guidance?**

#### → To dos:

- ☐ Research your state's specific NIL laws, all applicable university or college NIL rules, and NCAA rules/laws to help you better understand the NIL landscape.
- ☐ Identify a resource to help you stay informed (e.g., NIL Network, state university sites, etc.)
- ☐ Clarify nuances or planning implications:  
*Example:* My state requires student-athletes to disclose NIL deals to the school district—this may create a compliance hurdle or educational opportunity.

#### + Capture your thinking here:

### Step 2: Define your “why?” for NIL

**Why are you interested in serving NIL clients—and what is driving your focus?**

#### → Reflect on what it is about these student-athletes that resonates with you:

- ☐ Are you passionate about empowering young people?
- ☐ Do you see a need for education and accountability?
- ☐ Does this align with your long-term business vision?

#### + Map out your “why?” and practice articulating it so it sounds natural when delivering it to clients and their families.

### Step 3: Assess your unique value

What strengths do you bring to the NIL conversation?

#### → Check the boxes that apply:

- ☐ Financial literacy/Investment education
- ☐ Experience with business owners, entrepreneurs, and athletes
- ☐ Others:

- + Share stories/information pertaining to your athletic background, NIL experiences, and/or relevant networks.

### Step 4: Build trust with a young, first-time clientele

How will you earn trust from student-athletes and their families?

#### → To dos:

- ☐ Develop a simplified discovery process
- ☐ Include parents/guardians in planning conversations
- ☐ Partner with coaches or school programs to provide value
- ☐ Research the athlete and create a personalized proposal
- ☐ Introduce financial concepts using examples/analogies to make it easier for student-athletes to understand
- ☐ Give financial literacy/NIL seminars
- ☐ Share NIL resources on your website and through social media
- ☐ Gain NIL accreditation

- + What would make a student-athlete or parent say:

*"I trust this advisor to guide my financial decisions?"*

### Step 5: Plan for accountability

What will keep you aligned with your NIL strategy?

#### → To dos:

- ☐ Create and practice your NIL value proposition and develop a referral story
- ☐ Set quarterly review goals
- ☐ Track outcomes and client wins
- ☐ Continue with NIL-specific education
- ☐ Reevaluate your strategy every 90 days
- ☐ Monitor the NIL landscape monthly to remain up-to-date on changes in laws/rules

- + Accountability tactics I plan on using:

## Your NIL gameplan in action

Map your strategy by writing out your vision, goals, and top-priority tasks for the next 90 days.

### VISION

### GOALS

### TOP TASKS (categories referenced are suggestions)

e.g., Define your **client outreach** strategy:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

e.g., Create a **financial literacy** tool kit (*list types of investor education resources*):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

e.g., Establish a **partnership/networking** list (*highlight professionals you can introduce to the client, such as tax and/or legal specialists*):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

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