

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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