

2018

NAPFA CONFERENCE SERIES

EXHIBITING OPPORTUNITIES AT THE
INDUSTRY'S TOP EVENTS FOR THE
FEE-ONLY/RIA COMMUNITY



YOUR OPPORTUNITY TO CONNECT AND GROW
WITH FEE-ONLY ADVISORS

BE SEEN.
BE HEARD.
BE THERE.

Not only is the industry heading in the Fee-Only direction, but hundreds of thousands of new American investors look to NAPFA to find qualified advice from Fee-Only advisors every year. Their needs involve virtually every facet of our industry, including: financial planning, investment management, retirement planning, education funding, insurance and risk management, estate planning, and much more. To meet these growing needs, members of NAPFA are constantly seeking out new services and products to help them continue building and growing their successful practices.

NAPFA's conferences provide a unique opportunity to interact with the top Fee-Only financial advisors in the industry. NAPFA conferences are considered to be among the most effective in the industry by delivering high-level educational content in an intimate setting. The structure of the events allows for greater exhibitor visibility and participation which, in turn, maximizes face-to-face and networking opportunities.

If you have any questions about exhibiting at one of the upcoming NAPFA conferences, please feel free to contact Ric Haines at (732) 920-4236 or ric.haines@erhassoc.com.

Sincerely,
Geoffrey Brown, CAE
CEO, NAPFA

INSIDE THE NUMBERS

Exhibiting at NAPFA conferences puts service and product providers squarely in front of the right people. More than 69.9% of NAPFA members are partners, principals, or owners of their respective firms (key decision makers).

NAPFA member firms continue to grow at an unprecedented rate (24.3% over the past three years), managing more assets for clients than ever before. With this growth comes increased demand for your products and services.

Consider these numbers >>>

475 Number of qualified RIAs projected to attend each 2018 NAPFA Conference

\$150+ Estimated Assets Under Management (in millions)

18.5 Estimated years of experience per member

153 Estimated number of intermediate to high-net worth clients served per member

93% Percentage of NAPFA-Registered Financial Advisors who are also Certified Financial Planners (CFP®)

1.1MILLION Number of consumers who visited the NAPFA Find An Advisor search tool in 2017

NAPFA Conference attendees are interested in, recommend to their clients, and personally use:

- Mutual Funds
- Individual Equities
- Bonds and other fixed income vehicles
- ETFs and ETNs
- Alternative Investments, including real estate, commodities and futures, currency exchange, etc.
- Insurance and Risk Management products and Services, including LTC, E&O, survivorship, all types of life insurance, etc.
- Trust and Custody Services
- Structured Products
- REITs
- 529 Plans / College Savings Plans and Services
- Charitable Giving
- Retirement Services
- Reverse Mortgage Strategies
- Qualified Plans
- Technology Products and Services
- Administrative, Coaching and Consulting Services
- Family Office Services
- And much more

"The time I spend with exhibitors is the single best way for me to come across new ideas to help service our clients even better."

-Jeff Daniher
Ritter Daniher Financial Advisory

EXHIBITING AT NAPFA CONFERENCES

RATES AND PACKAGES

NAPFA RESOURCE PARTNER

Take advantage of a unique opportunity to know our members and become a Resource Partner. Member firms are thriving, membership is growing, and NAPFA-Registered Financial Advisors are looking for new and better products and services to bring to their clients.

Resource Partner status is noticed and appreciated by the NAPFA membership. Existing Resource Partners report a distinct increase in the volume and quality of their business in the RIA Channel as a result of this relationship.

Resource Partners tell us they have “experienced better response and more interest in their products and services including a significant increase in the presentation and speaking invitations at NAPFA related events.”

Benefits include:


- 10% discount on NAPFA conference exhibiting packages
- Preferential booth at NAPFA conferences
- Ability to share research, white papers, articles or reports with membership
- Significant discounts on *The NAPFA Advisor Magazine* and Web Site advertising
- Three promotional e-mail blasts per year (from NAPFA server to current membership)
- Expanded presence on NAPFA Web Site
- Listed as sponsor on member e-newsletter (*What's New @ NAPFA*)
- A full listing in the printed *Annual NAPFA Resource Partner Directory*
- And much more!

If you are interested in becoming a Resource Partner, please contact Ric Haines at (732) 920-4236.

Exhibiting at NAPFA conferences is cost-effective and includes multiple opportunities to increase the awareness of your company, products and/or services before, during and after the event.

NAPFA SPRING

— 2018 NATIONAL CONFERENCE —

Phoenix 

May 16-19, 2018 - Sheraton Grand at Wild Horse Pass

NAPFA FALL

— 2018 NATIONAL CONFERENCE —

Philadelphia 

Oct. 15-18, 2018 - Sheraton Philadelphia Downtown Hotel

STANDARD FEE: \$8100

RESOURCE PARTNER FEE: \$7290

Exhibitor package includes:

- A standard size booth (8' x 10')
- Attendee mailing lists for use before and after the event
- Complete signage and promotion at the respective conference
- Listing on NAPFA Web Site (including company description and contact information)
- Magazine conference promotions
- Listing in the Conference Mobile App (including company description and contact information)
- Two Representatives

For additional information and package discounts, contact Ric Haines at (732) 920-4236 or ric.haines@erhassoc.com.

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UPCOMING NAPFA CONFERENCES

SPRING NATIONAL
MAY 16 - 19, 2018
SHERATON GRAND AT WILD
HORSE PASS, PHOENIX, AZ

FALL NATIONAL
OCTOBER 15 - 18, 2018
SHERATON DOWNTOWN
PHILADELPHIA, PA



"The interaction with exhibitors at NAPFA conferences is an invaluable part of my due diligence process."

- Tom Orecchio
Modera Wealth Management

"Visiting with the exhibitors is always on my 'must do' list at every NAPFA Conference."

- Cheryl Holland
Abacus Planning Group

WE'LL SEE YOU THERE!