

Editorial Contribution Guidelines

NAPFA Advisor Magazine

The NAPFA Advisor magazine is published each month by the National Association of Personal Financial Advisors. It has a circulation including NAPFA members and other Fee-Only planners based in North America.

The editorial mission of the Advisor is to inform Fee-Only, fiduciary advisors about how to operate their businesses more efficiently and effectively and how to improve the acquisition, retention, and satisfaction of clients.

Articles cover broad topics, such as investments, portfolio construction and allocation, insurance, retirement planning, regulatory and compliance issues, estate and tax planning, etc. The magazine also includes extensive tips for practice management, profiles of member firms, association news, conference previews and wrap-ups, and information about new technologies.

Contributions from individuals and firms serving Fee-Only financial advisors are welcome. All submissions are reviewed by the Advisor's editorial staff for objectivity, timeliness, relevance, and depth.

Here are some requirements and tips for editorial contributions.

Length, Format, Deadline

- Articles range from 800 to 2,400 words. An 800-word article fills one page in the *Advisor* and should be narrowly focused on a specific topic. Longer articles should range from 1,500 to 2,400 words and can address a concept in greater detail. Space is limited in the publication, and NAPFA strongly urges contributors to respect our length requirements.
- Longer articles can include tables, charts, and graphs. Our readers consistently tell us that they find these to be valuable if they support key points made in the text.
- All articles should be submitted electronically in Word format (ask Susan for a template with guidelines):
 - Email Susan Weiner, CFA, the *Advisor's* editor, at editor@napfa.org.
 - In the subject line, include the words CONTRIBUTED ARTICLE.
 - You can call Susan at 617-969-4509 to inform her that an article has been sent or for clarification about article guidelines.
- Authors should include short biographies (20-40 words), which will be printed at the end of the articles. These should include contact information. The *Advisor* does not publish author photos.

- Our deadline for articles assigned by the editor is the first business day of the month that is two months before the cover date. In other words, the March issue deadline will be January 2. If you anticipate that you will miss your deadline, contact the editor as soon as possible. Have an article idea? Don't wait until the last minute to propose it. Issues start to take shape as much as four months before the cover date.
- NAPFA publishes an editorial calendar each year, and every effort is made to coordinate contributions to match the editorial focus of each issue. If you have not received an editorial calendar, please see the bottom of this document.

Editorial Policies

- **Please remember that the NAPFA Advisor is written *exclusively* for Fee-Only advisors.** NAPFA adheres to a strict definition of Fee-Only: No NAPFA member may take commissions in any form, including soft dollars. So, articles about products with a sales load or trailing commissions are probably inappropriate for the *NAPFA Advisor* magazine and will not likely be published.
- ***NAPFA Advisor* subscribers are sophisticated, experienced financial professionals.** All NAPFA members have a minimum of three years of experience and are required to have their CFP®. Many of our subscribers have at least a decade of experience and multiple professional designations. So, please write with a proper level of sophistication for your audience. You are not writing for the general public.
- **Articles that define a specific problem and then provide possible solutions are very popular.** It is much better to address a "smaller" topic with more complete information than it is to give very general information about a broad topic.
 - Example:** If you're writing about alternative investments, pick a very specific investment strategy and describe the pros and cons. Explain how the strategy can be executed and what can interfere with the execution. Do not submit a general article that merely states, "Many advisors are now adding alternative investments to portfolios."
- **Your suggested solution could involve the product or service that you represent.** *NAPFA Advisor* subscribers understand that one reason that you are writing is to interest them in your product or service. However, you should always consider the merits of your product/service in the context of other options that also are available in the marketplace. Do not submit an article that is derived from your corporate marketing materials.
- **The *NAPFA Advisor's* editorial staff reserves the right to make changes to the submitted text.** If these changes potentially affect the content of your article, it will be returned to the author for review and further changes. Sometimes, this process goes

back and forth a few times. An article with changes that we view as substantive will not be published without the author's approval.

Copyright & Reprints

- You grant us first North American serial rights (the right to be the first to publish your material in North America) and the exclusive right to the article for 12 months from the publication date. After one year, you regain all rights in the work but this grant back is non-exclusive; NAPFA will continue to be permitted to publish the work, including online
- NAPFA may, at its discretion, make reprints available for marketing purposes (on high quality paper and at a reasonable price). Please contact Eric Haines, Director of Magazine Operations, at 732-920-4236 or ric.haines@erhassoc.com for more information.

Editorial Calendar

Magazine cover date	Theme	Due date
Jan. 2018	Succession planning/practice management	Nov. 1, 2017
Feb.	Marketing/communications	Dec. 1
March	Estate planning	Jan. 2, 2018
April	Investing	Feb. 1
May	Insurance	March 1
June	Budgeting/marketing	April 2
July	Technology	May 1
August	Financial planning/marketing	June 1
Sept.	Regulatory/legislative issues	July 2
Oct.	Ethics/marketing	August 1
Nov.	Retirement planning/taxes	Sept. 3
Dec.	Trends	Oct. 1

* The editorial focus is optional. The *Advisor* considers articles on other topics.

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