

Editorial 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 700 to 2,000 words. A 700-word article fills one page in the *Advisor* and should be narrowly focused on a specific topic. Longer articles 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. The best format for these exhibits (and only for exhibits, not for the main body of the article) is a hi-resolution JPG, PDF, EPS, or TIFF file that looks exactly how the author wants it to be presented. Image files should be at least 300 KB to reproduce well. Images saved from the web are often not of high enough resolution.
- 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 ask 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 three months before the cover date. In other words, the May issue deadline will be February 1. 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 six 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 aren't likely to 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 at 732-920-4236 or ric.haines@erhassoc.com for more information.

Editorial Calendar

Month	Editorial Focus (optional*)	Due Date for Assigned Stories
January	Succession planning/practice management	Oct. 1, 2021
February	Estate planning	Nov. 1
March	Budgeting/marketing	Dec. 1
April	Diversity, equity, & inclusion	Jan. 3, 2022
May	Insurance	Feb. 1
June	Investing	March 1
July	Financial planning/marketing	April 1
August	Technology	May 2
September	Regulatory/legislative issues	June 1
October	Ethics/marketing	July 1
November	Retirement planning/taxes	Aug. 1
December	Trends	Sept. 1

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

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