



NAPFA Advisor Magazine

Editorial Guidelines

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 generally range from 700 to 1,200 words. A 700-word article should focus narrowly 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.
- Include tables, charts, and graphs when possible and relevant. 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 high-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 of insufficient resolution and size.
- All articles should be submitted electronically in Word format (ask the editor 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 run 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 15th day of the month that is three months before the cover date (see the editorial calendar on page 4 for specific deadlines). In other words, the May issue deadline will be Feb. 15. If you anticipate that you will miss your deadline, contact the editor as soon as possible. Have an article idea? 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 not relevant 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® credential. 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 derived from your corporate marketing materials.
- **You may use hyperlinks in your articles** to link to resources and sources of your data. If you link to an article or book, you should identify it by name and author in the body of the article or provide a footnote to help readers identify the source if the link becomes broken. Here's a sample citation:

John Eing, "[Having the money conversation with your kids](#)," *NAPFA Advisor* (April 2022).

Links to your own firm's website should appear only in your biography unless the links are nonpromotional and their content is integral to the article. Generally, we suggest no more than six links per 1,000 words of text.
- **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.
- NAPFA welcomes submissions to the *NAPFA Advisor* magazine. Financial compensation is not provided for writing articles. By contributing to the magazine, you are sharing your knowledge and expertise with NAPFA members and are contributing to the advancement of the Fee-Only profession. Additionally, writing for *NAPFA Advisor* magazine offers opportunities to connect with NAPFA members; NAPFA's membership of 4,600+ individuals receive *NAPFA Advisor* magazine monthly in digital form.

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 encourages you to share your *Advisor* articles from its mobile-friendly website via social media. Here are the tags, sorted by social channel, that NAPFA requests you use to help the association get more engagement with its posts, hashtags, and pages:
 - Twitter: @NAPFA and #NAPFAAdvisor
 - Facebook: @National Association of Personal Financial Advisors (NAPFA) and #NAPFA
 - LinkedIn: @National Association of Personal Financial Advisors and #NAPFA

Policy on Using Generative Artificial Intelligence (AI) in Articles

To protect NAPFA and its writers against allegations of plagiarism and copyright infringement, we have a policy on the use of generative artificial intelligence (AI) in preparing articles.

- The writer agrees that all of their work is originally produced and not the product of any AI program, bot, or application.
- Generative AI (such as ChatGPT) may not be used to write stories submitted to the NAPFA Advisor unless the generative AI tool's use is disclosed and the point of the text is to discuss the use of generative AI.
- Generative AI may not be used to create images for use in stories submitted to the NAPFA Advisor.
- Any use of generative AI must be disclosed.
- Any research done using AI must be verified in a source not generated using AI.

2024 Editorial Calendar

Month	Editorial Focus (optional*)	Due Date for Assigned Stories
January	Succession planning/practice management	October 16, 2023
February	Estate planning	November 15, 2023
March	Budgeting/marketing	December 15, 2023
April	Diversity, equity, and inclusion	January 15, 2024
May	Insurance	February 15, 2024
June	Investing	March 15, 2024
July	Financial planning/marketing	April 15, 2024
August	Technology	May 15, 2024
September	Regulatory/legislative issues	June 17, 2024
October	Ethics/marketing	July 15, 2024
November	Retirement planning/taxes	August 15, 2024
December	Trends	September 16, 2024

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

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