



2023 Partnership Guide

Expand your reach – connect with
more than 4,500 NAPFA members

ABOUT NAPFA

NAPFA serves as the country's leading professional association of Fee-Only financial advisors. Since 1983, the association has represented and supported a growing community of highly trained practitioners.

More than 4,500 NAPFA members currently serve as a beacon for independent, objective financial advice for individuals and families. They strive to be the champion of financial services delivered in the public interest, and to be the standard bearer for the financial planning profession.



A diverse set of educational learning opportunities are available for NAPFA members to advance their dedication to Fee-Only financial planning. In addition, NAPFA offers several ways for members to connect with one another, including getting involved in volunteering, joining a Local Group, and attending a Conversation Circle. These compelling opportunities help NAPFA members not only learn from one another through peer-to-peer connection, but continue increasing the importance and value of Fee-Only financial planning.

NAPFA members are a known, well-respected, and dependable segment of the independent advisory landscape. They commonly tend to service clients with a high net worth.

NAPFA is available to help you expand your reach to NAPFA members and financial advisors within the profession.

60%

of members are key decision-makers such as partners, principals, or owners of their respective firms.

93%

of members are independent financial advisors affiliated with a registered investment advisor (RIA).

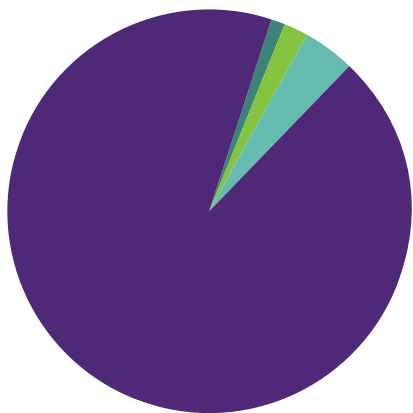
27B

Estimated purchasing power of NAPFA members.

42%

of NAPFA members have more than \$100 million in assets under management.

Membership Demographics



93% Financial advisory and planning professionals.

4% Student members

2% Academicians

1% Retired financial advisory and planning professionals



OPPORTUNITIES AVAILABLE

Resource Partner Program

NAPFA members are interested in products and services to offer to their clients. Being a **NAPFA Resource Partner** helps your company stand out from others. It entitles you to special acknowledgment and benefits from NAPFA.

Advertising

NAPFA has various advertising opportunities available, including space in *NAPFA Advisor* magazine, website advertisements, online retargeting advertisements, and more.

Sponsor & Exhibit

Greatly expand your brand reach by sponsoring a NAPFA related educational opportunity. Additionally, sponsor or exhibit at a NAPFA national conference or NAPFA's annual Large Firm Forum event. A variety of opportunities are available at various price points.

Resource Partner Program

\$4,000/year

Resource Partner benefits include:

- 10% discount on exhibitor fees for most NAPFA conferences
- Preferential space in the Solutions Exchange
- Annual use of NAPFA U.S. mail list
- Ability to share research, white papers, articles or reports with membership
- Significant discounts on *NAPFA Advisor* and website advertising
- Emails – NAPFA does not distribute member email addresses. However, Resource Partners are entitled to have NAPFA send two emails to members per calendar year. *Any email that contains information which markets an activity that competes with a NAPFA event will not be eligible for this privilege.*

NAPFA is fortunate to have extremely loyal members. Existing Resource Partners have experienced increased activity because members show their appreciation for Resource Partner support of the organization.

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



"We believe that being a NAPFA Resource Partner gives our firm credibility among the membership and provides access we might not otherwise have to member firms."

Gregory C. Freeman, JD., CLU, ChFC, RICP, CLTC
AdvisorServe

Advertising

NAPFA offers individual opportunities and bundled packages to fit your marketing needs.

Advertising packages offer repeat advertising opportunities throughout the year while saving on your marketing costs.



NAPFA Advisor

NAPFA Advisor delivers timely, accurate and actionable information for NAPFA members nationwide each month. Don't miss your chance to reach key decision-makers.

NAPFA Advisor is:

- Delivered directly to the inbox of nearly **4,000** decision-makers on a regular basis
- Frequently forwarded to others for additional exposure
- Cross-promoted in other NAPFA publications and communications pieces
- Archived and accessible for unlimited online viewing

View Options

www.NAPFA.org

Reach member and nonmember visitors and reinforce your marketing message.

Features of NAPFA website advertising:

- Cross-promoted in other NAPFA publications and communication pieces
- Directs visitors to the landing page of your choice to expedite purchases
- Year-round visibility reinforces brand recognition
- Allows dynamic, time-sensitive promotion

View Options



Advertising, ctd.



Audience Retargeting

Continue to build your brand beyond the NAPFA website through audience extension which displays your ad to users who have already visited NAPFA's site while they are visiting other sites across the web.

Audience extension (also known as site retargeting) is a highly effective method of converting site visitors into purchasers, increasing your ROI and eliminating wasted impressions.


98% of consumers will leave a site without converting. Here is your chance to re-engage them with a completely new level of performance and insight.

[View Options](#)

If you are interested in advertising with NAPFA, please contact:

Krys Whildin
krys.whildin@naylor.com
352-333-3406

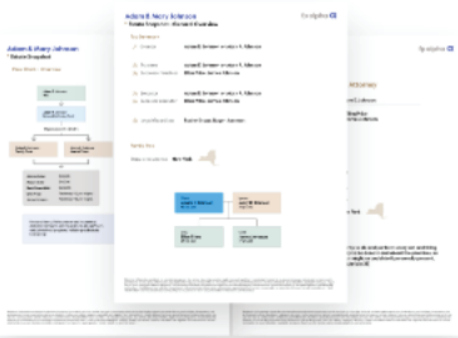
View the full [NAPFA Advertising Media Guide](#)

fp alpha 

The Estate Snapshot

A recent [study](#) shows that 91% of clients want estate planning advice from their advisors but fewer than 25% are actually receiving it. FP Alpha can assist advisors in providing this service at **SCALE!**

Schedule A Demo



The Estate Snapshot provides you with the ability to:

- Use AI technology to read documents such as wills, trusts, POA's, life insurance, medical directives, and amendments

NAPFA Membership Email

\$1,600

Reach members directly through email, sent from NAPFA on behalf of your company. Share new products and services with a fully custom email and choice of subject line.

Any email that contains information which markets an activity that competes with a NAPFA event will not be eligible for this privilege.

If you are interested in sending an email to NAPFA members, please contact Ric Haines at (732) 920-4236.

Sponsorships

Educational Sponsorships

\$2,500

Partner Solutions Webinar Series

Today's financial planning professionals face an ever increasing and diverse range of business challenges. From anticipating marketplace shifts to managing client expectations, finding solutions to tough questions isn't always easy.



As a sponsor of a Partner Solutions webinar, your company can help offer unique perspectives and business solutions for diverse challenges NAPFA members face.

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



Educational Partnership

NAPFA has partnered with various organizations to provide members with access to a variety of education and training.

Does your company have valuable training and education that could benefit NAPFA members? Consider becoming a **NAPFA Education Partner**. As a partner, you will:

- Be listed on the [NAPFA website](#)
- Have an individual page listing on the [NAPFA Learning Center](#)
- Receive acknowledgment regularly in NAPFA's monthly educational opportunities emails
- Be featured regularly on NAPFA's social media channels

If you are interested in becoming a NAPFA Education Partner, please contact Ric Haines at (732) 920-4236. Pricing is based on the Scope of Partnership.

Upcoming NAPFA National Conferences



NAPFA Spring 2023 National Conference

May 10 - 13, 2023

Marriott Marquis San Diego Marina
San Diego, CA



NAPFA Fall 2023 National Conference

October 18 - 21, 2023

Omni Louisville Hotel
Louisville, KY



NAPFA Spring 2024 National Conference

May 8 - 11, 2024

Omni Fort Worth Hotel
Fort Worth, TX



NAPFA Fall 2024 National Conference

October 30 - November 2, 2024

Omni Nashville Hotel
Nashville, TN

NAPFA National Conference Sponsor & Exhibitor Opportunities

NAPFA hosts two national conferences each year. National conferences are held each spring and fall throughout the U.S. and attract more than 60 exhibitors and 400 practitioners.

In addition to outstanding educational sessions, there is always a well-attended Solutions Exchange where you can offer new business solutions to attendees.



Opportunities Available

Premier Exhibitor Package

\$9,900

Two company representatives (with full conference access)

- 8x10 (ft), piped and draped booth space in the “Reserved/Premium” section of the Solutions Exchange
- Attendance list sent three weeks prior to the live conference start date and one week after the conference. List includes the name and company name for all registered attendees and mailing addresses and/or email addresses for those who opt-in to sharing this information
- Complete, on location signage, and promotion as “Premier Exhibitor”
- Listing on NAPFA Website as “Premier Exhibitor”. Listing includes company name, logo, description (200 word maximum), and link to exhibitor’s website
- Listing in the respective conference mobile app as “Premier Exhibitor”. Listing includes company name, logo, description (200 word maximum), and link to exhibitor’s website
- One “push notification” from the mobile app during the respective conference
- One promotional video (one minute max) included on website and in event marketing
- Thank you tweet and mention from official NAPFA Twitter account

Standard Exhibitor Package

\$8,200

- Two company representatives (with full conference access)
- 8x10 (ft), piped and draped booth space in the Solutions Exchange
- Attendance list sent three weeks prior to the live conference start date and one week after the conference. List includes the name and company name for all registered attendees and mailing addresses and/or email addresses for those who opt-in to sharing this information
- Complete, on location signage, and promotion
- Listing on NAPFA website. Listing includes company name, logo, description (100 word maximum), and link to exhibitor’s website
- Listing in the respective conference mobile app. Listing includes company name, logo, description (100 word maximum), and link to exhibitor’s website

Sponsorship Opportunities for Exhibitors

As an exhibitor, you have exclusive access to the following add-on sponsorship opportunities. Standalone sponsorship opportunities are also available. Contact [Ric Haines](#) for additional information.



Breakout Session Sponsorship

\$8,000

Be the exclusive sponsor of a national conference breakout session!

- Build relationships with attendees while delivering educational content on a topic of choice at one of the concurrent breakout sessions
- Limit of seven (7) sponsorships available per event
- Sponsorship promoted on website and mobile app

"The benefit of being a breakout sponsor allows me to get directly in front of advisors, not only those who already have a basic knowledge of reverse mortgages, but often those who are in the early stages of the learning process."

Jerry Auippa, CRMP
Senior Account Executive, Longbridge Financial



Closing Party Sponsorship

\$5,000

Exclusively sponsor the Closing Party at a NAPFA National Conference as the exclusive reception sponsor.

Benefits include:

- Exclusively co-sponsor the Closing Party with NAPFA
- Acknowledgment of and thank you for sponsorship will appear on the conference web page, in the respective conference mobile apps, on conference signage, and by the NAPFA member Closing Party host
- Introduction of co-sponsor representative by NAPFA host at the start of the reception
- 5-7 minutes available for sponsor promotion immediately following sponsor representative introduction
- Attendance list sent three weeks prior to the live conference start date and one week after the conference. List includes the name and company name for all registered attendees and mailing addresses and/or email addresses for those who opt-in to sharing this information
- Space will be available for promotional materials (provided by the sponsor) at the entrance to the reception and in the Solutions Exchange brochure racks
- One (1) sponsor representative registration (with full conference access)
- Thank you tweet and mention from official NAPFA Twitter account

Cocktail Reception Sponsorship

\$3,500

Be the exclusive sponsor of NAPFA's cocktail reception, taking place in the Solutions Exchange.

Benefits include:

- Full acknowledgment of and thank you to the sponsor will be:
 - On the NAPFA conference web page
 - In the conference mobile app
 - On event signage
 - By the NAPFA member cocktail reception host
- The NAPFA cocktail reception host will introduce the sponsor representative at the beginning of the reception
- 2-3 minutes will be available for sponsor promotion during the Keynote session
- Space will be available for promotional materials (provided by the sponsor) at the entrance to the reception and in the Solutions Exchange brochure racks
- Thank you tweet and mention from official NAPFA Twitter account



First Time Attendee Reception Sponsorship

\$3,500

Kick off the FirstTime Attendee Reception at a NAPFA National Conference as the exclusive reception sponsor.

Benefits include:

- Acknowledgment of and thank you for sponsorship will appear on the conference web page, in the respective conference mobile apps, and on conference signage
- 3-5 minute introduction of co-sponsor representative by NAPFA host at the start of the reception
- Immediately following the above introduction, the co-sponsor representative will be provided time for a brief company promotion
- Thank you tweet and mention from official NAPFA Twitter account

Women Advisors Reception Sponsorship

\$3,500

Kick off the Women Advisors Reception at a NAPFA National Conference as the exclusive reception sponsor.

Benefits include:

- Acknowledgment of and thank you for sponsorship will appear on the conference web page, in the respective conference mobile apps, and on conference signage
- 3-5 minute introduction of co-sponsor representative by NAPFA host at the start of the reception
- Immediately following the above introduction, the co-sponsor representative will be provided time for a brief company promotion
- Thank you tweet and mention from official NAPFA Twitter account

Mobile App Sponsor

\$5,200

Exclusively sponsor the conference mobile app, used by attendees, exhibitors, and sponsors throughout the conference.

Benefits include:

- Exclusive sponsorship of the conference mobile app
- Full acknowledgment of and thank you to the sponsor will be:
 - On the NAPFA conference web page
 - In the conference mobile app
 - In emails sent to conference attendees
 - Mentioned during the general sessions
- Attendance list sent three weeks prior to the live conference start date and one week after the conference. List includes the name and company name for all registered attendees and mailing addresses and/or email addresses for those who opt-in to sharing this information
- Two (2) push notifications in the mobile app during the conference
- One (1) promotional ad or banner in the mobile app
- Space available in the mobile app for sponsor promotion and contact information
- Additional limited space available for sponsor promotional materials in brochure display racks located near the main Solutions Exchange entrance
- One (1) sponsor representative registration (with full conference access)
- Thank you tweet and mention from official NAPFA Twitter account

Keynote Speaker Introduction

\$2,200

Introduce one (1) of three (3) keynote speakers at the 2022 NAPFA Fall Conference and the 2023 NAPFA Spring Conference (specific keynote speaker to be agreed upon by sponsor and NAPFA).

Benefits include:

- Acknowledgment of and thank you for sponsorship will appear on the NAPFA spring and fall conference web pages, in the respective conference mobile apps, and by the NAPFA general session host at each conference.
- Attendance list sent three weeks prior to the live conference start date and one week after the conference. List includes the name and company name for all registered attendees and mailing addresses and/or email addresses for those who opt-in to sharing this information
- Full and appropriate biographical information for introduction.
- A welcome and introduction from the NAPFA general session host as the presenter of the keynote speaker introduction.
- 3-5 minutes prior to the keynote speaker introduction for a short sponsor promotion.
- Space will be available for promotional materials (provided by the sponsor) at the entrance to the reception and in the Solutions Exchange brochure racks
- Thank you tweet and mention from official NAPFA Twitter account

Event WiFi

\$5,500

Benefits include:

- Recognition on printed WiFi card with sponsor logo provided to each attendee
- Recognition in final pre-conference email to attendees
- Recognition on conference transition slides
- Thank you tweet and mention from official NAPFA Twitter account

Refreshment Breaks

\$5,000 - \$7,500

Benefits include:

- Logo displayed prominently on signage near break area
- Recognition in final pre-conference email to attendees
- Recognition on conference transition slides
- Thank you tweet and mention from official NAPFA Twitter account



Attendee Hotel Room Key

\$3,500 + cost

Benefits include:

- Logo displayed prominently on room key
- Recognition in final pre-conference email to attendees
- Recognition on conference transition slides
- Thank you tweet and mention from official NAPFA Twitter account

Attendee Badge Holder or Lanyard

\$2,800

Benefits include:

- Logo displayed prominently on badge holder
- Recognition in final pre-conference email to attendees
- Recognition on conference transition slides
- Thank you tweet and mention from official NAPFA Twitter account



If you are interested in sponsoring or exhibiting at a national conference, please contact Ric Haines at (732) 920-4236.



NAPFA is here to help.

Engage with the NAPFA community



NAPFA Contacts

If you are interested in any of the following opportunities, please contact the appropriate representative.

Krys Whildin
(352) 333-3406
krys.whildin@naylor.com

Ric Haines
(732) 920-4236
ric.haines@erhassoc.com

Online Advertising

Resource Partner Program
NAPFA Membership Email
Sponsorships
NAPFA National Conference
Sponsor & Exhibitor Opportunities
NAPFA Large Firm Forum Sponsor Opportunities

If you have general questions, please contact info@napfa.org.