



2026 Partnership Guide

Expand your reach:
Gain access to thousands of Fee-Only Financial Advisors

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 is available for NAPFA members to advance their dedication to Fee-Only financial planning. In addition, NAPFA offers several ways for members to connect, 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 also 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.

75%

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).

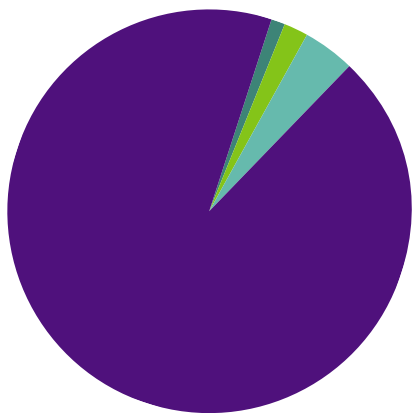
>\$27B

Estimated purchasing power of NAPFA members.

>10%

of NAPFA members attend at least one national conference each year.

Membership Demographics



93% Financial advisory and planning professionals.

4% Student members

2% Academicians

1% Retired financial advisory and planning professionals



OPPORTUNITIES AVAILABLE

National Partner Program

NAPFA members are decision-makers and are always seeking new solutions. Being a **NAPFA National Partner** provides exclusive access to NAPFA members. It entitles you to special acknowledgment and benefits from NAPFA throughout the year and at NAPFA events.

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, retargeting advertisements, podcasts, 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.

National Partner Program

Custom Pricing

NAPFA National Partners are provided with a customized partnership agreement that best fits their particular needs.

Resource Partner Program

\$4,500/year

Resource Partner benefits include:

- 10% discount on exhibitor fees for most NAPFA conferences
- Preferential space in the Solutions Exchange
- 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 that 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.



"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 **4,500** 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

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



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 virtual advertising in the *NAPFA Advisor* magazine or on NAPFA.com, please contact:

Kira Krewson
(770) 810-6982
kkrewson@naylor.com

NAPFA
FUTURE FINANCIAL ADVISORS

THE UNIVERSITY OF ALABAMA ONLINE

Make a Good Financial Decision for Your Career

Helping people make good financial decisions starts with making good financial decisions for your education.

With the same affordable tuition, no loss of residency and no hidden fees, you can earn a premier bachelor's or master's degree in Family Financial Planning and Counseling through UACore.

Both programs are offered online and fulfill the educational requirements to sit for the CFP® exam and become a CFP® professional. And when you graduate, you'll be invited to cross the stage with more than 600 graduates — it's the same University of Alabama degree. It just costs less!

UACore is the CFP® Board Registered program and our AACSB® Registered Bachelor's program.

Get Started

Russ Todd
The University of Alabama Online
(800) 467-0227
online.ua.edu | online@ua.edu

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273 Kilgore Lane, Box 870985, Tuscaloosa, AL 35487

NAPFA
8700 N. State Street
Suite 1500
Chicago, IL 60631
Manage Your Preferences

NAPFA Membership Email

\$1,600

Reach NAPFA members directly with an email sent from NAPFA on behalf of your company. Share new products, services, or announcements with a fully customized message and subject line. Exhibitors provide the email content and design as an HTML file, keeping full control of the look and messaging.

Each email is scheduled by NAPFA on a mutually agreed-upon date to ensure optimal timing and member engagement. Multiple emails may be purchased.

Emails promoting activities that compete with NAPFA events or mission are not eligible for this opportunity.

Educational Sponsorships

Partner Solutions Webinar

\$2,500

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



As a sponsor of a Partner Solutions webinar, your company can provide valuable insights and business solutions for the diverse challenges NAPFA members face.



Educational Partnership Custom Pricing

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

2026 NAPFA NATIONAL CONFERENCES



NAPFA Large Firm Forum

February 2 - 3, 2026

The Royal Sonesta San Juan
San Juan, Puerto Rico



NAPFA Spring 2026 National Conference

May 6 - 9, 2026

Hilton Minneapolis
Minneapolis, MN



NAPFA Fall 2026 National Conference

October 14 - 17, 2026

Hyatt Regency
Atlanta, GA



NAPFA Spring & Fall 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 400 industry representatives, financial planners, and other practitioners.

In addition to the outstanding Solutions Exchange, exhibitors & sponsors are invited to attend the numerous networking events, education sessions, and receptions.



Opportunities Available

Signature Sponsor Suite Exhibitor Package

\$15,000

Four company representatives (with full conference access)

- 10x20 (ft), piped and draped booth space in a premium location of the Solutions Exchange
- Attendance list provided three weeks before and one week after the conference, including name, company, email, city, and state for attendees who opt in to share their information
- On location signage and promotion as a "Signature Sponsor"
- Listing on the conference website and conference mobile app as "Signature Sponsor", including company name, logo, description (200-word maximum), and link to exhibitor's website
- Two "push notifications" from the mobile app during the respective conference
- One promotional video (one minute max) included on website and in event marketing
- Acknowledgment with a "ThankYou" post on NAPFA's LinkedIn page

Premier Exhibitor Package

\$10,500

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 provided three weeks before and one week after the conference, including name, company, email, city, and state for attendees who opt in to share their information
- On location signage and promotion as "Premier Exhibitor"
- Listing on the conference website and 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
- Acknowledgment with a "ThankYou" post on NAPFA's LinkedIn page

Standard Exhibitor Package

\$8,500

Two company representatives (with full conference access)

- 8x10 (ft), piped and draped booth space in the Solutions Exchange
- Attendance list provided three weeks before and one week after the conference, including name, company, email, city, and state for attendees who opt in to share their information
- Listing on the conference website and conference mobile app. Listing includes company name, logo, description (100-word maximum), and link to exhibitor's website
- Recognition in event signage during the conference

Sponsorship Opportunities for Exhibitors

As an exhibitor, you have exclusive access to the following sponsorship opportunities.



Breakout Session Sponsorship

\$8,450

Be the exclusive sponsor of a national conference breakout session.

- Session is listed within the education agenda
- Build relationships with attendees while delivering educational content on a topic of choice at one of the concurrent breakout sessions
- Limited number of sponsorships available per event
- Sponsorship promoted on the conference 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

\$6,000 or \$14,000 Exclusive

Sponsor the Closing Party at a NAPFA National Conference.

Benefits include:

- Jointly or exclusively sponsor the Closing Party at a NAPFA National Conference
- Recognition on the conference webpage, mobile app, and event signage
- One (1) push notification via mobile app recognizing your sponsorship and linking to your call to action
- Attendance list provided three weeks before and one week after the conference, including name, company, email, city, and state for attendees who opt in to share their information
- Opportunity to feature a signature cocktail named and customized by the sponsor (cost billed separately)
- Space for promotional materials (provided by the sponsor) on tables at the Closing Party
- One (1) sponsor representative registration (with full conference access)
- Acknowledgment with a "Thank You" post on NAPFA's LinkedIn page

Cocktail Reception in Solutions Exchange Sponsorship

\$5,500

Sponsor an evening cocktail reception at NAPFA national conference.

Benefits include:

- Recognition on the conference webpage, mobile app, and event signage
- One (1) push notification via mobile app recognizing your sponsorship and linking to your call to action
- Attendance list provided three weeks before and one week after the conference, including name, company, email, city, and state for attendees who opt in to share their information
- Chance to showcase a signature cocktail, named and customized by the sponsor (separate cost)
- Sponsor-provided materials displayed on surfaces in or near the reception area
- One (1) sponsor representative registration (with full conference access)
- Acknowledgment with a “ThankYou” post on NAPFA’s LinkedIn page

Welcome Reception Sponsorship

\$4,500 or \$8,000 Exclusive

Kick off the NAPFA National Conference as the Welcome Reception sponsor.

Benefits include:

- Recognition on the conference webpage, mobile app, and event signage
- One (1) push notification via mobile app recognizing your sponsorship and linking to your call to action
- Access to the attendee list three weeks before and one week after the conference, including names, company details, and contact information (for those who opt in)
- Chance to showcase a signature cocktail, named and customized by the sponsor (separate cost)
- Sponsor-provided materials displayed on surfaces in or near the reception area
- One (1) sponsor representative registration (with full conference access)
- Acknowledgment with a “ThankYou” post on NAPFA’s LinkedIn page

Custom Sponsorship Opportunities

Call for Pricing

Looking for something distinctive? Let’s create it together.

NAPFA offers a limited number of customizable opportunities for organizations that want a tailored presence at a National Conference. These options allow you to design an experience or activation that aligns with your goals while enhancing the attendee experience.

Examples may include:

- Branded attendee touchpoints
- Unique on-site activations
- Specialized visibility or engagement opportunities



To explore a custom package that fits your objectives, contact us to start the conversation.

Mobile App Sponsor

\$5,500

Be the exclusive sponsor of the conference mobile app, the go-to resource for 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 NAPFA's conference web page
 - In the conference mobile app
 - In email communication sent to conference attendees
 - Mentioned during general sessions
- Attendance list provided three weeks before and one week after the conference, including name, company, email, city, and state for attendees who opt in to share their information
- Two (2) push notifications via mobile app recognizing your sponsorship and linking to your call to action
- One (1) promotional ad or banner in the mobile app
- Dedicated space available in the mobile app for sponsor promotion and contact information
- One (1) sponsor representative registration (with full conference access)
- Acknowledgment with a "ThankYou" post on NAPFA's LinkedIn page

Showcase Sponsorships

Call for Pricing

Sponsor a micro-learning experience in the Solutions Center at a national conference.

Details and pricing to be announced

Event WiFi

\$6,900

Benefits include:

- Recognition on printed WiFi signage
- Recognition in the final pre-conference email
- Customized password for WiFi access
- One (1) push notification via mobile app recognizing your sponsorship and linking to your call to action
- Recognition on conference transition slides
- Acknowledgment with a "ThankYou" post on NAPFA's LinkedIn page

Refreshment & Coffee Breaks

Call for Pricing

Benefits include:

- Logo displayed prominently on signage near the break area
- Sponsor acknowledgment in pre-conference email to attendees
- Recognition on conference transition slides
- Acknowledgment with a "ThankYou" post on NAPFA's LinkedIn page



Attendee Hotel Room Key

\$3,500 + cost

Benefits include:

- Logo displayed prominently on the room key
- Sponsor acknowledgment in pre-conference email to attendees
- Recognition on conference transition slides
- Acknowledgment with a “Thank You” post on NAPFA’s LinkedIn page

Attendee Lanyard

\$3,000

Benefits include:

- Logo displayed prominently on the lanyard or bag
- Recognition in the final pre-conference email
- Recognition on conference transition slides
- Acknowledgment with a “Thank You” post on NAPFA’s LinkedIn page



Networking Lounge Sponsorship

\$12,500

Enhance attendee engagement by sponsoring the Networking Lounge, the prime location for connecting with peers throughout the conference.

Sponsorship Benefits:

- Exclusive branding of the Networking Lounge, including signage and displays within the space
- Recognition on the NAPFA conference webpage, mobile app, and event signage
- Acknowledgment in pre-conference email communications to conference attendees
- Mention during general sessions
- Attendance list provided three weeks before and one week after the conference, including name, company, email, city, and state for attendees who opt in to share their information
- Space available in the lounge for sponsor-provided materials or giveaways
- Acknowledgment with thank-you post on NAPFA’s LinkedIn page



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



LARGE FIRM FORUM 2026



NAPFA Large Firm Forum Sponsor Opportunities

Large Firm Forum | February 2 - 3, 2025
The Royal Sonesta San Juan, Puerto Rico



Projected Attendees: A highly engaged and influential group of peers from approximately 25 to 45 NAPFA member firms is expected to attend. Participation is generally limited to firms with more than \$1 billion in assets under management and a select group of emerging firms nearing that level.

Program Focus: A curated program designed to foster meaningful dialogue and connections among leaders of large fiduciary firms, addressing the key issues and best practices most relevant to their continued growth and success.

Large Firm Forum Sponsor

\$7,600

Sponsorships are by "Invitation Only," with a maximum of twenty (20) available.

Benefits Include:

- One (1) company representative
- Individual sponsor "Meet & Greet Hospitality Location" (cocktail table and chairs in the main conference area)
- Pre- and post-event attendee lists for attendees who opt in to share their information
- Transition slideshow featuring company name and logo before, during, and after breaks
- Verbal acknowledgment by program leaders during the event
- Sponsor name, logo, and acknowledgment on the conference website



Premium Sponsorships

General Session Sponsor

\$10,000

Availability: Exclusive

Benefits Include:

- Two-minute remarks and the opportunity to introduce the general session speaker
- Verbal acknowledgment by the emcee before and after the keynote
- Logo featured on the event website, printed program, on-site signage, and keynote title slide
- Recognition in pre-event marketing and communications
- One full-conference registration
- Individual "Meet & Greet" hospitality location
- Inclusion in the post-event thank-you email to attendees



Network Reception Sponsor

\$7,500

Availability: Limited to 1 sponsor per reception

Benefits Include:

- Prominent signage at the reception entrance and bar areas
- Recognition on the event website, Forum program, and related communications
- Option to provide branded napkins, glassware, or small giveaways (subject to approval)
- One full-conference registration
- Inclusion in the post-event thank-you email to attendees

Dinner Sponsor

\$10,000

Availability: Limited to 1 sponsor per dinner

Benefits Include:

- Recognition as the host of one evening dinner
- Prominent signage at the dinner venue and in the printed program
- Recognition on the event website, printed program, and related communications
- Option to provide branded menus, table décor, or giveaways (subject to approval)
- One full-conference registration
- Reserved table for sponsor representatives
- Inclusion in the post-event thank-you email to attendees

Enhancement Opportunities

Email Blast

\$1,250

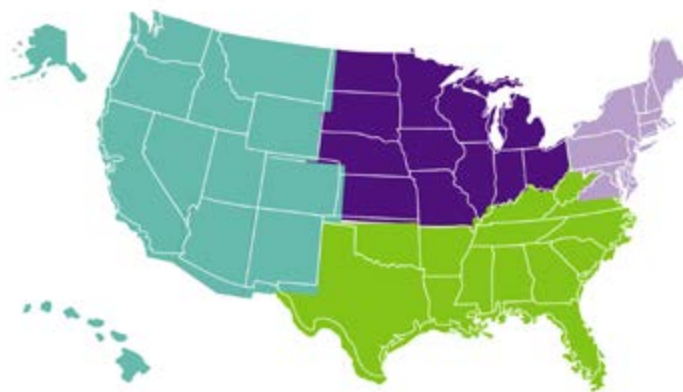
Availability: Limited opportunities available

A promotional email sent from NAPFA to all current NAPFA Large Firm members.

Guest Room Drop

Call for Pricing

Reach attendees where they start and end their day at the host hotel. All materials must be approved in advance. Pricing varies based on hotel room count and delivery logistics; a quote will be provided upon request. All room drops must be coordinated through NAPFA, and sponsors may not arrange direct deliveries with the hotel.



Region Symposiums Sponsor Opportunities

Platinum Level Sponsorship

\$3,250

Availability: One (1) per region

Benefits Include:

- Two (2) company representative registrations
- Verbal recognition by program leaders during the event, leading to a three-minute introduction (in addition to National Sponsor remarks)
- Logo and acknowledgment on the NAPFA regional symposium website
- Opportunity to provide printed materials at attendee check-in
- One (1) dedicated social media post before the event
- Recognition in a promotional email
- Logo and acknowledgment in the on-site transition slideshow
- Pre- and post-event attendee lists for attendees who opt in to share their information
- On-site signage featuring sponsor name, logo, and sponsorship level at all meal stations

Gold Level Sponsorship

\$2,750

Availability: Two (2) per region

Benefits Include:

- One (1) company representative registration
- Verbal recognition by program leaders during the event (company name, representative, and brief description)
- Logo and acknowledgment on the NAPFA regional symposium website
- Logo and acknowledgment in the on-site transition slideshow
- Recognition in a promotional email
- Pre- and post-event attendee lists for attendees who opt in to share their information
- On-site signage featuring sponsor name, logo, and sponsorship level at all drink stations

Silver Level Sponsorship

\$1,950

Availability: Four (4) per region

Benefits Include:

- One (1) company representative registration
- Verbal recognition by program leaders during the event
- Logo and acknowledgment on the NAPFA regional symposium website
- Logo and acknowledgment in the on-site transition slideshow
- Pre- and post-event attendee lists for attendees who opt in to share their information
- On-site signage featuring sponsor name, logo, and sponsorship level

Pricing per symposium and includes simulcast locations



NAPFA is here to help.
Engage with the NAPFA community

NAPFA Contacts

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

Kira Krewson

(770) 810-6982

kkrewson@naylor.com

Online Advertising

NAPFA Advisor Magazine

Ric Haines

(732) 920-4236

ric.haines@erhassoc.com

Resource Partner Program

Sponsored Membership Emails

Sponsored Webinars

National Conference Opportunities

Large Firm Forum Opportunities

Region Symposium Opportunities

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