



2025 Partnership Guide

Expand your reach – get 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 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.

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).

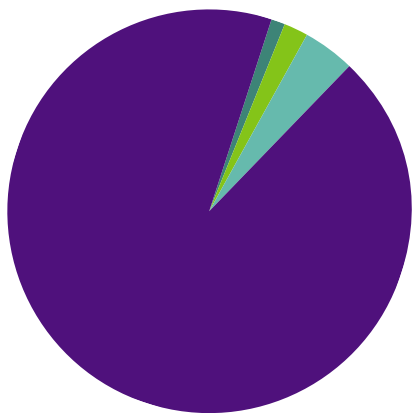
\$27B

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 looking to find 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
- 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.



"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 advertising with NAPFA, please contact:

Kira Krewson

(770) 810-6982

kkrewson@naylor.com

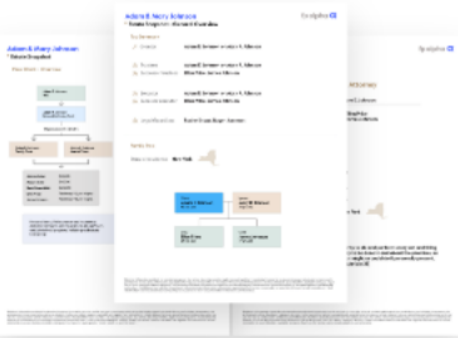
View the full [NAPFA Advertising Media Guide](#)

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.

Educational Sponsorships

Solution Partner 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 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

Upcoming NAPFA National Conferences



NAPFA Spring 2025 National Conference

May 7-10, 2025

Sheraton Phoenix Downtown

Phoenix, AZ



NAPFA Fall 2025 National Conference

September 3-6, 2025

Grand Hyatt Washington

Washington, DC



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 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

\$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 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
- On location signage, and promotion as "Signature Sponsor"
- Listing on NAPFA Website and conference mobile app as "Signature Sponsor". Listing includes 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
- One Showcase: hosting a micro-learning experience in the Solutions Center at a national conference
- Acknowledgment with a "Thank You" 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 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
- On location signage, and promotion as "Premier Exhibitor"
- Listing on NAPFA 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 "Thank You" 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 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
- Listing on NAPFA 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 with 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 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:

- Joint or exclusively sponsor the Closing Party with at a NAPFA National Conference.
- Recognition on the conference webpage, mobile app, and event signage.
- One (1) push notification sent out via mobile app thanking you as sponsor and directing people 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)
- 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

\$5,000

Sponsor evening cocktail reception at NAPFA national conference.

Benefits include:

- Recognition on the conference webpage, mobile app, and event signage.
- One (1) push notification sent out via mobile app thanking you as sponsor and directing people 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)
- Opportunity to feature a signature cocktail named and customized by the sponsor (cost billed separately)
- Space at entrance for promotional materials (provided by the sponsor) on tables at the reception
- One (1) sponsor representative registration (with full conference access)
- Acknowledgment with a “ThankYou” post on NAPFA’s LinkedIn page



First Time Attendee Reception Sponsorship

\$3,500

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

Benefits include:

- Recognition on the conference webpage, mobile app, and event signage.
- One (1) push notification sent out via mobile app thanking you as sponsor and directing people 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)
- Space for promotional materials (provided by the sponsor) on tables at the reception
- Introduction and thank you of sponsor representative by NAPFA host at the start of the reception
- Acknowledgment with a “ThankYou” post on NAPFA’s LinkedIn page

Welcoming Reception Sponsorship

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

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

Benefits include:

- Recognition on the conference webpage, mobile app, and event signage.
- One push notification sent out via mobile app thanking you as sponsor and directing people 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)
- 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 reception
- One (1) sponsor representative registration (with full conference access)
- Acknowledgment with a “ThankYou” post on NAPFA’s LinkedIn page

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
 - The conference mobile app
 - Email communication sent to conference attendees
 - Mention during general sessions
- 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)
- Two (2) push notifications sent out via mobile app thanking you as sponsor and directing people 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 Sponsorship

\$2,500

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

- Build relationships with attendees while delivering educational content on a topic of choice during a break in the Solutions Center
- Limited number of sponsorships available per event
- Sponsorship promoted on website and mobile app
- Acknowledgment with a "ThankYou" post on NAPFA's LinkedIn page

Event WiFi

\$6,900

Benefits include:

- Recognition on printed WiFi signage
- Recognition in pre-conference email to attendees
- Customized password for WiFi access
- One (1) push notifications sent out via mobile app thanking you as sponsor and directing people 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 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 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 or Conference Bag **\$3,000**

Benefits include:

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



Conference Bag Insert (limited to 5)

\$500

Benefits include:

- Promotional material stuffed into conference attendee registration bag
- Sponsor to provide materials

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.
- 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).
- 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



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.

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

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

Online Advertising
NAPFA Advisor Magazine

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.