



FPA®

ANNUAL
CONFERENCE

FPA Annual Conference 2023

SEPTEMBER 27-29, 2023 | PHOENIX, ARIZONA

EXHIBITOR PROSPECTUS

We are proud to be our members' *partner in planning*
and your partner in business success.



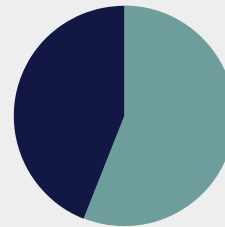
Meeting Snapshot

2.5 days of learning and networking

Up to 1,500 attendees

100+ exhibitors and companies

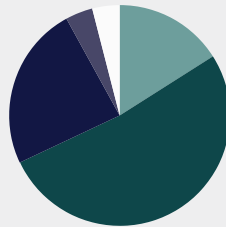
Assets Under Management



56% \$150M+

44% \$0-149M

Size of Firm (Employees)



16% Sole Practitioner

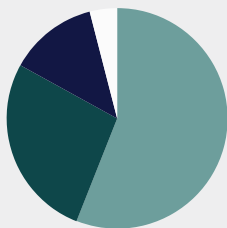
53% 2-10

24% 11-100

4% 101-499

4% 500+

Professional Role



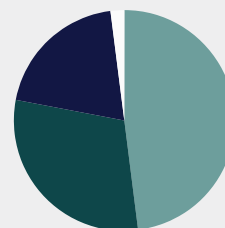
56% Owner/Partner

28% Employee

13% Independent Contractor

4% Other

Career Stage



48% Advanced

30% Mid

20% Early

2% Career Changer

Products and Services of Interest to Attendees

Investment products and solutions	Succession planning
Business vendors	Insurance firms
FinTech	RIA firms
Continuing education providers and universities	Brokerages
Potential CFP® professional employers	Wire Houses
Career coaches and consultants	And any company interested in providing a product or service to financial planners!

*Attendee data compiled from 2022 Annual Conference



Exhibitor Booths

Attendees are looking for new and better ways to do business. Be the credible source they learn from on the exhibit hall floor. Ship your build out or take advantage of our standard package listed above.

10' x 10' Booth \$9,000

10' x 20' Booth \$15,000

20' x 20' Booth \$25,000

All Exhibitors Receive

- 6' draped table, 2 chairs, wastebasket
- Black pipe and drape (8' back wall, 3' siderails)
- 17" x 11" ID sign
- A 1/2 page ad in an upcoming *Journal of Financial Planning* issue, which is a \$2,250 value
- Free access to meeting WiFi
- Two conference registrations that can be used to access the exhibit hall floor and attend sessions*
- Pre-and post-attendee lists that include name and USPS address (no email/phone)
- Listing within:**
 - » Conference signage
 - » FPA Annual Conference website, conference app, and onsite notebook
- Note: Booth purchase does not include carpet, electrical or wired internet. All can be purchased separately.

*Additional registrations may be purchased as needed

**If booth purchased by print or go-live date



FinTech UX \$7,500

Highlight your company in this sleek, high-impact space. FinTech UX exhibitors stand out with high-top tables, monitors for ease of demos, and an attention drawing LED wall. Plug in your laptop and you are "good-to-go." FinTech UX exhibitors also have the opportunity to present a 10-minute pitch during lunch breaks. FinTech UX exhibitors will also receive a *JFP Skyscraper Banner Ad* valued at \$750.

- 8' H x 1M tower with front panel graphics
- 2M counter with sliding doors, 2 stools, wastebasket, logo wrap
- Computer monitor
- Two 120-AMP power outlets



University Row \$1,000

Reserved for college or university-affiliated financial planning programs, this space provides the opportunity to share information about undergraduate or graduate programs. 10' x 10' space placed near the entrance of the hall.

Food & Beverages

Breakfast or Lunch \$15,000

Underwrite breakfast or lunch and bring attendees to the exhibit hall floor. The opportunity includes acknowledgement on signage at each food station, in the conference app, and onsite notebook. Opportunity is limited to one supporter per meal.

Specialty Hot Espresso Drinks \$10,000

Serve Starbucks from your booth and be one of the busiest places on the exhibit hall floor. The package includes an attendant, regular and decaf beans, a selection of syrups and milks, cups, sleeves, and all condiments. Espresso cart branding available for additional cost upon request.

Smoothie Bar \$10,000

Healthy smoothies made to order with seasonal berries, bananas, yogurt, and juice. The package includes an attendant, ingredients for 300 servings, blenders, cups, napkins, and service table. Additional smoothie packages can be purchased as needed.

Happy Hour Bar or Food Station \$7,500

Sponsor a bar or food station on the exhibit hall floor during an evening networking reception. Placed near your booth, the station will include signage or a wrap with your logo. Acknowledgement also includes onsite signage and in the conference app. Available to 10'x10' booths. Up to seven sponsorships available.

Cookie Oven \$6,000

Beckon attendees to your booth with the smell of freshly baked Otis Spunkmeyer cookies. The package includes an attendant, cookie oven, all baking and serving supplies, and three cases of cookies (200 each). Additional cases can be purchased as needed.

Fresh Popped Popcorn \$6,000

Serve freshly popped popcorn from your booth. The package includes an attendant, popcorn, serving bags (600 servings), and a service table. Additional popcorn kits can be purchased as needed.

Starbucks Bike \$5,000

Serve attendees while roaming the meeting space. The package includes a bike, cold brew coffee, flavored syrups, disposable cups and condiments.



Interactive Games & Activities

Golf Simulator \$10,500

Invite attendees to perfect their golf swing. While they wait their turn on the links, engage them in conversation. Branding opportunities offered for an additional fee.

Cash Cube \$12,500

Give attendees the opportunity to win a prize. Attendees step into a telephone booth sized enclosure and try to catch fake cash spinning around them. Prizes are the responsibility of the exhibitor. Branding opportunities like custom funny money or a decal offered for an additional fee.

Photo Booth \$10,000

Send attendees home with a memento. The digital photo booth features 2" x 6" photo strips, 4" x 6" postcards, color or black and white filters, backgrounds, and borders. Branded borders are available for an additional cost. Branding opportunities like decals or a wrap offered for an additional fee.

QB Challenge \$6,000

Attendees can test their accuracy with this football toss game. Includes a 3' x 6' structure with space for up to two players at a time. For an additional cost, FPA can source branded mini-football that attendees can keep after taking part in the challenge or brand the unit.

Basketball Double Pop-a-Shot \$6,000

Get a little competitive! The double pop-a-shot keeps score of attendees' shots in a timed game. For an additional cost, FPA can source branded mini-basketballs that attendees can keep after taking part in the challenge or brand the unit.

Giveaways & Services

Massage Station \$15,000

Give attendees 15 minutes of relaxation at the massage station. The experience includes a massage team for two days and multiple branding opportunities, including tee shirts for massage therapists, signage, and massage tickets. Attendees must stop by your booth to sign up and share their contact information to receive the timed ticket.





Tee Shirts \$15,000

Commemorate the meeting by handing out the official FPA tee shirt from your booth or providing tickets that attendees can use to pick up shirts nearby. Attendees must provide their contact information to receive a tee shirt. The opportunity includes 1,000 tee shirts with the FPA logo on the front and your logo on the back.

Headshots \$8,000

Help attendees refresh their professional headshots. The package includes a prep station with a mirror and hair products, photographer and on-site signage. Attendees must stop by your booth to sign up by providing their contact information and receive a ticket. After the conference, attendees will access their headshot via a branded email.

Cell Phone Chargers

Locker \$4,000

Provide attendees a safe place to charge their phone. Includes eight secure lockers, branding on a 19-inch display screen, and custom vinyl wrap.

Tabletop \$1,500

Offer attendees the opportunity to charge up while visiting your booth. Includes eight portable power banks and custom branding on the charging bay and chargers.

Tote Bags \$2,500

Bring your branded swag bag to hand out to attendees. Package includes the opportunity to greet attendees and hand out bags at the exhibit hall entrance. Your booth will be placed close to the hall entrance. FPA can supply bags at an additional cost.





Speaking Engagements

Guaranteed First Day \$14,500

Second or Third Day \$9,000

Showcase your expertise and dedication to the profession by providing powerful resources and insight into your company's area of focus. Host a 50-minute session with 10 minutes of live Q&A. Additional registration is provided for the speaker. Session content is subject to review and approval by the FPA Annual Conference Task Force. Sponsoring companies must also be exhibitors.



Attendee Outreach

Dedicated Email

Pre-Meeting \$8,000

Post-Meeting \$8,000

These will go fast! Reach all registered attendees – not just those who opted in to receive partner communications – before they arrive and encourage them to visit your booth, attend your session or event. A total of three emails will be sent prior to the meeting by FPA. Two emails will be sent following the meeting.

Pre-Meeting e-Newsletter \$2,500

Include a message in the official pre-meeting newsletter to attendees. Includes title, up to a 30-word insertion, and link to additional information. A total of three placements are available.

Onsite Notebook

Belly Band – Exclusive! \$6,000

Full-Page Ad \$2,500

Half-Page Ad \$1,500

Reinforce attendees' awareness of your brand by including your ad in the onsite notebook, attendees' only paper-based resource while at the meeting. The belly band package includes a full-page ad on the inside front cover.



Hotel and Convention Center Branding

WiFi \$10,000

Provide access to WiFi throughout the convention center. The supporter can create the WiFi password. Information will be listed in the onsite meeting notebook as well as onsite signage.

Conference App \$7,500

Be first in the only place attendees can access conference information like the full agenda, speaker presentations, and exhibitor listing. The opportunity includes a splash page when the app opens and a clickable sticky banner ad on the home page. Information to access the app will be listed in onsite notebook and signage.



Hotel Key Cards \$7,500

Brand the key cards attendees use to access their hotel rooms. Branding available on one or both sides of the card. Contract must be finalized by August 21, 2023.

Banners and Clings

Showcase your brand on banners or clings in high traffic areas throughout the Phoenix Convention Center. [Placement information](#) is available through our convention services partner, GES.

**All banners and clings are single-sided.*

Opportunity Name	Type	Dimensions	List Price	Opportunity Name	Type	Dimensions	List Price
B119	Cling	Various	\$2,500.00	B16 c	Banner	30'W x 8'H	\$5,000.00
B120	Cling	Various	\$2,500.00	B21	Banner	6' x 8'	\$5,000.00
B43	Cling	Various	\$2,500.00	B22	Banner	20' x 8'6"	\$5,000.00
BX28	Cling	Various	\$2,500.00	B23	Banner	7' x 8'	\$5,000.00
BX29	Cling	Various	\$2,500.00	B40	Banner	18.5' x 3'10"	\$5,000.00
BX30	Cling	Various	\$2,500.00	B41	Banner	18.5' x 3'10"	\$5,000.00
B106	Banner	16'6" x 4'10"	\$5,000.00	BX27	Cling	Various	\$5,000.00
B107	Banner	16'6" x 4'10"	\$5,000.00	B110	Banner	29' x 6'	\$5,000.00
B116	Cling	(2) 26" x 42'	\$5,000.00	B14	Banner	40'W x 8'H	\$7,500.00
B117	Cling	(2) 26" x 42'	\$5,000.00	B20	Banner	20' x 8.5'	\$7,500.00
B15 a	Banner	30'W x 8'H	\$5,000.00	B42	Cling	(4) 26" x 42'	\$10,000.00
B15 b	Banner	30'W x 8'H	\$5,000.00	B15 a/b/c	Banner	(3) 30'W x 8'H	\$15,000.00
B15 c	Banner	30'W x 8'H	\$5,000.00	B16 a/b/c	Banner	(3) 30'W x 8'H	\$15,000.00
B16 a/b/c	Banner	30'W x 8'H	\$5,000.00	B17	Banner	104' x 17'	\$30,000.00
B16 b	Banner	30'W x 8'H	\$5,000.00				



Events and Spaces

Roundtable \$12,000

Deliver value to attendees by diving deeper than a sales pitch. Engage up to 10 attendees in a two-hour conversation that provides both insight and feedback for your firm, as well as lively discussion amongst attendees. The package includes identification and invitation of attendees by FPA, a meeting room, and a participant list for 1x email follow-up. AV and F&B are an additional cost. A total of six roundtables are available.

Spaces and Places \$2,500

Support the diverse needs of attendees. FPA provides space in the convention center for specific audiences, including:

- Speaker Ready Room
- VIP Lounge
- Mothers' Room
- Sensory Inclusive Room

Sponsorship includes signage outside of the room and the opportunity to share marketing materials in the space.

DE&I Reception \$3,500

Join a diverse group of members to kick off the meeting with a networking reception. The package includes the opportunity to make remarks, signage, branding, logo placement, and networking. Estimated reach: up to 50. Opportunity cost only; F&B costs responsibility of sponsor.

Women and Finance Reception \$3,500

Support a fast-growing sector of financial planners! The package includes the opportunity to make remarks, signage, branding, logo placement, and networking. Estimated reach: up to 100. Opportunity cost only; F&B costs responsibility of sponsor.

NexGen Reception \$3,500

Host an evening reception for NexGen planners at FPA's largest annual conference. The event will include the opportunity to provide remarks at the top of the reception, branding, logo placement, and networking. Estimated Reach: 100. Opportunity cost only; F&B costs responsibility of sponsor.



Closing Night Party

Thursday, September 28 /
8:00-10:00pm MST / The Duce

Help up to 800 FPA Annual Conference attendees celebrate a successful event! Hosted at The Duce [theducephx.com], the most unique event and entertainment venue in the Phoenix warehouse district. The Closing Night Party will feature a band, food and drink and multiple activities.

All FPA Annual Conference Closing Party partners will be acknowledged for their support in the following ways:

- Logo on TV monitors at The Duce during the party
- On walk in slide during Annual Conference general sessions
- In an ad about the Closing Party in the on-site notebook
- On the FPA Annual Conference website
- In the FPA Annual Conference mobile app



Entertainment \$10,000

Headline the Closing Party and support of the musical entertainment. The opportunity includes three minutes on stage to greet attendees, a shout out from the band at the beginning and end of the party, and a banner above the stage with your message and/or logo.



Branded Bar Stations \$7,500

Help attendees kick back and celebrate. Opportunity includes a branded menu and napkins, and the option to serve a specialty drink in company colors. A total of five bar stations available.

Food Stations \$7,500

Fill attendees' bellies. Opportunity includes a branded menu, napkins, and décor in your company colors. A total of five food stations available.

Party Registration \$7,500

Be the first to welcome attendees to the Closing Party. The opportunity includes two pop up banners at the entrance to the Duce, two branded drink tickets for each attendee and a list of attendees (opt-in, USPS address only) for a one-time follow up.



Photo Booth \$5,000

Help attendees capture a fun moment with friends! This photo booth produces multiple images that include your logo. Attendees need to provide their email to receive the photo(s), so this becomes a lead gen tool for you too!

Game Station \$5,000

Give attendees the chance for a little competition – brand a ping pong table and corn hole boards. Package includes signage and logo on LED lit game boards.



Caricature Artist \$5,000

Provide a souvenir to attendees. A caricature artist will be onsite to sketch portraits on a special branded napkin with your logo on it!

Partner Application

Interested in exhibiting?

Krys Whildin

krys.whildin@naylor.com

(352) 333-3406

Exhibitor with questions?

Event Support Services

EventSupportServices@naylor.com



FPA Annual Conference
September 27-29, 2023
Phoenix Convention Center
Phoenix, AZ



Internal Use Only	
Date:	_____
Time:	_____
Staff Member:	_____

OFFICIAL IDENTIFICATION Company hereby authorizes FPA to advertise Company name as an exhibitor before, during and after the event, provided "Company Name" appears in writing with proper capitalization, abbreviations and punctuation. **Please list company name how you wish it to appear in any exhibitor listing.** (Please print clearly.)

Company Name (as to be listed at conference) _____

Main Address _____

City _____ State _____ ZIP/Postal Code _____

Company Main Phone _____ Website _____

Exhibit Contact Name _____ Title _____

Contact Phone _____ Email _____

SPEAKING ENGAGEMENT

A completed application is required in order to reserve any speaking engagement. Reservation of a booth is required to book a speaking engagement.

☐ **Speaking Engagement—Guaranteed First Day** **\$14,500**

☐ **Speaking Engagement** **\$9,000**

EXHIBITS

A completed application is required in order to reserve any booth space. Exhibitors are welcome to bring a booth build out. The standard exhibit space includes 1 table, 2 chairs, 1 trash can, ID sign, an ad in the JFP, standard wifi, two (2) conference registrations, and a pre and post-conference opt-in registration list for a 1x follow-up.

☐ **10x10 Exhibit Booth: \$9,000** **Booth preference: 1._____ 2._____ 3._____**

☐ **10x20 Exhibit Booth: \$15,000** **Booth preference: 1._____ 2._____ 3._____**

☐ **20x20 Exhibit Booth: \$25,000** **Booth preference: 1._____ 2._____ 3._____**

☐ **University Row: \$1,000**

☐ **10x10 Podcast Corner (By invite only): \$0**

FINTECH SHOWCASE EXHIBITS

☐ **FinTech Exhibit with Pitch Presentation** **\$7,500**

Each exhibit space includes a white high-top table, monitor, carpet, 1 table, 2 chairs, 1 trash can, standard wifi, two (2) conference registrations, and a post-conference opt-in registration list for a 1x follow-up. **The first ten confirmed FinTech exhibitors have the opportunity to present a 10-minute presentation** that will be delivered live and slotted within the conference agenda to allow attendees clear times to learn about FinTech solutions for their firm.

EXPERIENCE OR AMENITY

☐ **\$1,500–\$25,000**

Support educational programming and attendee experiences such as a wifi, coffee breaks, exhibit hall games (booth drivers), a massage station or closing night party. Ask for additional information.

Supported Item: _____



FPA Annual Conference
September 27-29, 2023
Phoenix Convention Center
Phoenix, AZ



Internal Use Only

Date: _____

Time: _____

Staff Member: _____

EXHIBIT RULES AND COMMITMENTS

Indemnification. Event Sponsor agrees to indemnify and hold harmless FPA, its affiliates, and their directors, officers, employees, agents, members, and insureds against any and all claims, actions, demands, liabilities, losses, damages, judgments, settlements, costs, expenses and fees (including attorney's fees) (collectively, the "**Losses**") insofar as such Losses, or actions in respect thereof, arise out of or are based on any negligence, failure or breach of any representation, warranty, covenant or agreement made by Event Sponsor while performing its duties hereunder including, but not limited to, personal injury, property damage, and any other claims.

Exhibit Booth and Attendees. FPA allows Event Sponsor to staff and manage the exhibit booth within FPA's guidelines provided by the contracted Event Management Company. At no time will Event Sponsor have the authority to place other companies within the purchased exhibit space without prior approval by FPA. Any attendee invited by Event Sponsor but not under direct employment with Event Sponsor requires prior approval by FPA to attend the event.

Hospitality Suites & Other Events. Any firm or organization wishing to host a hospitality suite or any other event in conjunction with the FPA Annual Conference must receive permission from FPA. FPA must be informed of the dates, times and locations for these events in advance, to ensure no conflict with other conference activities. Any effort to promote or host an event in conjunction with FPA's Annual Conference without the express permission of the FPA is in violation of this agreement and will result in forfeiture of future sponsorship opportunities with FPA.

SPEAKING ENGAGEMENT COMMITMENTS

Speaking Engagement Sponsors are required to meet all deliverable dates as identified in FPA's CADMIUM Speaker Management System, including items such as speaker information, content overview, outline and presentations as requested. Sponsors must receive FPA approval on the session and speaker, which shall be confirmed by May 1, 2023. Speakers agree not to sell or promote any particular product or service at any time during the session. Failure to meet FPA's content and speaking deadlines may result in forfeiture of payments and speaking session. Failure to adhere to speaker commitments may result in a ban from future FPA speaking opportunities.

PAYMENTS

For applications received on or before June 30, 2023: 50% DUE UPON RECEIPT of invoice; balance due no later than 8/1/2023.

For applications received after July 1, 2023: FULL AMOUNT DUE UPON RECEIPT of invoice.

All payments to be received in full no later than August 1, 2023.

CANCELLATION POLICY

Cancellations requested in writing prior to July 1, 2023 will result in a \$1,500 fee and a credit of the remaining balance for a future FPA engagement(s) to be used by 12/31/2024. Cancellations after this date will result in a \$5,000 fee and a credit of the remaining balance for a future FPA engagement(s) to be used by 12/31/2024.

☐ **CHECK TO REQUEST INVOICE (for check and ACH payments)**

☐ **PAY VIA CREDIT CARD (a 3% surcharge will be added)**

Card Number _____ CVV _____

Expiration Date _____

Name on Card _____

Return signed applications and payment to:

Financial Planning Association

Attn: Strategic Partnerships Team; Buffy Fletcher

1290 Broadway, Ste. 1625 Denver, CO 80203

Phone: 303-867-7149 **Email:** BFletcher@OneFPA.org

Authorization The individual signing this application is an authorized representative of Event Sponsor with full power to sign and deliver the application. Event Sponsor has read and understands all the rules and regulations including the cancellation policy.

Authorized Name (print) _____ Title _____

Authorized Signature _____ Date _____

In conjunction with FPA, the Financial Services Information Corporation (FSIC) may perform other ancillary services as part of the contractual relationship, which are administrative and will have no bearing on the intent of the engagement nor on the deliverables laid out in this agreement.