

Educate.

Advocate.

Integrate.

2019 SPONSORSHIP GUIDE



NAFA
ANNUITY
DISTRIBUTION
SUMMIT

OCTOBER 23-25, 2019

Château Élan Winery & Resort | Braselton, GA





Now in its eleventh year, the NAFA Annuity Distribution Summit brings top independent distributors and business partners together for one of the industry's most elite events. In addition to networking, business development, and education-focused interaction, attendees have the opportunity to discuss the issues impacting annuity distribution and position themselves to grow and thrive in the days ahead.

Consider sponsorship to get your company in front of an audience that includes:

**Owners | Managing Brokers | IMO/BGA Principals | C-Suite Executives (CEOs, CFOs, CMOs, CTOs)
VPs of Sales & Marketing | VPs of Government & Legal Affairs | Industry Media
Software & Technology Leaders | Indices Providers | And Many More!**

We'd like to extend a special "thank you" to those who sponsored our 2018 event and set the bar so high for what's to come this year!

KEYNOTE SPONSOR



DIAMOND SPONSORS



PLATINUM SPONSORS



GOLD SPONSORS



SILVER SPONSORS





PREMIER SPONSORSHIP LEVELS

This year's Annuity Distribution Summit will build on the momentum created last year with our diversified program content, offering endless opportunity for you to increase brand visibility in a way that suits your position in the annuity distribution space. Select the level that meets your needs, and use the add-on opportunities to create a customized package tailored to your organization's budget and sponsorship goals.

DIAMOND SPONSOR PACKAGE – \$20,000

- General session branding
- 8'x10' booth with back drape, side rails, table, two chairs, wastebasket and sign
- Three complimentary conference registrations
- Stage presence opportunity through speaker introduction
- Full-page ad and logo recognition in conference program
- Two-page article in the program and posted on NAFA website for 30 days post-conference (*content and layout provided by sponsor, and subject to NAFA approval*)
- Use of conference registration list upon request
- Exclusive sponsor promo email to full NAFA membership list (*art provided by sponsor*)
- Slide recognition between program speakers and during breaks
- Logo recognition in event email promotions
- Logo recognition in general event promotions
- Logo recognition in three email promotions highlighting Diamond sponsors
- Logo recognition in on-site signage
- Logo recognition on NAFA.com event page
- Recognition in NAFA social media posts (2x)
- Recognition from the meeting platform
- Attendee bag insert (*pre-approval required*)

PLATINUM SPONSOR PACKAGE – \$15,000

- General session branding
- 8'x10' booth with back drape, side rails, table, two chairs, wastebasket and sign
- Two complimentary conference registrations
- Full-page ad and logo recognition in conference program
- One-page article in the program and posted on NAFA website for 30 days post-conference (*content and layout provided by sponsor, and subject to NAFA approval*)
- Use of conference registration list two times upon request
- Slide recognition between program speakers and during breaks
- Logo recognition in general event promotions
- Logo recognition in one email promotion highlighting Diamond and Platinum sponsors
- Logo recognition in on-site signage
- Logo recognition on NAFA.com event page
- Recognition in NAFA social media posts (1x)
- Recognition from the meeting platform
- Attendee bag insert (*pre-approval required*)



GOLD SPONSOR PACKAGE – \$10,000

- General session branding
- 8'x10' booth with back drape, side rails, table, two chairs, wastebasket and sign
- One complimentary conference registration
- Half-page ad and logo recognition in conference program
- Use of conference registration list one time upon request
- Slide recognition between program speakers and during breaks
- Logo recognition in general event promotions
- Logo recognition in on-site signage
- Logo recognition on NAFA.com event page
- Recognition from the meeting platform
- Attendee bag insert (*pre-approval required*)

SILVER SPONSOR PACKAGE – \$7,500

- General session branding
- 8'x10' booth with back drape, side rails, table, two chairs, wastebasket and sign
- One complimentary conference registration
- Half-page ad and logo recognition in conference program
- Pre-event access to view conference registration list and post-event access to attendee mailing list
- Slide recognition between program speakers and during breaks
- Logo recognition in on-site signage
- Logo recognition on NAFA.com event page
- Recognition from the meeting platform
- Attendee bag insert (*pre-approval required*)

EXHIBITOR-ONLY PACKAGE – \$6,000 (\$8,000 for non-members)

- Five hours of dedicated time with attendees
- 8'x10' booth with back drape, side rails, table, two chairs, wastebasket and sign
- One complimentary conference registration (*includes admission to general sessions, breakouts and after hours*)
- Listing in conference program
- Access to view conference registration list post-event
- Opportunity to provide an item for inclusion in the attendee bags
- Invitation for up to three additional attendees at \$500 per guest





ADDITIONAL HIGH-IMPACT SPONSORSHIPS

Once you have selected your standard sponsorship package, maximize your brand visibility and impact with the following add-on opportunities available. The second price point shown is for those interested in sponsoring one of these opportunities stand alone.

KEYNOTE SPEAKER SPONSORSHIP

SOLD \$30,000

Each year, NAFA brings a highly acclaimed speaker and industry expert to the main stage to kick off its Annuity Distribution Summit. These juggernauts have addressed everything from leadership insights and ways to find your competitive edge to the everchanging political landscape. The keynote speaker session is highly promoted prior to the conference and heard by the vast majority of attendees, offering maximum recognition and visibility for your organization.

FEATURED SPEAKER SPONSORSHIP

\$15,000/\$20,000

In addition to the Summit's headliner, featured speakers cover the most pressing topics impacting the fixed annuity distribution today and tomorrow. These speakers also receive significant promotion prior to the event and draw a large audience of attendees. Featured speaker sponsors will have the opportunity to welcome their speaker to the main stage.

AFTER-HOURS EVENT SPONSOR

COST OF VENUE + FOOD/BEVERAGE +

SOLD ENTERTAINMENT (if needed)

Attract peak attendance by hosting an off-site special event on either evening of the conference. NAFA will help promote the after-hours via email and social media to its full membership list to ensure maximum awareness and engagement. Tickets or other branded materials for entrance into the event may be placed in the welcome bags.

RECEPTION BAR SPONSOR

\$6,000 + PRODUCTION OF NAPKINS /

\$8,000 + PRODUCTION OF NAPKINS (2 Available)

Though attendees may come and go from the program of the event, most all are sure to grab a beverage and participate in the opening and closing receptions. Your company logo will be prominently displayed in signage at the reception and your company name will be listed in the program accordingly. You also have the opportunity to provide cocktail napkins branded as you wish.

LUNCH SPONSORSHIP

\$4,000/\$6,000 (1 Available)

Offer attendees the opportunity to enjoy a delicious lunch during either conference day. Your company logo will be prominently displayed in signage at all the food stations and in the program.

BREAKFAST SPONSORSHIP

\$3,000/\$5,000 (1 Available)

Help all attendees start the day off right by sponsoring a hot breakfast buffet. Your company logo will be prominently displayed in signage at all the food stations and in the program.

COFFEE STATION SPONSORSHIP

\$2,500/\$3,500 (1 Available)

Give attendees a little pick-me-up by sponsoring a table of coffee, soft drinks and afternoon snacks during the program. Your company logo will be prominently displayed in signage at the table and in the program.



ADDITIONAL HIGH-IMPACT SPONSORSHIPS (CONT.)

NATIONAL ANTHEM

\$2,500/\$4,000

NAFA tradition in kicking off its premier events includes all attendees rising for the singing of the national anthem as performed by a special guest. The sponsor will have the opportunity to welcome the performer to the main stage. This will be done in conjunction with a special presentation of the colors.

MEETING ROOM WI-FI SPONSORSHIP

\$3,000 + COST FOR CONNECTIVITY / \$7,000 + COST FOR CONNECTIVITY

A wireless internet connection is essential for doing business today. What better way to get recognized than to sponsor Wi-Fi in the room where the main stage resides! Choose a customized network password that will be shared with attendees throughout the entire conference.

BRANDED HOTEL KEY CARD

SOLD *\$5,000 + COST OF PRODUCTION*

Get noticed from the time of check in to check out by branding the hotel key cards that will be distributed to all attendees to your organization. Given the frequent use of key cards during these events, your brand will continue to be front and center for guests.

BRANDED CONFERENCE LANYARD

SOLD *\$5,000 + COST OF PRODUCTION*

To enhance the conference networking experience, attendees will be given name badges for identification. Use that as an opportunity to maximize your organization's exposure by personalizing the lanyards on which the name tags hang with your logo and/or messaging.

BRANDED CHARGING STATION SPONSOR

\$2,500/\$3,500

Cell phone coverage is always spotty in hotels and outlets are at a premium for charging laptops and tablets in the meeting room. Be a hero and get noticed while attendees charge their devices at a branded charging station in or around a high-traffic location.

BRANDED IN-ROOM DROPS

\$3,000 + COST OF DELIVERY / \$4,000 + COST OF DELIVERY (2 Available)

Create a custom welcome package or attendance gift to be placed in the hotel room of each attendee that speaks to your company's value proposition. This gives attendees a reason to thank you in person or via email and can expand your reach with minimal effort.

ADDITIONAL BRANDING OPPORTUNITIES

Looking for just a touch of added visibility? Produce a 30-second commercial to be featured in a continuous loop in the expo hall. You might also consider using your own artwork to place on a window cling or banner that will be displayed just outside the expo hall, or a floor cling on display at the conference center entrance. (Note that sponsors and exhibitors are responsible for providing print-ready art or pre-produced video.)

- WINDOW CLING — \$2,000 + COST OF PRODUCTION*
- BANNER — \$3,000 + COST OF PRODUCTION*
- FLOOR CLING — \$1,000 + COST OF PRODUCTION*
- VIDEO WALL COMMERCIAL — \$500*

Interested in a sponsorship or branding opportunity not listed? Contact Bailey Sorensen or Janet Terpening for help turning your idea into results.

414.332.9306 | bailey@nafa.com | janet@nafa.com



2019 EXHIBITOR/SPONSOR AGREEMENT

- Exhibit space is limited, may sell out and is sold on a first-paid basis.
- Exhibit hall hours allow for Summit attendees to visit exhibits of their choice. Refreshments and meals will be offered within the exhibit area.
- Exhibitors are encouraged to provide door prizes to support the event and drive attendee engagement.
- An 8'x10' booth with back drape, side rails, table, two chairs, wastebasket and sign will be provided.
- All Summit attendees will be provided name badges. Badges serve as identification and access to Summit events.
- Exhibitors are eligible for Summit hotel rates and are responsible for securing reservations and arrangements.
- All charges for travel, guest rooms, shipping, material handling, booth electrical, booth Wi-Fi and other expenses incurred by the exhibitor will be payable by the exhibitor directly to the exhibitor services company, hotel or travel vendor.
- No partial registration rates, partial event passes or sharing of registration will be permitted.

MEETING EXPO HALL CODE OF CONDUCT

NAFA is dedicated to providing a harassment-free meeting (Annuity Distribution Summit) experience for everyone, regardless of gender, sexual orientation, disability, physical appearance, body size, race or religion. We do not tolerate harassment of meeting participants in any form. Sexual language and imagery is not appropriate for any conference venue, including talks. Meeting participants (including speakers, sponsors, staff or guests) violating these rules may be sanctioned or expelled from the meeting without a refund at the discretion of the President and CEO.

Any form of written, social media or verbal communication that can be offensive or harassing to any attendee, speaker or staff is not allowed. Please inform a NAFA staff member if you feel a violation has taken place and he or she will address the situation.

Harassment includes offensive verbal comments related to gender, sexual orientation, disability, physical appearance, body size, race, religion; sexual images in public spaces; deliberate intimidation; stalking; following; harassing photography or recording; sustained disruption of talks or other events; inappropriate physical contact; and unwelcome sexual attention. Participants asked to stop any harassing behavior are expected to comply immediately. Exhibitors in the expo hall, sponsor or strategic partner booths, or similar activities are also subject to the anti-harassment policy. In particular, exhibitors should not use sexualized images, activities or other material. Booth staff (including volunteers) should not use sexualized clothing/uniforms/costumes, or otherwise create a sexualized environment.

NAFA prides itself on being an organization that thrives on open and honest dialog and respectful partnerships. That said, no strategic partner, exhibitor, sponsor, speaker or vendor may aggressively pursue meeting attendees for the purpose of securing attention of their booth, product or business offering. Aggressive "sales" tactics will not be allowed and violation of this rule may cause sanctioning or expulsion from the meeting without a refund.

Booth spaces are assigned by the NAFA staff. Strategic partners displaying in the expo hall may not move their location without permission of the NAFA staff. Please be respectful of neighboring displays. Do not intentionally block others from view, take other exhibitors' display items, or speak disrespectfully to or about other exhibitors displaying in the expo hall. Violators of these rules may be sanctioned or expelled from the expo hall without refund.

NAFA is appreciative of its relationships with its strategic partners; therefore, NAFA cannot promote one strategic partner over another except as outlined in the sponsorship guides and dictated by sponsorship levels.

Sponsorship and/or strategic partnership does not provide speaking opportunity from the main stage or in breakouts at our meetings. Program details are created by the Program Committee and participants are contacted and asked to speak for the benefit of the meeting content and NAFA's membership, not for infomercial purposes.



*SAVE THE DATE ...
AND SECURE YOUR SPONSORSHIP!*

ANNUITY DISTRIBUTION SUMMIT

OCTOBER 7-9, 2020

HYATT REGENCY TAMAYA | SANTA ANA PUEBLO, NM

Contact Bailey Sorensen or Janet Terpening for more information.

414.332.9306 | bailey@nafa.com | janet@nafa.com



PROGRAM SPECS

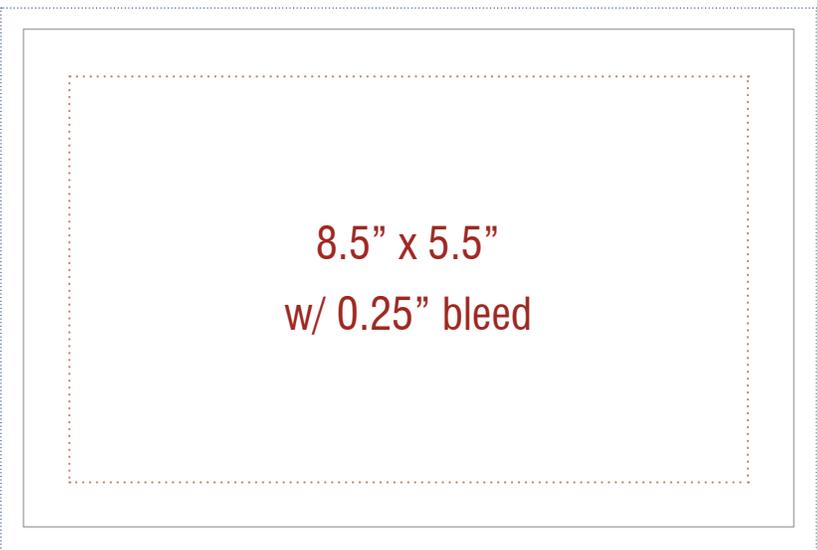
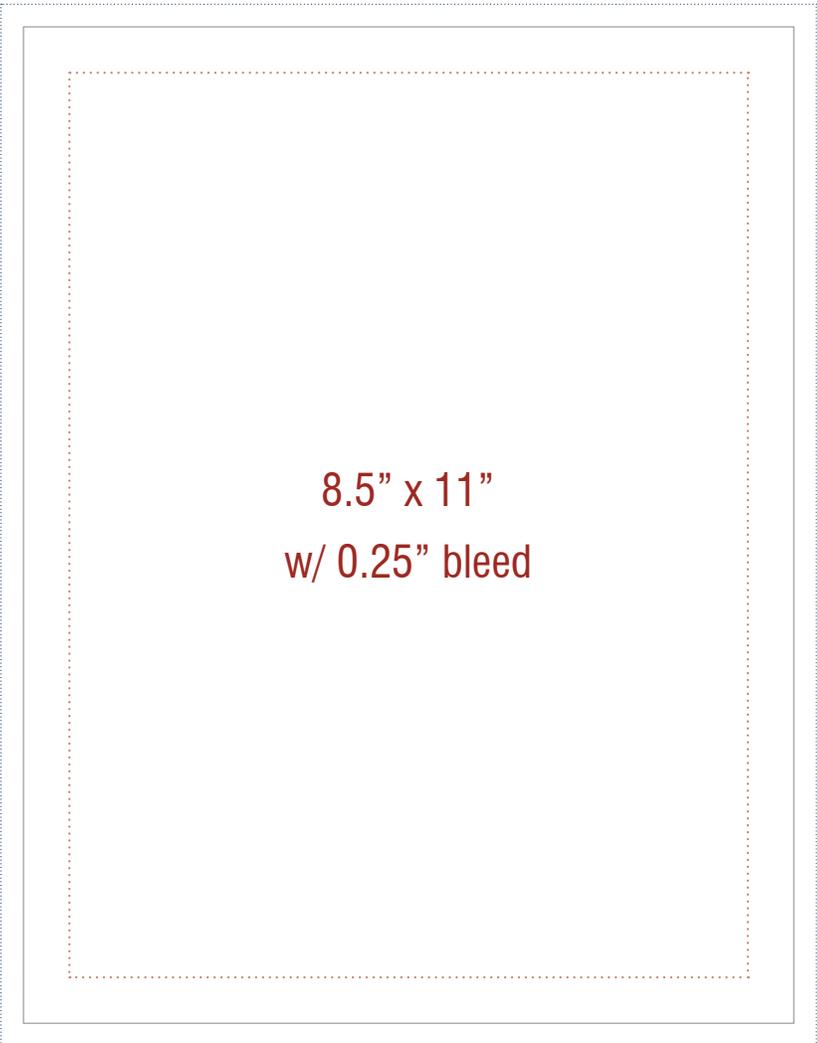
Trim Size: 8.5" x 11"

Bleed Size: 0.25"

Live Area: 0.5" from trim

AD and ARTICLE PREPARATION SPECS

1. Ads/articles must be built to exact size, CMYK and at a minimum of 300 DPI. Full color and full bleed is preferred for all ads/articles.
2. Ads can be created using Adobe InDesign, Adobe Photoshop or Adobe Illustrator. The Adobe InDesign template for the article will be provided. Please do not create ads/articles in Microsoft Word, WordPerfect or any other word processing program.
3. Ads/articles must be provided as high-resolution PDF files with all fonts outlined.
4. Email your company's final art to bailey@nafa.com or janet@nafa.com.
5. Questions about your ad, article or sponsorship package?
Contact Bailey Sorensen at bailey@nafa.com or Janet Terpening at janet@nafa.com.





SPONSOR CHECKLIST

- Company logo for promotion (due upon sponsorship commitment)**
 - Vector format preferred (.ai or .eps) but a high resolution .png is also acceptable

- Ad for the program (due Friday, October 4)**
 - Half page (Gold and Silver Sponsors), full-bleed, color ad 8.5"x 5.5", bleed: 0.25"
 - Full page (Diamond and Platinum Sponsors), full-bleed, color ad 8.5"x 11", bleed: 0.25"

- One- and two-page articles (due Friday, September 27)**
 - Diamond Sponsors: two-page spread (full-bleed, color article 17"x 11", bleed: 0.25", margins 0.5" from binding edge)
 - Platinum Sponsors: one-page article (full-bleed, color article 8.5"x 11", bleed: 0.25", margin 0.5" from binding edge)
 - The InDesign article template will be provided upon request.

- Welcome bag inserts (delivery date of Friday, October 18)**
 - Bag inserts can be printed fliers or any type of branded merchandise designed to be given to the attendees at registration. Please note on the package that contents are for registration bag stuffers. Ship to the following address:

Château Élan Winery & Resort
Attn: NAFA Annuity Distribution Summit
100 Rue Charlemagne
Braselton, Georgia 30517

- Expo hall booth (notify NAFA by Friday, September 27)**
 - Contact Bailey at bailey@nafa.com or Janet at janet@nafa.com to reserve a booth.
 - NAFA is providing a 8 ft. skirted table and two chairs.
 - Expo contact and shipping information to follow.
 - Electricity, internet and other needs for your booth can be arranged through PSAV.
 - Check with registration desk for set up time assignment. Set up times will fall between 8:00 a.m. and 11:30 a.m.
 - NAFA will provide you with tear-down instructions on site.



Name _____ Company Name _____

Company Mailing Address _____

City _____ State _____ ZIP _____

Email (required) _____

Alternate email to send copy of confirmation _____

Choose Sponsorship Level NAFA Member NAFA Non-Member

Diamond Platinum Gold Silver

Additional Sponsorship Opportunities

Keynote (\$30,000) Featured Speaker Sponsorship (\$15,000 – \$20,000)

After-Hours Event Sponsor (Cost of Venue + Food/Beverage + Entertainment)

Reception Bar Sponsor (\$6,000/\$8,000 + Production of Napkins)

Lunch Sponsorship (\$4,000/\$6,000)

Breakfast Sponsorship (\$3,000/\$5,000)

Coffee Station Sponsorship (\$2,500/\$3,500)

National Anthem (\$2,500/\$4,000)

Meeting Room Wi-Fi Sponsorship (\$3,000/\$7,000 + Cost for Connectivity)

Branded Hotel Key Card (\$5,000 + Cost of Production)

Branded Conference Lanyard (\$5,000 + Cost of Production)

Branded Charging Station Sponsor (\$2,500/\$3,500)

Branded In-Room Drops (\$3,000/\$4,000 + Cost of Delivery)

Window Cling (\$2,000 + Cost of Production) Banner (\$3,000 + Cost of Production)

Floor Cling (\$1,000 + Cost of Production) Video Wall Commercial (\$500)

Choose Payment Option

I'm mailing my check payable to NAFA to: NAFA, ICO Anick & Associates, 11933 W Burleigh St., Wauwatosa, WI 53222

Please charge my American Express, Discover, MasterCard or Visa: \$ _____

Credit Card # _____ Exp. Date _____ CCV Code _____

Name on Card _____ Signature _____

Street Address _____

City _____ State _____ ZIP _____

Billing address same as above

*Return this form via fax to 415.946.3532 or email to
bailey@nafa.com or janet@nafa.com.*





NAFA
**ANNUITY
DISTRIBUTION
SUMMIT**



NAFA is the authority on fixed annuities. Our mission is to promote the awareness and understanding of fixed annuities. NAFA educates annuity salespeople, regulators, legislators, journalists, and industry personnel about the value of fixed annuities and their benefits to consumers. NAFA's membership represents every aspect of the fixed annuity marketplace covering 85% of fixed annuities sold by independent agents, advisors and brokers. NAFA was founded in 1998.

www.nafa.com