

Educate.

Advocate.

Integrate.

2024 SPONSORSHIP GUIDE



JUNE 24–25, 2024

The Ritz-Carlton Washington, D.C. | Washington, D.C.



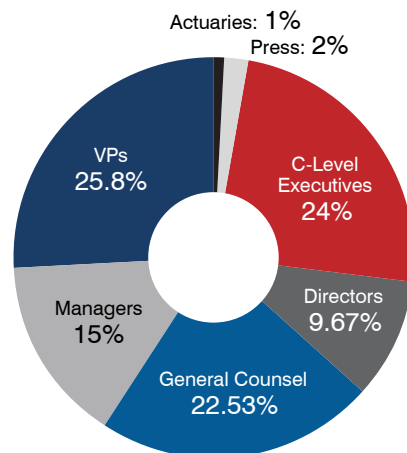


Our 14th annual Annuity Leadership Forum will bring together individuals from all arms of distribution to discuss the most pertinent issues impacting fixed annuity regulation, legislation and innovation. This year's event will capture the most engaging aspects of previous Forums, including our annual Hill Walk, in a fast-paced, interactive format that will increase overall value for attendees and sponsors.

Consider sponsorship to promote your company to a diverse audience of industry leaders!

Through your continued engagement and support, NAFA can lead the charge in protecting the future of fixed annuities. We'd like to extend a special "thank you" to those who sponsored our 2023 event:

FORUM ATTENDEE BREAKDOWN



KEYNOTE SPONSOR



DIAMOND SPONSORS



PLATINUM SPONSORS



GOLD SPONSORS



SILVER SPONSORS





PREMIER SPONSORSHIP LEVELS

This year's Annuity Leadership Forum will feature robust program content, offering an array of opportunities for you to increase brand visibility and establish your company as one that exemplifies annuity leadership. 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 for Members/\$25,000 for Non-Members

- General session branding
- Premier 8' x 3' display table
- Three complimentary conference registrations for company staff
- Stage presence opportunity through speaker introduction
- 8.5"x11" digital ad PDF and logo recognition in conference app
- Use of conference registration list upon request
- Exclusive sponsor promo email to full NAFA membership list (art provided by sponsor or with the support of NAFA)
- Slide recognition between program speakers and during breaks
- Logo recognition in event email promotions
- Logo recognition in on-site signage
- Logo recognition and >2-minute video or still promo on digital displays
- Logo recognition on NAFA.com event page
- Recognition in NAFA social media posts (2x)
- Recognition from the meeting platform
- One branded swag item and one printed insert for attendee bags (pre-approval required)
- Recognition as a sponsor of National Annuity Awareness Month on AnnuRetirement.com
- Recognition in social post(s) and email promotion(s) of NAAM
- Up to four consumer and/or industry professional resources posted to AnnuRetirement.com
- Official NAAM sponsor badge for use on company website and/or in email signatures

PLATINUM SPONSOR PACKAGE – \$15,000 for Members/\$20,000 for Non-Members

- General session branding
- Premier 8' x 3' display table
- Two complimentary conference registrations for company staff
- 8.5"x11" digital ad PDF and logo recognition in conference app
- One-time use of conference registration list pre- and post-event
- Slide recognition between program speakers and during breaks
- Logo recognition in event email promotions
- Logo recognition in on-site signage
- Logo recognition and >2-minute video or still promo on digital displays
- Logo recognition on NAFA.com event page
- Recognition in NAFA social media posts (1x)
- Recognition from the meeting platform
- One branded swag item and one printed insert for attendee bags (pre-approval required)
- Recognition as a sponsor of National Annuity Awareness Month on AnnuRetirement.com
- Recognition in social post(s) and email promotion(s) of NAAM
- Up to four consumer and/or industry professional resources posted to AnnuRetirement.com
- Official NAAM sponsor badge for use on company website and/or in email signatures





GOLD SPONSOR PACKAGE – \$10,000 for Members/\$15,000 for Non-Members

- General session branding
- Premier 8' x 3' display table
- One complimentary conference registration for company staff
- 8.5"x11" digital ad PDF and logo recognition in conference app
- One-time use of conference registration list upon request
- Slide recognition between program speakers and during breaks
- Logo recognition in event email promotions
- Logo recognition in on-site signage
- Logo recognition on NAFA.com event page
- Recognition from the meeting platform
- One printed insert for attendee bags (pre-approval required)
- Recognition as a sponsor of National Annuity Awareness Month on AnnuRetirement.com
- Recognition in social post(s) and email promotion(s) of NAAM
- Up to four consumer and/or industry professional resources posted to AnnuRetirement.com
- Official NAAM sponsor badge for use on company website and/or in email signatures

SILVER SPONSOR PACKAGE – \$7,500 for Members/\$10,000 for Non-Members

- General session branding
- Premier 8' x 3' display table
- One complimentary conference registration for company staff
- 8.5"x11" digital ad PDF and logo recognition in conference app
- Access to view conference registration list prior to event
- 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
- One printed insert for attendee bags (pre-approval required)
- Recognition as a sponsor of National Annuity Awareness Month on AnnuRetirement.com
- Recognition in social post(s) and email promotion(s) of NAAM
- Up to four consumer and/or industry professional resources posted to AnnuRetirement.com
- Official NAAM sponsor badge for use on company website and/or in email signatures

EXHIBITOR-ONLY PACKAGE

\$5,000 for Members/\$7,500 for Non-Members

- Five hours of dedicated time with attendees
- Premier 8'x3' display table
- One complimentary conference registration for company staff (includes admission to general sessions, breakouts and after hours)
- 8.5"x11" digital ad PDF and logo recognition in conference app
- One-time use of the conference registration list pre- and post-event
- One printed insert for attendee bags (pre-approval required)
- Invitation for up to three additional attendees at \$500 each

NATIONAL ANNUITY AWARENESS

MONTH SPONSOR PACKAGE – \$3,500

- Recognition as a sponsor of National Annuity Awareness Month on AnnuRetirement.com
- Recognition in social post(s) and email promotion(s) of NAAM
- Up to four consumer and/or industry professional resources posted to AnnuRetirement.com
- Official NAAM sponsor badge for use on company website and/or in email signatures





ADDITIONAL HIGH-IMPACT SPONSORSHIPS & BRANDING OPPORTUNITIES EXCLUSIVELY FOR MEMBERS

Once you have selected your standard sponsorship package, maximize your brand visibility and impact with the following add-on opportunities. Not a NAFA member? Email Bailey Sorensen at bailey@nafa.com for complete membership details and immediate access to these premier value-adds!



KEYNOTE SPEAKER SPONSORSHIP – \$20,000

Each year, NAFA brings a highly acclaimed speaker and industry expert to the main stage to kick off its Annuity Leadership Forum. 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 – \$10,000

In addition to the Forum's headliner, featured speakers cover the most pressing topics impacting the fixed annuity industry 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 SPONSORSHIP – \$8,000

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.

CONFERENCE APP SPONSORSHIP – \$8,000

Technology is everything these days, so why not help attendees make the most of their time together by augmenting the in-person experience with a mobile app? Harness the app to promote your business by featuring your logo on the app landing page and through push notifications during the event.

RECEPTION BAR SPONSORSHIP – \$5,000 (Includes Branded 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.





ADDITIONAL HIGH-IMPACT SPONSORSHIPS & BRANDING OPPORTUNITIES (CONT.)

LUNCH SPONSORSHIP – \$5,000 (2 Available)

Offer attendees the opportunity to enjoy a delicious lunch during the IMO and carrier roundtables on the opening day, or in preparation for the Hill Walk on day two. Your company logo will be prominently displayed in signage at all the food stations.

BREAKFAST SPONSORSHIP – \$3,500 (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.

WOMEN'S ANNUITY NETWORK BREAKFAST SPONSORSHIP – \$5,000 (1 Available)

With women becoming increasingly responsible for their financial futures, it's no surprise that our industry is seeing a growth in female leadership. Help us celebrate the launch of the Women's Annuity Network by sponsoring a kickoff breakfast for this inspiring group of women working to make us all more successful.

COFFEE STATION SPONSORSHIP – \$3,500 (Includes Branded Cups) (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 on branded coffee cups and on signage at the table.

NATIONAL ANTHEM SPONSORSHIP – \$2,500

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. This is a particularly meaningful symbol of patriotism at the Annuity Leadership Forum in our nation's capital. The sponsor will have the opportunity to welcome the performer to the main stage.

MEETING ROOM WI-FI SPONSORSHIP – \$5,000

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 SPONSORSHIP – \$6,000

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.



ADDITIONAL HIGH-IMPACT SPONSORSHIPS & BRANDING OPPORTUNITIES (CONT.)

BRANDED CONFERENCE LANYARD SPONSORSHIP – \$6,000

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 SPONSORSHIP – \$3,000

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 TRANSPORTATION GIFT CARDS – \$3,000

Streamline the exciting experience of walking the Hill for attendees by helping offset the cost of transportation to and from the Congressional buildings. Hill Walk participants will receive Uber gift certificates in a card sleeve branded for your company.

BRANDED IN-ROOM DROPS – \$2,500 + 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.

BRANDED UMBRELLAS – \$2,500 + COST OF PRODUCTION

The weather is always questionable in the nation's capital, so do your guests a favor and have a branded umbrella handy for attendees. Not only will these offer brand visibility during the event, but they'll continue keeping attendees dry once they return home.

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 or janet@nafa.com



ANNUITY DISTRIBUTION SUMMIT

OCTOBER 2-3, 2024

THE RITZ-CARLTON, LAS COLINAS | DALLAS, TX

SAVE THE DATE ... AND SECURE YOUR SPONSORSHIP!

It's never too soon to plan ahead for NAFA's fall conference! This premier industry event brings principals and other high-level industry professionals together to address the most important issues impacting fixed annuity distribution. What's more, we're venturing to the essence of Texas escapism just outside of Dallas. This exciting location will serve as the perfect backdrop for collaborating on how best to celebrate the annuity's value proposition while strategizing how to leverage our powerful products to secure the future of retirement for more Americans.

The event will take place at The Ritz-Carlton, Las Colinas, situated on 400 breathtaking acres and packed with luxurious amenities. Whether you're looking to fill your free time with a round of golf on one of two 18-hole courses on property, by taking a relaxing dip in the pool or by destressing with a spa treatment, you can do so with ease. What's more, you'll be able to maximize your return on investment by walking away with ideas for positioning your business to compete and thrive in an ever-changing marketplace.

Capitalize on the opportunity to showcase your business and enjoy the focused attention of a top-notch audience. Your participation and engagement connects you to one of the most anticipated and exciting industry events of the year.

Contact Bailey Sorensen or Janet Terpening for more information.

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



The Ritz-Carlton Washington, D.C. | Washington, D.C. | JUNE 24–25, 2024



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

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 ☐ Exhibitor-Only ☐ National Annuity Awareness Month Sponsorship

Additional Sponsorship Opportunities

☐ Keynote (\$20,000) ☐ Featured Speaker Sponsorship (\$10,000)

☐ After-Hours Event Sponsor (\$8,000) ☐ Conference App Sponsor (\$8,000)

☐ Branded Key Card Sponsor (\$6,000) ☐ Reception Bar Sponsor (\$5,000)

☐ Women's Annuity Network Breakfast Sponsor (\$5,000) ☐ Lunch Sponsor (\$5,000)

☐ Breakfast Sponsor (\$3,500) ☐ Coffee Station Sponsor (\$3,500) ☐ National Anthem Sponsor (\$2,500)

☐ Meeting Room Wi-Fi Sponsor (\$5,000) ☐ Branded Conference Lanyard Sponsor (\$6,000)

☐ Branded Charging Station Sponsor (\$3,000) ☐ Branded Transportation Gift Cards Sponsor (\$3,000)

☐ Branded In-Room Drops (\$2,500 + Cost of Delivery) ☐ Branded Umbrellas (\$2,500 + Cost of Production)

Choose Payment Option

☐ I'm mailing my check payable to NAFA to:

NAFA, ICO O'Leary & Anick 13400 Bishops Lane, Suite 120, Brookfield, WI 53005

☐ 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



The Ritz-Carlton Washington, D.C. | Washington, D.C. | JUNE 24–25, 2024



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 app (due Friday, May 24)**

- One-page ad, 8.5"x 11"

☐ **Video for digital display Diamond and Platinum Sponsors Only (due Friday, May 24)**

- Resolution of 1920p x 1080p in .mp4 format
- Two minutes or less
- Audio will not be available on these displays so subtitles are encouraged

☐ **Welcome bag inserts (due Friday, June 21)**

- Bag inserts can be printed fliers or any type of branded merchandise designed to be given to the attendees at registration. Please clearly label the shipment for the NAFA registration table. Ship to the following address and ensure arrival **does not occur prior to June 19**:

The Ritz Carlton Washington, D.C.
Attn: NAFA Annuity Leadership Forum
1150 22nd St NW, Washington, DC 20037

☐ **Expo hall table (notify NAFA by Friday, May 24)**

- Contact Janet at janet@nafa.com or Bailey at bailey@nafa.com to reserve table.
- NAFA is providing an 8 ft. skirted table and two chairs.
- Expo contact and shipping information to follow. All expo items shipped should be clearly marked as "table items" and sent to the attention of the onsite company point person that will be listed in your instructional email. Ensure arrival of items **does not occur prior to June 19**.
- Electricity, internet and other needs for your booth can be arranged through PSAV.
- Check with registration desk for set up time assignment.
- NAFA will provide you with tear-down instructions on site.