

*Educate.*

*Advocate.*

*Integrate.*

# *2025 SPONSORSHIP GUIDE*



**OCTOBER 15 - 16, 2025**

Hyatt Regency | Savannah, GA







With annuity sales continuing their record-breaking sales pace, now's the perfect time to convene, collaborate and connect with fellow industry leaders to stay one step ahead of consumer needs! NAFA's 17th annual Annuity Distribution Summit will bring top independent distributors and business partners together for networking, business development and education-focused interaction, positioning attendees to proactively recognize, discuss and address the issues impacting annuity distribution.

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

**Owners | Managing Brokers | IMO/BGA Principals | C-Suite Executives**  
**VPs of Sales & Marketing | Directors 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 2024 Summit, which helped position our attendees to capitalize on the growing need for consumers to use fixed and fixed indexed annuities to secure their retirement future!

#### KEYNOTE SPONSOR



**Nationwide®**  
is on your side

#### DIAMOND SPONSORS



**Nationwide®**  
is on your side



**S&P Dow Jones  
Indices**  
A Division of **S&P Global**



#### PLATINUM SPONSORS



#### GOLD SPONSORS



#### SILVER SPONSORS





## PREMIER SPONSORSHIP LEVELS

This year's Annuity Distribution Summit will build on diversified program content offerings in our proven, power-packed delivery format that maximizes the value of this two-day event. Increase your organization's brand visibility in a way that suits your position in the annuity distribution space by selecting the level that meets your needs. Or, contact us to discuss using add-on opportunities to create a customized package tailored to your organization's budget and sponsorship goals!

### ***DIAMOND SPONSOR PACKAGE – \$25,000***

- General session branding
- Tabletop exhibit space with 6' table, two chairs, waste basket and sign
- Four complimentary conference registrations
- Stage presence opportunity by donating a swag item or prize to be given away during a speaker session
- Ad, logo recognition and fully customizable profile in conference app
- Two-page article 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 email promotions highlighting Diamond sponsors
- Logo recognition in on-site signage
- Logo recognition on NAFA.com event page
- Recognition on NAFA social media channels
- Recognition from the meeting platform
- Attendee bag insert *(pre-approval required)*

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### ***PLATINUM SPONSOR PACKAGE – \$20,000***

- General session branding
- Tabletop exhibit space with 6' table, two chairs, waste basket and sign
- Three complimentary conference registrations
- Stage presence opportunity by donating a swag item or prize to be given away during a speaker session
- Ad, logo recognition and fully customizable profile in conference app
- One-page article 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 on NAFA social media channels
- Recognition from the meeting platform
- Attendee bag insert *(pre-approval required)*



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## **GOLD SPONSOR PACKAGE – \$15,000**

- General session branding
- Tabletop exhibit space with 6' table, two chairs, waste basket and sign
- Two complimentary conference registrations
- Ad, logo recognition and fully customizable profile in conference app
- Use of conference registration list both pre- and post-event 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*)

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## **SILVER SPONSOR PACKAGE – \$10,000**

- General session branding
- Tabletop exhibit space with 6' table, two chairs, waste basket and sign
- One complimentary conference registration
- Logo recognition and fully customizable profile in conference app
- One-time use of the conference registration list pre- or post-event upon request
- 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*)







*SHOWCASE YOUR COMMITMENT TO #ANNUITYLEADERSHIP BY SPONSORING ONE OR BOTH OF THESE EXCLUSIVE SESSIONS!*



***FUTURE LEADERS FELLOWSHIP SPONSOR – \$4,000 (3 Available to Members Only)***

Increase your level of visibility by supporting our industry's future leaders! Our hand-selected up-and-coming professionals will experience a private training course and the opportunity to exclusively engage with their peers, fostering authentic relationships that elevate leadership trajectories. Sponsorship includes:

- Logo recognition on signage
- Opportunity to contribute one company-branded item exclusively for this group
- Recognition in the private Master Class
- One-time branded sponsor promo to the group welcoming them to the training



***WOMEN'S ANNUITY NETWORK SPONSOR – \$4,000 (5 Available to Members Only)***

Launched in 2024, the Women's Annuity Network is an initiative dedicated to fostering the growth and success of women leaders in the finance industry! Sponsor this exciting luncheon featuring Kelly McDonald, four-time bestselling author and renowned professional speaker who will share tips and best practices for helping women lead assertively, effectively and in a manner that propels businesses forward. Sponsorship includes:

- Logo recognition on signage
- Opportunity to contribute one company-branded item exclusively for this group
- Recognition in the private luncheon
- One-time branded sponsor promo to the group welcoming them to the luncheon



## 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. If you're not currently a NAFA member but interested in sponsoring one of these opportunities stand alone, contact **Janet Terpening** for more information including non-member pricing.

### KEYNOTE SPEAKER SPONSOR

**\$30,000**

**SOLD**

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 SPONSOR

**\$15,000 (2 Available)**

In addition to the Summit's headliner, two additional featured speakers will cover pressing topics impacting fixed annuity distribution today and tomorrow: what's to come in our future economy and the evolution of high-performing teams. These speakers will receive significant promotion prior to the event and draw a large audience of attendees, while the featured speaker sponsors will have the opportunity to welcome their speaker to the main stage.

### AFTER-HOURS ENTERTAINMENT SPONSOR

**Contact NAFA for Pricing**

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.

### AFTER-HOURS ACTIVITY SPONSOR

**Contact NAFA for Pricing and Availability**

Knowing that NAFA's after-hours are an attendee favorite, take the opportunity to elevate their experience by hosting a special activity during the evening. We'll work directly with you and our After-Hours Entertainment Sponsor to promote the offering to our full membership list to ensure maximum awareness and engagement. Tickets or other branded materials for participation in the activity may be placed in the welcome bags.

### MIX & MINGLE BAR SPONSOR

**\$7,000 (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 app accordingly.

### MIX & MINGLE ENTERTAINMENT SPONSOR

**\$6,000 (2 Available)**

As the event's attendees all gather to connect and collaborate, provide an exceptional ambience by sponsoring unique entertainment during the opening reception. From the musical stylings of some of our very own talented members to outside-the-box acts, kick off the Summit with flair and fun that represents your organization and your brand.



## ADDITIONAL HIGH-IMPACT SPONSORSHIPS (CONT.)



### *BRANDED HOTEL KEY CARD SPONSOR*

*\$7,000*

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.

### *MEETING ROOM WI-FI SPONSOR*

*\$7,000*

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 CONFERENCE LANYARD SPONSOR*

*\$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.

### *CONFERENCE APP SPONSOR*

*\$5,000*

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, as well as on signage, during the event.

### *HEADSHOT BOOTH SPONSOR*

*\$5,000*

Provide colleagues with a unique, memorable takeaway by sponsoring a professional photographer in taking and delivering a new headshot to each attendee. In addition to your logo on booth signage, you will be recognized in a pre-conference email to those registered setting expectations about this opportunity.

### *LUNCH SPONSOR*

*\$4,000 (2 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 app.

### *BREAKFAST SPONSOR*

*\$4,000*

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 app.

### *BRANDED IN-ROOM DROPS SPONSOR*

*\$4,000 (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. By providing a pre-paid return address label, any extra product will be returned to you after the event to stretch your investment.

### *COFFEE STATION SPONSOR*

*\$4,000 (2 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.



## ADDITIONAL HIGH-IMPACT SPONSORSHIPS (CONT.)

### *BRANDED CHARGING STATION SPONSOR*

*\$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.



### *NATIONAL ANTHEM SPONSOR*

*\$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. 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.

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

414.332.9306 | [janet@nafanet.com](mailto:janet@nafanet.com)







## 2025 EXHIBITOR/SPONSOR FAQs

- 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 company-branded promotional items and “swag” to support the event and drive attendee engagement.
- A tabletop exhibit space with 6’ 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.
- A sponsor checklist is provided to the primary company contact to ensure timely return and inclusion of all collateral due to NAFA.



# 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.





# SPONSOR CHECKLIST

☐ **Company logo for promotion (due upon sponsorship commitment)**

- Vector format preferred (.ai or .eps) but a high resolution .png is also acceptable

☐ **Digital content for the app (Friday, October 3)**

- See intake form for details
- If content is not available by the due date, sponsor company will be responsible for profile customization

☐ **Welcome bag inserts (delivery window of Wednesday, October 8 through Friday, October 10)**

- 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:

Hyatt Regency Savannah  
Attn: Janet Terpening/NAFA Annuity Distribution Summit  
2 W. Bay Street, Savannah, GA 31401

☐ **Expo hall booth (notify NAFA by Friday, October 3)**

- Contact Janet at [janet@nafa.com](mailto:janet@nafa.com) to reserve a booth.
- A tabletop exhibit space with 6' table, two chairs, wastebasket and sign will be provided.
- Expo contact, shipping information, electricity, internet and other needs for your booth will be provided by NAFA to the key contact at the time of sponsorship commitment.
- NAFA will provide setup and tear-down instructions to the key contact at the time of sponsorship commitment.
- Use this [link](#) to order any additional tech items.

☐ **Clearly mark on the package whether your items are bag inserts, room drops or exhibitor booth giveaways.**

☐ **Include pre-paid return address labels with all shipments. If a label is not included, NAFA will assume you do not want any extra product returned.**



Name \_\_\_\_\_ Company Name \_\_\_\_\_

Company Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Email (required) \_\_\_\_\_

Alternate email to send copy of confirmation \_\_\_\_\_

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### Choose Sponsorship Level

☐ Diamond ☐ Platinum ☐ Gold ☐ Silver

### Additional Sponsorship Opportunities

☐ Keynote Sponsor

☐ Featured Speaker Sponsor

☐ After Hours Activity Sponsor

☐ Mix & Mingle Bar Sponsor

☐ Mix & Mingle Entertainment Sponsor

☐ Branded Hotel Key Card Sponsor

☐ Meeting Room Wi-Fi Sponsor

☐ Branded Conference Lanyard Sponsor

☐ Conference App Sponsor

☐ Headshot Booth Sponsor

☐ After-Hours Entertainment Sponsor

☐ Lunch Sponsor

☐ Breakfast Sponsor

☐ Branded In-Room Drops

☐ Coffee Station Sponsor

☐ Branded Charging Station Sponsor

☐ National Anthem Sponsor

☐ Future Leaders Fellowship Sponsor

☐ Women's Annuity Network Sponsor

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### 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 for the total of my sponsorship package, in addition to the 3.25% convenience fee assessed for processing the transaction.

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  
janet@nafa.com or bailey@nafa.com.**



**Hyatt Regency | Savannah, GA | October 15-16, 2025**





**NAFA**, the National Association for Fixed Annuities, is the premier trade association exclusively dedicated to fixed annuities. Our mission is to promote the awareness and understanding of fixed annuities. We educate 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 fixed annuities sold by independent agents, advisors and brokers. NAFA was founded in 1998. For more information, visit [www.nafa.com](http://www.nafa.com).