



**FLORIDA
NATIONAL ASSOCIATION OF INSURANCE
AND FINANCIAL ADVISORS – FLORIDA**

CORPORATE PARTNERSHIP PROGRAM



**NAIFA-Florida
PO Box 14365
TALLAHASSEE, FL 32317**

**Contact: Tom Ashley, CEO
O: 850.422.1701 E: tom.ashley@naifa-florida.org**

WELCOME!

Thank you for considering a Corporate Partnership with NAIFA-Florida! As the largest and most powerful professional association for financial advisors in Florida, we're excited to present this partnership opportunity to you. In the following pages, you'll find that we offer several different options for affiliating with NAIFA-Florida and our nearly 2,500 members. If your business could grow and benefit from exposure to the top financial advisors in Florida, then our Corporate Partnership Program is the place to start! We hope you'll join us, so we both can enjoy a rewarding and mutually-beneficial relationship!

WHO WE ARE

NAIFA-Florida is *the* premier professional association in the state of Florida representing insurance and financial advisors! Our nearly 2,500 members across the state are licensed and appointed advisors who use their extensive knowledge, skills and experience to provide invaluable products, guidance and service to millions of Floridians!

NAIFA-Florida consists of 18 local associations around the state. Many of the local associations conduct regular member meetings designed to provide networking, education, training, and motivation to its members. These local associations regularly work with industry providers and educators to introduce top notch products, practice enhancements and sales skills to our members.

The NAIFA-Florida staff, headquartered in Tallahassee, and the members of the NAIFA-Florida Board of Directors oversee the entire Florida operation. Throughout the year NAIFA-Florida provides advocacy, governance, and professional development support to its members.

OUR HISTORY

In July 1890, at the Parker House Hotel in Boston, a small group of agents came together in the middle of Boston's summer heat to deal with critical issues such as taxation of life insurance products and the unethical practice of rebating commissions by some insurance agents. The major outcome of that meeting was the formation of the National Association of Life Underwriters (NALU) – now NAIFA. Soon after the formation of the national association, local associations began to form around the country.

In response to the growing national association, NAIFA-Florida (as it is now known) was formed in 1932 and was administered by volunteer leaders. Stan Stone was hired in 1958 to become its first association executive and run operations from an office in Tampa. In 1973, Jim Fogarty, formerly with Florida's Department of Insurance, was hired as the association's first lobbyist to represent our members on critical issues such as product taxation, regulatory and licensing issues, national health insurance and ERISA. In 1994, former Florida legislator Herb Morgan was made CEO and lobbyist from NAIFA-Florida's new office in Tallahassee, where the headquarters continues to support the mission and goals of NAIFA-Florida.

GOLD LEVEL -- \$7,500

PACKAGE CONTAINS:

- * Full Sponsor recognition at all NAIFA-Florida events, the association's two signature events: the Annual Career Conference (summer), and the annual Legislative Day On the Hill (spring).
- * Brief promotion of your company and its products and services on the main platform of the Annual Conference and the Legislative Day on the Hill.
- * Complimentary Exhibit Booth Space at the Annual Conference and Legislative Day on the Hill.
- * Complimentary VIP seating at the exclusive President's Reception and Banquet, held at the Annual Conference. The President's Banquet honors the "Outstanding Advisor of the Year" – the association's highest award!
- * Placards with your corporate logo at all President's Banquet tables.
- * Opportunity to present and/or participate in NAIFA-Florida sponsored Educational Sessions at the Annual Conference.
- * Proprietary access to dates and times of local associations meetings.
- * Three (3) complimentary registrations to the NAIFA-Florida Annual Conference, including VIP parking.
- * One full-page color advertisement in Annual Convention Program Guide (onsite).
- * Your corporate logo featured in all Annual Conference materials distributed to attendees.
- * Two (2) NAIFA one-year memberships, providing full password-protected access to hundreds of advisor-related sales and product resources in the NAIFA website. Also, education sessions, corporate discounts, webinars, the latest news from Washington and Tallahassee regarding legislation. Membership also includes membership in one of the 19 local associations.
- * Formal press release sent to all Local Association leaders announcing your company as our Gold Corporate Partner.
- * Inclusion in the NAIFA-Florida Speakers Bureau, providing opportunities for education or product presentations to Local Associations.
- * A one-year media package to include:
 - a) Your company logo in the NAIFA-Florida e-newsletter sent monthly to all members around the state.
 - b) Your company logo on the NAIFA-Florida website, Facebook and LinkedIn social media pages.
 - c) Your company logo on all electronic broadcast messages sent to members and non-members.

SILVER LEVEL -- \$5,000

PACKAGE CONTAINS:

- * Full Sponsor recognition at all NAIFA-Florida events, the association's two signature events: the Annual Career Conference (summer), and the annual Legislative Day On the Hill (spring).
- * Brief promotion of your company and its products and services on the main platform of the Annual Conference and the Legislative Day on the Hill.
- * Complimentary Exhibit Booth Space at the Annual Conference and Legislative Day on the Hill.
- * Opportunity to present and/or participate in NAIFA-Florida sponsored Educational Sessions at the Annual Conference.
- * Proprietary access to dates and times of local associations meetings.
- * Two (2) complimentary registrations to the NAIFA-Florida Annual Conference, including VIP parking.
- * One half-page color advertisement in Annual Convention Program Guide (onsite).
- * Your corporate logo featured in all Annual Conference materials distributed to attendees.
- * One (1) NAIFA one-year memberships, providing full password-protected access to hundreds of advisor-related sales and product resources in the NAIFA website. Also, education sessions, corporate discounts, webinars, the latest news from Washington and Tallahassee regarding legislation. Membership also includes membership in one of the 19 local associations.
- * Formal press release sent to all Local Association leaders announcing your company as our Silver Corporate Partner.
- * A one-year media package to include:
 - a) Your company logo in the NAIFA-Florida e-newsletter sent monthly to all members around the state.
 - b) Your company logo on the NAIFA-Florida website, Facebook and LinkedIn social media pages.
 - c) Your company logo on all electronic broadcast messages sent to members and non-members.

Bronze LEVEL -- \$2,500

PACKAGE CONTAINS:

- * Full Sponsor recognition at all NAIFA-Florida events, the association's two signature events: the Annual Career Conference (summer), and the annual Legislative Day On the Hill (spring).
- * Complimentary Exhibit Booth Space at the Annual Conference and Legislative Day on the Hill.
- * One complimentary (1) registration to the NAIFA-Florida Annual Conference, including VIP parking.
- * One quarter-page color advertisement in the Annual Convention Program Guide (onsite).
- * Your corporate logo featured in all Annual Conference materials distributed to attendees.
- * Formal press release sent to all Local Association leaders announcing your company as our Bronze Corporate Partner.
- * A one-year media package to include:
 - a) Your company logo on the NAIFA-Florida website, Facebook and LinkedIn social media pages.
 - b) Your company logo on all electronic broadcast messages sent to members and non-members.

Financial Advisors Sales Symposium and NAIFA-Florida Annual Conference June 16-17, 2017 • Orlando



Financial Advisors Sales Symposium

Friday, June 16

- ▶ Full-day of Sales Motivation & Workshops !!!
- ▶ Top of the Table Speakers:
 - Joe Jordan, behavioral finance expert
 - Cliff Karthaus, leadership consultant
 - Bryan Hughes, top young agent
- ▶ Financial Advisor Coach Simon Reilly
- ▶ Boost your Sales \$\$\$\$
- ▶ Lunch included!!!
- ▶ For New and Seasoned Advisors Alike !!!

NAIFA-Florida Annual Conference

Saturday, June 16

- ▶ Industry Experts and Leaders!!
- ▶ How Florida's Advisors are Being Protected:
 - Tim Meenan, NAIFA-Florida Lobbyist
 - Paul Dougherty, NAIFA President
- ▶ The Latest Updates -- Issues & Industry News
- ▶ Exhibitors -- Valuable Products and Services!
- ▶ Snead/Bryan Advisor of the Year Award!
- ▶ Top Industry Awards!
- ▶ Sparkling President's Banquet



Rosen Centre Hotel, Orlando

9840 International Drive, Orlando, FL 32819-8122

Located just 15 minutes from Orlando International Airport, and just minutes away from Walt Disney World, Epcot, MGM Studios, Sea World, and Universal Studios. On International Drive, you'll be a short stroll from the nearest entertainment, restaurants, and shopping. Rosen Centre offers full resort amenities including a full-service spa, sparkling outdoor pool and two hot tubs, and eight restaurants for dining and entertainment. Also, complimentary shuttle service to Universal Orlando, Sea World, and Wet 'n Wild.

2017 Symposium/Conference Event Sponsorships

(Add-on's for:)

<u>Thursday – Association Leadership Conference (ALC)</u>	<u>Open Rate</u>	<u>Sponsors/Exhibitors</u>
* Association Leadership Conference (state & local leaders) (full day)	\$ 1,500	\$ 950
* Lunch – Association Leadership Conference	\$ 1,000	\$ 650
* Welcome Cocktail Reception with Past State Presidents	\$ 1,000	\$ 650
<u>Friday – Financial Advisors Sales Symposium</u>		
* Continental Breakfast	\$ 750	\$ 500
* Main Platform Speaker (twice) <u>Simon Rielly</u>	\$ 1,500	\$ 950
* Main Platform Speaker <u>Joe Jordan</u>	\$ 1,000	\$ 650
* Morning Refreshment Break	\$ 1,000	\$ 650
* Lunch	\$ 1,500	\$ 950
* Main Platform Speaker <u>Cliff Karthausser</u>	\$ 1,000	\$ 650
* Main Platform Speaker <u>Bryan Hughes</u>	\$ 750	\$ 500
* Breakout Sessions (4)	\$ 500 ea.	\$ 375 ea.
* Afternoon Refreshment Break	\$ 1,000	\$ 650
* Evening Reception	\$ 1,500	\$ 950
* Young Agents Team (YAT) Social	\$ 750	\$ 500
<u>Saturday – Annual Conference</u>		
* Main Platform Speaker NAIFA President <u>Paul Dougherty</u>	\$ 1,000	\$ 650
* Morning Refreshment Break	\$ 750	\$ 500
* Continuing Education Classes (4)	\$ 500 ea.	\$ 375 ea.
* Awards / LILI Graduation Luncheon	\$ 1,000	\$ 650
* Main Platform Speaker NAIFA-Florida Lobbyist <u>Tim Meenan</u>	\$ 1,000	\$ 650
* Afternoon Refreshment Break	\$ 750	\$ 500
* President's Cocktail Reception	\$ 1,000	\$ 650
* President's Banquet (Top Advisor of the Year Award)	\$ 1,500	\$ 950
* Conference Program Guide (incl. full-page, color ad. Logo on cover.)	\$ 750	\$ 500
* Name badges & lanyards	\$ 1,000	\$ 650
* Full Page Color Ad in Onsite Conference Program Guide	\$ 500	\$ 375
* ½ Page Color Ad in Onsite Conference Program Guide	\$ 425	\$ 325
* ¼ Page Color Ad in Onsite Conference Program Guide	\$ 375	\$ 275

Exhibit Booth Space

Exhibits will be open for two days -- Friday's Financial Advisors Sales Symposium and Saturday's NAIFA-Florida Annual Conference. Tabletop and/or custom booth displays systems permitted. "Pipe & drape" will be not be provided. Limited number of spaces available. See above for reduced rates for Exhibitor (add-on) sponsorships. Includes (1) full registration. (Extra registrations: \$199 ea.)

Before April 1, 2017 -- \$1,395

After April 1, 2017 -- \$1,695

Sponsorship / Exhibitor Booth Purchase

COMPANY: _____

PRIMARY CONTACT NAME: _____

PHONE: _____ FAX: _____

EMAIL: _____

MAILING ADDRESS _____

CITY, STATE, ZIP _____

1) Corporate Partnership Level

GOLD (includes Exhibit Booth) (\$7,500) \$ _____

SILVER (includes Exhibit Booth) (\$5,000) \$ _____

BRONZE (includes Exhibit Booth) (\$2,500) \$ _____

Additional Conference Sponsor Item _____ \$ _____

Additional Conference Sponsor Item _____ \$ _____

2) 2017 Symposium & Conference Exhibit Booth Space

Before April 1, 2017 (\$1,395) \$ _____

After April 1, 2017 (\$1,695) \$ _____

Additional Conference Sponsor Item _____ \$ _____

Additional Conference Sponsor Item _____ \$ _____

3) Event / Program Guide Sponsorship

Item _____ \$ _____

Item _____ \$ _____

4) Extra booth personnel (\$199. Each)

1) Name _____ 2) Name _____ \$ _____

TOTAL: \$ _____

Payment

(For online Application and Payment, visit naifa-florida.org. Click "About", then select "Corporate Partnership Program")
_____ Check (Make payable to: "NAIFA-Florida") _____ Credit card (VISA or MC)(AMEX -- contact us) ___ Invoice Me

Credit Card # _____

CVV# _____ Expiration Date: _____

Name on Credit Card _____

Billing Address: _____

City: _____ State: _____ Zip: _____

Signature: _____ Date: _____

MAIL or E-MAIL TO:

NAIFA-Florida, PO Box 14365, Tallahassee, FL, 32317 Contact: Tom Ashlev (850.422.1701) (tom.ashlev@naifa-florida.org)