



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

CORPORATE PARTNERSHIP PROGRAM (2021)



**NAIFA-Florida
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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 1,400 individual 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 1,400 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 six large local chapters and two smaller affiliates around the state. Many of the local chapters conduct regular member meetings designed to provide networking, education, training, and motivation to its members. These local chapters 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 advisors 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 advisors. The major outcome of that meeting was the formation of the National Association of Life Underwriters (NALU) – now NAIFA (National Association of Insurance and Financial Advisors). Soon after the formation of the national association, state and 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. In 2015, Tom Ashley – a former advisor (life and health, and property-casualty) was named CEO after serving as a Vice President on staff since 1994.

Sponsorship Packages

GOLD LEVEL -- \$7,500

PACKAGE CONTAINS:

- * Full Sponsor recognition at all NAIFA-Florida events, the association's two signature events: the statewide Financial Advisors Sales Symposium (summer), and the annual Legislative Day on the Hill (winter/spring) in Tallahassee.
- * Brief promotion of your company and its products and services on the main platform of the Financial Advisors Sales Symposium and the Legislative Day on the Hill.
- * Complimentary Exhibit Booth Space at the Sales Symposium and Legislative Day on the Hill.
- * Proprietary access to dates and times of local chapter meetings.
- * Three (3) complimentary registrations to the NAIFA-Florida Financial Advisors Sales Symposium.
- * One full-page color advertisement in the Program Guide at the Financial Advisors Sales Symposium.
- * Your corporate logo featured in materials distributed to attendees at the Financial Advisors Sales Symposium.
- * Two (2) NAIFA one-year memberships, providing full password-protected access to hundreds of advisor-related sales and product resources on 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 six local chapters or two local affiliates.
- * Formal press release sent to all local leaders announcing your company as a Gold Corporate Partner.
- * Announcement in NAIFA-Florida publications announcing your company as a Gold Corporate Partner.
- * A one-year media package to include:
 - a) Your company logo in the NAIFA-Florida virtual E-Journal 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 statewide Financial Advisors Sale Symposium (summer), and the annual Legislative Day on the Hill (winter/spring) in Tallahassee.
- * Brief promotion of your company and its products and services on the main platform of the Financial Advisors Sales Symposium and the Legislative Day on the Hill.
- * Complimentary Exhibit Booth Space at the Sales Symposium and Legislative Day on the Hill.
- * Proprietary access to dates and times of local chapter meetings.
- * Two (2) complimentary registrations to the NAIFA-Florida Financial Advisors Sales Symposium.
- * One half-page color advertisement in the Program Guide at the Financial Advisors Sales Symposium.
- * Your corporate logo featured in materials distributed to attendees at the Financial Advisors Sales Symposium.
- * One (1) NAIFA one-year memberships, providing full password-protected access to hundreds of advisor-related sales and product resources on 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 six local chapters or two local affiliates.
- * Formal press release sent to all Local leaders announcing your company as our Silver Corporate Partner.
- * A one-year media package to include:
 - a) Your company logo in the NAIFA-Florida virtual E-Journal 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 statewide Financial Advisors Sales Symposium (summer), and the annual Legislative Day on the Hill (winter/spring) in Tallahassee.
- * Complimentary Exhibit Booth Space at the Sales Symposium and Legislative Day on the Hill.
- * One complimentary (1) registration to the NAIFA-Florida Financial Advisors Sales Symposium.
- * One quarter-page color advertisement in the Program Guide at the Financial Advisors Sales Symposium.
- * Your corporate logo featured in materials distributed to attendees at the Financial Advisors Sales Symposium.
- * Formal press release sent to all Local 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

July 15-16, 2021

Orlando



Thursday, July 15

- ▶ Full day of Sales Ideas!!
- ▶ Motivation!!
- ▶ Workshops!!
- ▶ Boost your Income --- \$\$\$\$\$
- ▶ Exhibitors -- Valuable Products and Services!
- ▶ Lunch included!
- ▶ For New and Seasoned Advisors Alike!!
- ▶ Cocktail Reception

Friday, July 16

- ▶ Industry Experts and Leaders!!
- ▶ How Florida's Advisors are Being Protected:
 - Tim Meenan, NAIFA-Florida Lobbyist
 - NAIFA President, CEO
- ▶ The Latest Updates -- Issues & Industry News
- ▶ Exhibitors -- Valuable Products and Services!
- ▶ Continental Breakfast included!
- ▶ Top Industry Awards!



Reunion Resort, Orlando

7593 Gathering Drive, Kissimmee, FL 34747

www.reunionresort.com – 833.258.0472

Located just 30 minutes from Orlando International Airport, and only six miles from Walt Disney World. Just off I-4, Reunion Resort offers full amenities including a full-service spa, eleven sparkling outdoor pools, water park, three signature golf courses, restaurants, and on-resort shuttle service. Watch Disney fireworks each evening from the rooftop restaurant ("Eleven") and rooftop pool.

Additional Sponsorship Opportunities

	<u>Open Rate</u>	<u>Sponsors/Exhibitors</u>
<u>Thursday – Financial Advisors Sales Symposium</u>		
* Main Platform Speaker _____	\$ 995	\$ 495
* Main Platform Speaker _____	\$ 995	\$ 495
* Lunch	\$ 795	\$ 395
* Main Platform Speaker _____	\$ 995	\$ 495
* Main Platform Speaker _____	\$ 995	\$ 495
* Afternoon Refreshment Break	\$ 495	\$ 395
* Closing Cocktail Reception	\$ 995	\$ 595

Friday – Financial Advisors Sales Symposium

* Continental Breakfast	\$ 695	\$ 495
* Main Platform Speaker _____	\$ 995	\$ 495
* Morning Refreshment Break	\$ 495	\$ 395
* Continuing Education Classes (pick one of three)	\$ 395 ea.	\$ 195 ea.
* Awards Luncheon	\$ 795	\$ 395
* Main Platform Speaker NAIFA-Florida Lobbyist <u>Tim Meenan</u>	\$ 995	\$ 495

Program Guide and Name badges / Lanyards

* Conference Program Guide (incl. full-page, color ad. Logo on cover.)	\$ 695	\$ 595
* Name badges & lanyards	\$ 795	\$ 695
* Full Page Color Ad in Onsite Conference Program Guide	\$ 495	\$ 395
* ½ Page Color Ad in Onsite Conference Program Guide	\$ 395	\$ 295
* ¼ Page Color Ad in Onsite Conference Program Guide	\$ 295	\$ 195

Exhibit Booth Space (only)

Exhibit booths are included with any Gold, Silver, or Bronze sponsorship packages. Prices below are for stand-alone Exhibit booths. NOTE: Exhibit booths will be open both days of the Sales Symposium. 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 booth reps: \$199 ea.)

Before April 30, 2021	--	\$1,195
Before May 31, 2021	--	\$1,395
<u>After July 1, 2021</u>	--	\$1,595 (based on availability)

NAIFA-FLORIDA CORPORATE PARTNERSHIP / EXHIBITOR APPLICATION

COMPANY: _____

PRIMARY CONTACT NAME: _____

PHONE: _____ FAX: _____

EMAIL: _____

MAILING ADDRESS _____

CITY, STATE, ZIP _____

1) Corporate Partnership Level

GOLD (includes Exhibit Booth and 3 full registrations) (\$7,500) \$ _____

SILVER (includes Exhibit Booth and 2 full registrations) (\$5,000) \$ _____

BRONZE (includes Exhibit Booth and 1 full registration) (\$2,500) \$ _____

Additional Conference Sponsor Item (see above) _____ \$ _____

Additional Conference Sponsor Item (see above) _____ \$ _____

2) Exhibit Booth – 2021 Symposium & Conference

Before April 30, 2021 (\$1,195) \$ _____

Before May 31, 2021 (\$1,395) \$ _____

After July 1, 2021 (\$1,595) (based on availability) \$ _____

Additional Conference Sponsor Item (see above) _____ \$ _____

Additional Conference Sponsor Item (see above) _____ \$ _____

3) Additional Items (Events / Program Guide) – see above

Item (see above) _____ \$ _____

Item (see above) _____ \$ _____

4) Extra booth personnel – full Registration -- (\$199. Each)

1) Name _____ 2) Name _____ \$ _____

TOTAL: \$ _____

Payment

(For online Application and Payment, visit naifa-florida.org. Click "Get Involved", then select "Corporate Partnership Program")
_____ Check (Make payable to: "NAIFA-Florida") _____ Credit card (VISA or MC)(AMEX – thru PayPal) _____ 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 Ashley (850.422.1701) (tom.ashley@naifa-florida.org)