

MINNEAPOLIS MN | OCT 15-17, 2024

Exhibitor & Sponsor Opportunities



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TRUE WORTH



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XYPN MAKES IT POSSIBLE.

01

The Exhibitor Experience

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WANT THE FEELING?

The exhibit day is **consistently the best experience I've had as an exhibitor at any conference.** Advisors are excited and engaged, and the one-day format really helps advisors to focus on exhibitors instead of brushing by between sessions."

Scott Mackillop
FIRST ASCENT ASSET MANAGEMENT

Conference Overview

The Network

XYPN is a Network of more than 1,800 independent, fee-for-service advisors changing the face of the financial planning industry. We're not a single RIA—we created an ecosystem where fee-for-service financial advisors build successful firms, and wow, do they succeed! In our Benchmarking Study, the average XYPN member had 36% annual organic client growth in 2021, 7x more than the industry average.

700⁺
ADVISOR ATTENDEES

1000⁺
TOTAL ATTENDEES

The Network is growing and so are our horizons. Since 2016, XYPN has registered 1,380 independent, fee-for-service RIAs, representing over 12% of total state RIAs offering financial planning. With more than \$12 billion in assets under management, we represent some of the fastest-growing advisors in the industry.

The Audience

XYPN LIVE isn't serving the average advisor. Attendees are highly engaged firm owners who are eager to explore and adopt new tech, services, and solutions. Just ask a previous exhibitor.

With **solopreneurship as a goal for 50% of the Network**, outsourcing, and efficiency are top priorities. Attendees have years of business-building ahead—our average member age is 43—and they're looking for their next great partner.

→ The majority of attendees are their own COO, meaning a 0-day sales cycle with a nimble vendor review process to boot.

The Vibe

XYPN is a Network built on authenticity. Attendees know we're finding the best tech and solutions to make their autonomy possible. That's why we carefully craft the exhibit hall experience. Because driving authentic engagement for exhibitors and supporting real connections for attendees is our #1 priority.

Schedule of Events

ACCESS KEY

- **EVERYONE**
- **SPONSORS + ADVISOR ATTENDEES**
- **PLATINUM + PARTY SPONSORS + ADVISOR ATTENDEES ONLY**

TUE, OCT 15	WED, OCT 16	THU, OCT 17
Pre-Cons	Exhibit Hall	
Opening Remarks	Keynotes	
Workshops	Share Sessions	
Content Sessions	AdviceTech Comp	Content Sessions
Welcome Reception	Tech Showcase	Roundtables
	Alan + Michael Unhinged	Closing Remarks
		Keynote
	Happy Hours	Closing Party

Exhibit Hall Day

YOUR DAY TO SHOW IT OFF

What to Expect

XYPN LIVE has a unique, dedicated, one-day exhibit hall day, on **Wednesday, October 16, 2024.**

Our 700+ advisor attendees don't just grab snacks in the Exhibit Hall. Instead, they make exhibit hall a priority, setting the intention early to discover and connect with the best technology and solutions to grow and improve their businesses.

→ Simply put, the Exhibit Hall is where the conference happens on Exhibit Hall Day

They also don't blaze by the booths. As decision-making firm owners, they strategically plan their exhibit hall day, crafting checklists of the technology and services they want to explore that year. Exhibitors engage in in-depth conversations about products, features, and fit with advisors.

Traffic is so steady that exhibitors can't leave their booths, and conversations continue until close. It's a truly unique experience.

Expo Stage

To keep advisors engaged and in the Exhibit Hall space, we're bringing back the Expo Stage on Exhibit Hall Day. Both the AdviceTech competition and Tech Showcase will take place in the heart of the Exhibit Hall.

TECH SHOWCASE

Members want to know how your tech works in practice—so, we'll help you team up with a power user in the Network to highlight their favorite features, best practices, and how they use the solution to run their firm more efficiently. Want to take part in the Tech Showcase? **[Apply to exhibit today!](#)**

ADVICETECH COMPETITION

What's an XYPN conference without a little tech? The AdviceTech competition brings finalists to the stage for a seven-minute demo of their innovative solutions that support this year's theme. Past winners include Vestwell, Holistiplan, and IncomeLab to name a few. Interested in participating? Keep an eye out for the application!

Vetting Process

To ensure value for attendees and for exhibitors, we're selective of the type of companies we accept for Exhibit Hall Day, choosing only those who are most relevant to our audience. We also limit the number of companies from each category to promote a diverse mix in the Exhibit Hall.

04 What's new in 2024?

Schedule of Events

XYPN LIVE 2024 marks the 10th annual conference so to celebrate, we're doubling down on what we do best (and shaking up the schedule in the process.) Tuesday, October 15 is where it all starts, followed by the all-day Exhibit Hall on October 16. The best part? Sponsors have the opportunity to roll right into evening events with Happy Hours.

Exhibitor Evening

Platinum, Party, Blue, and Green sponsors will have the opportunity to host a happy hour, promoted by XYPN on the conference schedule, in an all-new exhibitor evening event.

Welcome Reception Access

All exhibitors are invited to kick off XYPN LIVE with attendees on October 15th at the Welcome Reception ahead of Exhibit Hall Day.

Lead Capture

We're making it easier than ever to collect attendee information without compromising attendee expectations for meaningful—not salesy—relationships. This year's conference app allows exhibitors to scan the unique QR code on attendee name badges to collect leads at the conference. Once the conference wraps, easily export your contacts to your email.

Exhibitor Content Opportunity

Have more knowledge to share? Or a topic to speak to? We've opened up the content floor to exhibitors. Within the **Exhibitor & Sponsor application**, apply to speak on the topic of your choice during Exhibit Hall Day. Selection not guaranteed.



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Brand Visibility

XYPN LIVE sponsorship makes it possible to maximize your impact.

Credibility

Members want to know how your tech works in practice and how it can help them live their best lives. The Tech Showcase offers the best of both worlds by partnering with a power user in the Network to demo how your tech makes their autonomy possible.

Brand Awareness

XYPN LIVE is promoted year-round through email and social media campaigns, with special exhibitor features for increased logo and brand visibility. Level up to a bespoke or high-visibility package with Sponsorship and À la Carte offerings to maximize your presence.

Lead Generation

Place your company in front of the 700+ fee-for-service RIA owners and advisors looking to level up financial advising with their next new partner (that's you!). The 1,000+ total industry attendees are a bonus.

Thought Leadership

You bring the expertise, we bring the audience. Place your expertise at the forefront of the best-in-class event for advisors.

Prospect and Customer Feedback

Because attendees know we're selective about the type, quantity, and category of companies that exhibit, they have high expectations, and we've been told their insight is "a product owner's dream."



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Exhibit Hall Day
10.16.2024

With a full day dedicated to the exhibit hall, there is lots of focused time to make impactful connections.

“The attendees were very engaged and interested in talking with exhibitors. XYPN members are truly focused on finding great partners and solutions.

Michael Reynolds
ZEPHYR

Exhibit at XYPN LIVE

Bridge the gap between brand presence and brand engagement by exhibiting at XYPN LIVE. As an exhibitor, you're invited to all content sessions, your logo will be featured on the XYPN LIVE website and app, and you'll tap into a Network of highly-engaged firm owners and advisors.

	Solutions	Tech & Gen	Newcomer	Consultant
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STANDARD PRICING	\$15,000	\$6,500	\$3,000	\$2,000
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Early Bird Pricing Until 12.31.23	\$12,000	\$5,200	\$2,400	\$1,600
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Exhibitor Booth Size	10X10	10X10	5X5	Table
Exhibitor Passes	2	2	2	2
Additional Pass for Confirmed Exhibitors	\$599	\$599	\$599	\$599

Solutions Exhibitors	\$15,000
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You belong to this category if your company distributes investment or insurance products through advisors to their clients.

12 AVAILABLE

Technology & General Exhibitors	\$6,500
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This is the main category if you provide technology or services to advisors. Startup technology companies or individual consultants may qualify for special pricing.

Newcomer Exhibitors	\$3,000
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This is your category if you're a start-up that launched after September 2023 or have annual revenue less than \$500k.

Consultant Exhibitors	\$2,000
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SOLD OUT

If you are an individual consultant and looking to talk to advisors? If so, join us at our smaller Consultant section in the Exhibit Hall.

07 Sponsorship Opportunities

SOLD OUT

Platinum Sponsor

SOLD OUT

STANDARD PRICING	\$30,000
Early Bird Pricing Until 12.31.23	\$25,000

Become a conversation leader at XYPN LIVE! Platinum Sponsorship provides access to the main stage and key branding opportunities.

SOLD OUT

Party Sponsor

SOLD OUT

STANDARD PRICING	\$30,000
Early Bird Pricing Until 12.31.23	\$25,000

Make a splash at XYPN LIVE 2024! The Closing Party sponsor positions their brand to maximize their impact by sponsoring our popular evening event.

Blue Sponsor

1 AVAILABLE

STANDARD PRICING	\$20,000
Early Bird Pricing Until 12.31.23	\$16,000

Have a hand in running the high-visibility essentials that make the XYPN LIVE 2024 experience possible.

Green Sponsor

2 AVAILABLE

STANDARD PRICING	\$16,000
Early Bird Pricing Until 12.31.23	\$12,000

Put your brand in the hands of attendees with high-touch amenities.

Platinum Sponsorship

SOLD
OUT

Become a conversation leader at XYPN LIVE with the conference's top-tier Platinum Sponsorship, and you'll be top-of-mind for our 1,000+ conference attendees. In addition to all the perks that come with an exhibit hall booth, you'll gain unique access to year-round promotion.

Exclusive Access

Platinum Sponsorship is **the best way to increase your brand's visibility** in the Network, including exclusive access to:

- Sponsorship of a Keynote Session on the Main Stage, which you get to introduce
- A 10x20 booth in a premier exhibit hall location of your choice
- Top-tier promotion and visibility
 - Your logo displayed at registration
 - A full-page in the Conference Guide
 - Your logo on the Guide's cover
 - A mobile app push notification to 1,000+ attendees at XYPN LIVE
- 4 Exhibitor Passes for your team
- Exclusive access to attendee-favorite Welcome Reception and Closing Party
- A 20% discount on À la Carte add ons

Plus, year-round features in promotion:

- Hyperlinked logo in all conference email communications to 1,000+ attendees
- Promotion in all Keynote communications reaching 10,000+ email subscribers
- Membership newsletter video feature reaching all 1,700+ XYPN Members

Standard Pricing

\$30,000

Early Bird Pricing
Until 12.31.23

\$25,000

09

SOLD
OUT

Party Sponsorship

Start and end the XYPN LIVE experience on the right foot by sponsoring the evening party events. 95% of XYPN LIVE attendees at this networking-focused conference cite evening events a critical source of value and reason to attend. These two events are a definite crowd-pleaser to boost your brand and are always a conference highlight in our surveys.

Exclusive Access

Party Sponsorship is **the best way to bring the fun and connect with attendees on a personal level**, and includes exclusive access to:

- High-visibility sponsorship of one of two evening events:
 - Closing Party SOLD OUT
 - Welcome Reception SOLD OUT
- A 10x20 booth in a premier exhibit hall location of your choice
- Top-tier promotion and visibility
 - Your logo displayed on the conference schedule and in the app
 - A full-page spread in the Conference Guide
 - Your logo on all party signage and promotion
 - A mobile app push notification to 1,000+ attendees at XYPN LIVE
- 4 Exhibitor Passes for your team
- Exclusive access to other evening events
- A 20% discount on À la Carte add ons

Plus, year-round features in promotion:

- Hyperlinked logo in all party promotion email communications to 1,000+ attendees
- Promotion in all social and party promotion posts reaching 10,000+ email subscribers
- Membership newsletter video feature reaching all 1,700+ XYPN Members

Standard Pricing

\$30,000

Early Bird Pricing
Until 12.31.23

\$25,000



10 Blue Sponsorship

Want to connect on a deeper level with the XYPN advisor audience? Blue sponsorships offer the opportunity to boost your brand and have a hand in running the high-visibility essentials that make the XYPN LIVE 2024 experience possible

Sponsorship of high-visibility conference essentials ensures that every attendee will have your brand to thank for powering the conference.

Amenities

This package includes the choice of one amenity and is sold on a first-come, first-serve basis.

Attendee SWAG

Get your brand in the hands of XYPN LIVE attendees by providing the main conference swag—we'll handle the rest at registration.

Solutions Spotlight Webinar SOLD OUT

Host a webinar ahead of the conference for XYPN members, gain hype and a webinar attendee list.

Wifi SOLD OUT

Help attendees get connected while gaining exposure with an interactive splash page.

Conference App SOLD OUT

Everything runs through the app. Sponsor the event tech to put your brand front and center all week.

Tech Showcase SOLD OUT

Showcase your tech alongside a power user in the Network on the stage in the Exhibit hall.

Exclusive Access

Blue Sponsorship includes exclusive access to:

- High-visibility sponsorship
- A 10x10 booth in a location of your choice
- 3 Exhibitor Passes for your team
- Top-notch logo promotion and visibility
 - Your logo displayed on the conference schedule, in the app, and in the guide
 - Your logo on all signage for sponsored item
 - A feature in a shared sponsorship blog post reaching 10,000+ subscribers
- A 15% discount on Á la Carte add ons

Standard Pricing

\$20,000

Early Bird Pricing

Until 12.31.23

\$16,000

Green Sponsorship

Want to get your brand front-and-center for every XYPN LIVE 2024 attendee? Green Exhibitor Packages allow you to put your brand in the hands of attendees with high-touch amenities.

Amenities

This package includes the choice of one amenity and is sold on a first-come, first-serve basis.

Breakfasts

Fuel community each morning with breakfast.

Final Day Lunch

Bring attendees together to wrap up the conference.

Content Day Coffee

Power up the conversation with coffee on day 1 & day 2

Exhibit Day Lunch

Want to spice up your lunch break? Sponsor it!

Hotel Key Cards

Put your brand in the hands of each attendee who stays at the Hyatt Regency.

Exhibit Day Coffee

Foster connections on Exhibit Hall day with coffee at your booth.

Lanyards

Maximize your brand visibility at the conference, and long after, with this highly-visible promotion.

Exclusive Access

Green Sponsorship includes exclusive access to:

- High-visibility sponsorship of a key amenity
- A 10x10 booth in the exhibit hall
- 3 Exhibitor Passes for your team
- Top-notch logo promotion and visibility
 - Your logo prominently displayed on the sponsored item, amenity, or event
 - A feature in a shared sponsorship blog post reaching 10,000+ subscribers
- A 10% discount on À la Carte add ons

Standard Pricing

\$16,000

Early Bird Pricing
Until 12.31.23

\$12,000



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Sponsorship Snapshot

XYPN LIVE 2024 is the best **networking event for sponsors and exhibitors to foster authentic relationships with firm owners, advisors, and experts in the financial planning industry.**

STANDARD PRICING

Early Bird Pricing
UNTIL 12.31.23

Exhibitor Booth Size
Exhibitor Passes Included
Discount on À la Carte
Additional Pass for Confirmed Exhibitors

Intro in Keynote & included in all Keynote comms

Main Stage Slot before Keynote

Logo at Event Check-In

Mobile App Push Notification

Booth location

Premier location

Choice of location

Email Campaign

Logo hyperlinked

Newsletter feature

Conference Guide

Logo on cover

Full page spread

Logo included inside

Blog Feature

Shared blog feature

Access to XYPN LIVE

To all evening events

To live sessions

Additional sponsorship**

Exclusive branding

Logo on Website

Hyperlinked

	Platinum Sold out	Party Sold out	Blue 1 Available	Green 2 Available
	\$30,000	\$30,000	\$20,000	\$16,000
	\$25,000	\$25,000	\$16,000	\$12,000
Exhibitor Booth Size	10X20	10X20	10X10	10X10
Exhibitor Passes Included	4	4	3	3
Discount on À la Carte	20%	20%	15%	10%
Additional Pass for Confirmed Exhibitors	\$599	\$599	\$599	\$599
Intro in Keynote & included in all Keynote comms	●	○	○	○
Main Stage Slot before Keynote	●	○	○	○
Logo at Event Check-In	●	○	○	○
Mobile App Push Notification	●	●	○	○
Booth location				
Premier location	●	●	○	○
Choice of location	●	●	●	○
Email Campaign				
Logo hyperlinked	●	○	○	○
Newsletter feature	●	●	○	○
Conference Guide				
Logo on cover	●	○	○	○
Full page spread	●	●	○	○
Logo included inside	●	●	●	●
Blog Feature				
Shared blog feature	●	●	●	●
Access to XYPN LIVE				
To all evening events	●	●	○	○
To live sessions	●	●	●	●
Additional sponsorship**				
Exclusive branding	○	○	●	●
Logo on Website				
Hyperlinked	●	●	●	●

* Choice of booth location excludes Platinum sponsor premier locations and is prioritized by sponsorship level.

** See next page for full options

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PROMOTE YOUR BRAND IN TWO XYPN LIVE 2024 CAMPAIGN EMAILS WITH HYPERLINK TO YOUR BRAND WEBSITE.

YOUR BRAND WILL BE INCLUDED IN ALL SCHOLARSHIP COMMS.

THE XYPN LIVE TEAM AND HOTEL WILL HAVE YOUR ITEMS DELIVERED TO ATTENDEES' HOTEL ROOMS.

XYPN WILL ANNOUNCE THE WINNER THAT EVENING ON THE MAIN STAGE DURING OUR AWARDS CEREMONY.

INCLUSION OF ONE BRANDED SIGN LOCATED BY THE FOCUS GROUP AREA.

À la Carte

Marketing Add-Ons

INCREASE VISIBILITY + PROMOTE YOUR BRAND TO ATTENDEES

Display Ads in Conference Guide	\$250-\$1,000
Interior full page	\$1,000
Interior 1/2 page	\$500
Interior 1/4 page	\$250
Banner Ads	\$1,500
Branded Clings	\$2,000
Increase visibility at XYPN LIVE 2024 with <i>one</i> branded cling placed near breakout sessions rooms.	5 AVAILABLE

Attendee Engagement Add-Ons

CONNECT WITH ATTENDEES + GENERATE BRAND EXCITEMENT

XYPN LIVE 2024 Scholarships	\$3,500
Make a positive impact on underrepresented communities by providing XYPN LIVE 2024 conference scholarships to five attendees.	
Welcome Gift in Attendee's Room	\$2,500
Boost the conference experience of attendees by having a welcome gift of your choosing delivered to their rooms. (Sponsors provide the swag).	3 AVAILABLE
Headshot Booth	\$2,000
Give attendees access to freshen up their headshots by sponsoring the professional headshot station on Exhibit Day.	1 AVAILABLE
Giveaways	\$1,000
Create a giveaway to encourage attendees to come to your booth on Exhibit Day.	3 AVAILABLE
Focus Groups	\$2,500
AVAILABLE TO XYPN PARTNERS ONLY	
XYPN will put together a focus group of member users for a partner's product team to leverage.	

Sponsor and Exhibitor FAQs

Why be an exhibitor?

At XYPN LIVE, you'll gain access to an engaged audience of firm owners and advisors looking to add solutions and services to their firm. Visibility in a Network of early-adopter tech evangelists is pretty hard to beat!

What is the format of Exhibit Hall day?

We have a one-day format where attendees take the full day to meet with exhibitors to explore areas of business in which they need support and solutions. This event also allows attendees to connect and build community.

Who attends this conference?

Our 700+ advisor attendees and 1,000+ total attendees are highly engaged financial professionals eager to learn about new solutions and connect with industry insiders.

Do you supply an attendee list?

XYPN members take their privacy very seriously and are particularly sensitive to unsolicited sales. To uphold the trust of XYPN LIVE attendees, we don't post or provide lists of XYPN LIVE attendee information. But our commitment doesn't stop you from building relationships with our attendee audience.

Following up with leads just got a whole lot easier. We're bringing back 2023's lead capture through the conference app. Once the conference wraps, easily export your new contacts to your email.



10 Years of Seeing What's Possible

Your Business. Your Way.

MINNEAPOLIS, MN | OCT 15-17, 2024

Ready to make an impact?

Support advisors' independence
by becoming an exhibitor or sponsor

[SUBMIT YOUR EXHIBITOR & SPONSOR APPLICATION](#)



About XYPN

XYPN is the leading network for fee-for-service financial advisors who want to serve next generation clients by providing comprehensive financial planning services for a monthly subscription fee and without product sales or asset minimums. The Network offers a community for new and established financial advisors who want to serve the next generation. XYPN supports its members by providing compliance support, business tools and templates, and a wide range of technology solutions.

Contact us at events@xyplanningnetwork.com