

SAN DIEGO, CA | SEP 29-OCT 1, 2026

Exhibitor & Sponsor Opportunities

Connect beach-side with the advisors shaping the industry.

[Submit your application →](#)

[Contact us →](#)

The XYPN LIVE Difference

SEPTEMBER 30, 2026
Exhibit Hall Day

Our unique one-day, all-in format puts your solutions at the center of the conference, guaranteeing steady, high-quality traffic and nonstop conversations.

One full day—no competing sessions, just pure exhibitor focus.

Advisors don't just pass by—they spend the entire day engaging with exhibitors and the expo stage. Expect to spend **8+ hours speaking with firm owners non-stop**.

It's the lowest-cost, highest-value exhibitor experience in the industry because the entire day is all about you.

Access The Network

XYPN is where the fastest-growing independent advisors come together. With more than \$80 billion in AUM, our Network of 2,100+ fee-for-service advisors is shaping the future of financial planning. XYPN isn't a single RIA—we've built an **ecosystem where independent advisors thrive, grow, and succeed**, making our community a powerful audience for your solutions.

The Audience

For exhibitors, that means direct access to advisors who come to XYPN LIVE specifically to find business-building solutions. The Exhibit Hall is where they go to discover who's solving what—creating impact that extends well beyond the conference.

XYPN is where the fastest-growing independent advisors come together

XYPN LIVE is the conference designed to bring together the industry's most engaged firm owners. The majority of attendees are their own CEO and COO, meaning a 0-day sales cycle with a nimble vendor review process is the norm.

The Vetting Process

At XYPN LIVE, we curate exhibitors to connect you with advisors actively seeking long-term partners. By limiting the number of companies in each category, you'll stand out, have more meaningful conversations, and enjoy a diverse, highly engaged Exhibit Hall.

650+
ADVISOR ATTENDEES

70%
OF ATTENDEES ARE
XYPN MEMBERS

800+
TOTAL ATTENDEES

20%
GROWTH RATE FOR XYPN
MEMBER FIRMS IN 2023



Speaking Slot | Exhibit Hall Day
EXHIBITOR OPPORTUNITY

Exhibitor Schedule

From start to finish, September 30th is the day we turn the spotlight from Network to exhibitor experts.

TUESDAY, SEP 29	* EXHIBIT HALL DAY WEDNESDAY, SEP 30	THURSDAY, OCT 1
8:00 AM- 7:00 PM PT Travel to San Diego	9:45 AM - 5:00 AM PT Exhibit Hall Day Exhibitor Content Sessions Expo Stage Events Keynotes Tech Showcase AdviceTech Competition Exhibit Hall Lunch	8:00 AM- 5:00 PM PT Keynotes Content Sessions Closing Party
3:00 PM - 7:00 PM PT Exhibitor Move-In Opening Remarks Welcome Reception*	5:30 PM - 9:30 PM PT Exhibitor Move-Out	* For a small fee, exhibitors can attend the Welcome Reception. ** Hosted by Platinum, Power, Party, Wifi, Blue, and Green Sponsors, accessible by all attendees *** The Closing Party is a private event reserved for our top Platinum, Power, and Party sponsors.
	7:30 PM - 9:30 PM PT Exhibitor Happy Hours Hosted by Sponsors**	



10x10 Exhibit Hall Booth | Includes 6' table with black table linen + 2 chairs

The Exhibitor Experience



DEDICATED DAY

Designed so there’s no competition between your booth and conference events—the entire day is dedicated to the Exhibit Hall.



EXPO STAGE EVENTS

Exhibit Hall Day features the AdviceTech Competition and Tech Showcase, drawing WealthTech media and industry leaders in.



EVENING EVENTS

All exhibitors are invited to connect with attendees at the Welcome Reception* and can join Sponsor-hosted happy hours.



ACCESS

Connect with attendees during content sessions, main stage events, and over meals. Breakfast & lunch are provided on Exhibit hall day.



CONFERENCE APP

Released ahead of the conference, you’ll get access to pose questions and engage with advisor attendees.



BRAND VISIBILITY

Exhibitor logos are featured on the website and on-site materials. Sponsors get more with high visibility ads, blogs, and more.



PRIMED AUDIENCE

Thanks to XYPN’s vetting process, the exhibit hall is *the* place for members to find their next partner.



LEAD CAPTURE

Turn conversations into customers with built-in, complimentary lead capture in the conference app.



NETWORKING

Meet engaged financial planners, team XYPN, and aligned companies across 12+ hours of in-person networking opportunities

* For a small fee, exhibitors can attend the Welcome Reception. The Closing Party is a private event reserved for our top Platinum, Power, and Party sponsors.

PICK YOUR EXPERIENCE

Two Paths to Impact

Sponsor

Platinum

3 available

EARLY BIRD PRICING	\$32,000
Ends 12.31.25	
Standard Pricing	\$35,000
Exhibitor Booth Size	10x20
Exhibitor Passes	4
Discount on Á la Carte	20%
Additional Exhibitor Passes	\$799

Become a conversation leader with access to main stage and branding opportunities.

Power

2 available

EARLY BIRD PRICING	\$28,000
Ends 12.31.25	
Standard Pricing	\$30,000
Exhibitor Booth Size	10x20
Exhibitor Passes	4
Discount on Á la Carte	20%
Additional Exhibitor Passes	\$799

Power sponsorship puts your brand front-and-center in a content session.

Party

2 available

EARLY BIRD PRICING	\$26,000
Ends 12.31.25	
Standard Pricing	\$28,000
Exhibitor Booth Size	10x20
Exhibitor Passes	4
Discount on Á la Carte	20%
Additional Exhibitor Passes	\$799

Position your brand in the heart of attendee favorite evening receptions.

Wifi

1 available

EARLY BIRD PRICING	\$22,000
Ends 12.31.25	
Standard Pricing	\$25,000
Exhibitor Booth Size	10x10
Exhibitor Passes	4
Additional Exhibitor Passes	\$799

Get the whole conference connecting with high-visibility wifi.

Blue

2 available

EARLY BIRD PRICING	\$19,000
Ends 12.31.25	
Standard Pricing	\$23,000
Exhibitor Booth Size	10x10
Exhibitor Passes	3
Discount on Á la Carte	15%
Additional Exhibitor Passes	\$799

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

Green

6 available

EARLY BIRD PRICING	\$15,000
Ends 12.31.25	
Standard Pricing	\$18,000
Exhibitor Booth Size	10x10
Exhibitor Passes	3
Discount on Á la Carte	10%
Additional Exhibitor Passes	\$799

Showcase your brand to attendees through personalized, high-impact amenities.

Exhibit

Solutions

20 available

EARLY BIRD PRICING	\$14,000
Ends 12.31.25	
Standard Pricing	\$16,000
Exhibitor Booth Size	10x10
Exhibitor Passes	2
Additional Exhibitor Passes	\$799

You belong to this category if end-clients pay your fee, or you are a broker of end-client solutions.

Tech & General

EARLY BIRD PRICING	\$6,000
Ends 12.31.25	
Standard Pricing	\$7,500
Exhibitor Booth Size	10x10
Exhibitor Passes	2
Additional Exhibitor Passes	\$799

This is the main category if you provide technology or services to advisors.

Newcomer

20 available

EARLY BIRD PRICING	\$3,000
Ends 12.31.25	
Standard Pricing	\$4,000
Exhibitor Booth Size	6 x 6
Exhibitor Passes	2
Additional Exhibitor Passes	\$799

This is your category if you're a start-up that launched after October 2025 or have annual revenue less than \$500k.

Consultant

5 available

STANDARD PRICING	\$2,000
Exhibitor Booth Size	6' Table
Exhibitor Passes	2
Additional Exhibitor Passes	\$799

Are you a small consulting firm looking to talk to advisors? If so, join us at our Consultant section in the Exhibit Hall.



À la Carte Add-Ons

No matter how you choose to make an impact at LIVE, add-ons are available. Choose add-ons that amplify your booth, your brand, and your impact. ↘



TECH SHOWCASE SLOT

All new in 2026! Tech Showcase slots are limited and curated by Team XYPN.

\$4,000
4 AVAILABLE



CONFERENCE GUIDE DISPLAY AD

Put your brand in the on-site guide for attendees.

Interior full page	\$1,000
Interior 1/2 page	\$500
Interior 1/4 page	\$250



EMAIL BANNER AD

Feature your brand in two XYPN LIVE campaign emails to 10,000+ recipients with hyperlink to your brand's website.

\$1,000



BRANDED CLINGS

Want your company in the action? Add-on a branded window/wall cling to have your brand featured near content session rooms.

\$1,000



ON-SITE SWAG

Have your brand's swag delivered to 650+ conference attendee's rooms. You provide the swag, XYPN will provide logistics.

\$2,500



HEADSHOT BOOTH

Sponsor the professional headshot station on Exhibit Day to boost traffic near your booth.

\$2,000



GIVEAWAYS

Create a giveaway for your booth on Exhibit Day. XYPN will announce winners from the main stage.

\$1,000
3 AVAILABLE



FOCUS GROUPS

XYPN will put together a focus group of member users for a your product team to learn from.

Available to XYPN partners only
\$1,500

Sponsorship Amenities

	Platinum 3 Available	Power 2 Available	Party 2 Available	Wifi 1 Available	Blue 2 Available	Green 6 Available
Exhibitor Booth Size	10x20	10x20	10x20	10x10	10x10	10x10
Exhibitor Passes Included	4	4	4	3	3	3
Discount on Á la Carte	20%	20%	20%	15%	15%	10%
Exclusive Sponsorship						
Exclusive Keynote Sponsorship	✓					
60-min Content Session on Sep 30		✓				
Branded Evening Reception			✓			
Wifi Sponsorship				✓		
Exclusive sponsorship opportunity					✓	✓
Lead-Up Visibility						
Logo in email campaign	✓	✓	✓			
XYPN LIVE attendee email feature	✓	✓	✓			
XYPN member newsletter feature	✓	✓	✓			
Social media feature	3	2	1			
Shared blog feature	✓	✓	✓	✓	✓	✓
Logo on XYPN LIVE website	✓	✓	✓	✓	✓	✓
Rolling ad in post-event recording		✓				
On-Site Visibility						
Premier booth location	✓	✓	✓			
Event signage with logo	3	2	2	2-3	1-2	1-2
Conference guide logo placement	Cover + Inside	Back + Inside	Inside	Inside	Inside	Inside
Conference guide ad	Full Page	Full Page	Full Page	Half Page	Half Page	Half Page
Conference app feature	✓	✓	✓			Item dependent
Conference app push notification	✓	✓	✓	✓	✓	Item dependent
Event Access						
Attend Closing Party	✓	✓	✓			
Host an exhibitor happy hour	✓	✓	✓	✓	✓	✓
Standard Pricing	\$35,000	\$30,000	\$28,000	\$25,000	\$23,000	\$18,000
Early Bird Pricing ENDS 12.31.25	\$32,000	\$28,000	\$26,000	\$22,000	\$19,000	\$15,000



Keynote Sponsorship | Introduce keynote with a 5 minute speaking slot
PLATINUM SPONSOR OPPORTUNITY



Premium Booth Location
PLATINUM, POWER, & PARTY SPONSOR OPPORTUNITY



Lanyards | XYPN LIVE registration
GREEN SPONSOR OPPORTUNITY



Exhibitor Happy Hour | Host a Happy Hour, promoted by XYPN, during the dedicated exhibitor evening.
SPONSOR OPPORTUNITY

EXHIBIT HALL DAY

Expo Stage

Our expo stage is where solutions like Holistiplan, Altruist, and Snappy Kraken first made their debut.

This is where two of the most anticipated events of XYPN LIVE happen: the AdviceTech Competition and the Tech Showcase. This is where forward-thinking advisors choose the tech of tomorrow.



Expo Stage Events

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.

It’s also invite-only. So, how can you guarantee your spot on stage with a power user in the Network? Simple. **The Blue Sponsorship positions you as the Expo Stage sponsor** and guarantees you a spot in the Tech Showcase. That’s a 20-minute speaking opportunity that puts your brand front and center of the 650+ attendees looking for their next great partner.

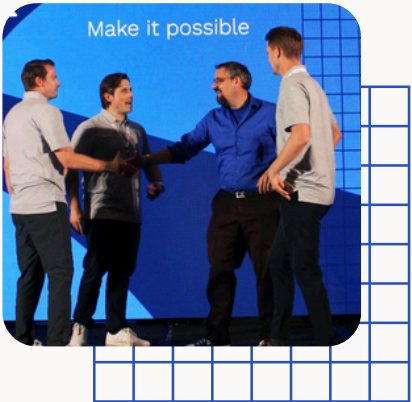
ADVICETECH COMPETITION

What’s an XYPN conference without tech innovation? The AdviceTech competition brings finalists to the stage for a seven-minute demo of their innovative solutions that have never been seen before. Past winners include Snappy Kraken, Holistiplan, and IncomeLab, to name a few.

Interested in participating? Keep an eye out for the application coming in early 2026!

“The year after [we won the AdviceTech Competition], we tripled our business. We had a storm of XYPN members coming to us afterward and have seen very strong growth since.”

Johnny Poulsen | **Income lab**
2023 ADVICETECH COMPETITION WINNER



Sponsor the Stage

Available only within Blue Sponsorship, the Expo Stage sponsor doesn’t just join the action—you own it. **Your company becomes the anchor of the space.**

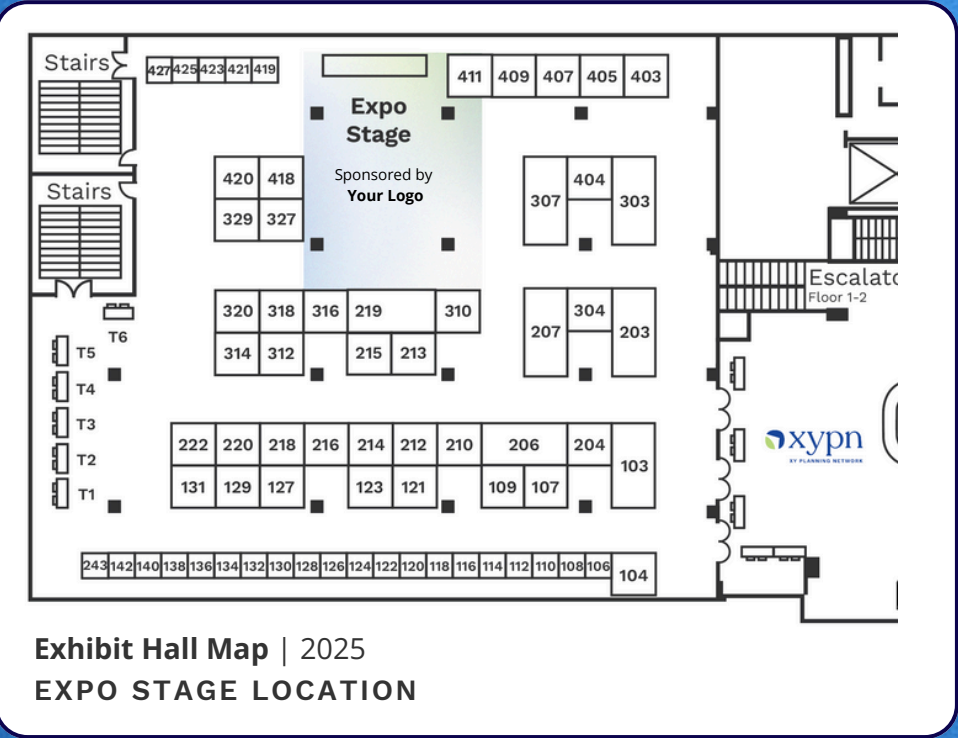
Your logo, message, and presence are front and center at every demo, and you’ll have the opportunity to welcome advisors from the stage or close out the day. It’s a chance to demo your solution live, side by side with other innovators, and drive immediate momentum that carries directly into your booth.

Blue Sponsorship

EARLY BIRD PRICING	\$19,000
Ends 12.31.25	
Standard Pricing	\$23,000
Exhibitor Booth Size	10x10
Exhibitor Passes	3
Discount on À la Carte	15%
Additional Exhibitor Passes	\$799

THE EXPO STAGE INCLUDES:

- 15-minute live demo in the Tech Showcase
- 5–10 minute message from the stage
- Featured placement in Expo Stage communications: app, agenda, signage, printed materials
- 2 dedicated signs
- Logo inside Conference Guide
- Half page ad in Conference Guide
- Shared Blog feature
- Opportunity to host an Exhibitor Happy Hour



3 AVAILABLE

Platinum Sponsorship

Platinum is the headliner sponsorship at XYPN LIVE—the highest level of visibility available. This is your opportunity to be recognized as a leading voice in fee-only financial planning while gaining unmatched exposure across the event.



MAIN STAGE

Platinum sponsors enjoy a dedicated 5-minute speaking slot on the main stage before introducing the Keynote—keynotes are the highest-attended sessions of LIVE.

EMAIL FEATURE

Get your brand featured in the XYPN LIVE email campaign and shared blog for the lead-up. You'll also be featured in membership newsletters reaching 2,100+ members. On-site, you'll be recognized in a mobile app push notification reaching all attendees.



TOP-TIER VISIBILITY

Platinum sponsors touch every part of LIVE with three dedicated signs, a full page spread (and logo on the cover) in the conference guide.



RECEPTION ACCESS

Exclusive access to attended the Welcome Reception and Closing Party. Platinum sponsors can also host optional Happy Hours on the dedicated exhibitor evening.



PREMIER LOCATION

Platinum sponsors enjoy a 10x20 booth to connect with attendees at the front of the exhibit hall so you don't miss an opportunity.

SOCIAL MEDIA FEATURE

Platinum sponsors receive 3 social media features from XYPN's social media accounts, reaching 15,000+ followers.

SHARED BLOG

Platinum sponsors will be featured in a shared blog on XYPN's Advisor Blog.

À LA CARTE DISCOUNT

Turn up the exposure by enjoying 20% off of À la Carte add-ons.

EARLY BIRD PRICING

Ends 12.31.25

\$32,000

Standard Pricing	\$35,000
Premium Location Exhibitor Booth	10x20
Exhibitor Passes	4
Discount on À la Carte items (page 5)	20%
Social Media Feature from XYPN	3
Additional Exhibitor Passes	\$799

Submit your application →

2 AVAILABLE

Power Sponsorship

Power Sponsors are more than exhibitors—they’re partners who help shape the content and conversations at XYPN LIVE. As a Power Sponsor, your brand becomes part of the programming on Exhibit Hall Day.

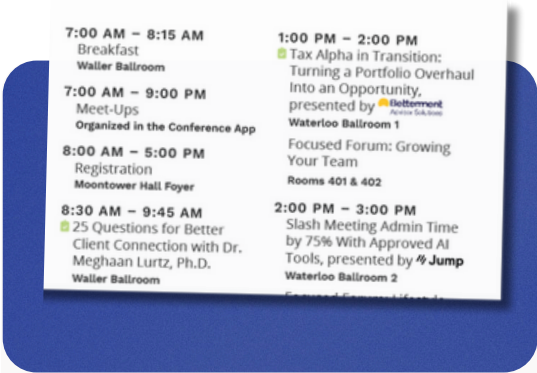
EARLY BIRD PRICING Ends 12.31.25	\$28,000
Standard Pricing	\$30,000
Premium Location Exhibitor Booth	10x20
Exhibitor Passes	4
Discount on À la Carte items (page 5)	20%
Social Media Features from XYPN	2
Additional Exhibitor Passes	\$799

Submit your application →



CONTENT SESSION

Your featured 60-minute Exhibit Hall Day content session is an opportunity to tie your brand to the topics that matter most to advisors.



SESSION PROMOTION

Power sessions are featured in the conference guide with your logo along with two dedicated signs showcasing your sponsorship.



RECEPTION ACCESS

Exclusive access to attended the Welcome Reception and Closing Party. Platinum sponsors can also host optional Happy Hours on the dedicated exhibitor evening.

SOCIAL + EMAIL RECOGNITION

Power sponsors are featured in an exclusive conference email as well as membership newsletters reaching 2,100+ members. Your sponsorship will also be featured 2x in XYPN’s social media and featured in a shared blog.

On-site, you’ll be recognized in a conference app push notification for all attendees.



PRINTED MATERIALS

Power sponsors have access to a full page in the conference guide, available to all attendees, in addition to your logo & sponsorship inside.

2 AVAILABLE

Party Sponsorship

Evening events are where relationships deepen and the Network comes to life. With 95% of attendees citing them as a critical source of value—and one of the top reasons they attend—Party sponsors position their brand as the most memorable networking experience.



WELCOME RECEPTION

Put your brand at the center of the first big networking moment of XYPN LIVE—where 800+ attendees kick off the week and make their first connections.

CLOSING PARTY

End the conference with your logo on the last—and most memorable—celebration, leaving advisors with your brand top of mind as they head home.



All Party Sponsors have access to:

RECEPTION HOST

Exclusive access to host the Welcome Reception or Closing Party and invitation to host optional Exhibit Hall Day Happy Hours.

ON-SITE VISIBILITY

Power sessions have a full page spread and schedule feature (with logo) in the conference guide, shoutout on the main stage, and 2 dedicated event signs.

EMAIL FEATURE

Power sessions have a full page spread and schedule feature (with logo) in the conference guide, shoutout on the main stage, and 2 dedicated event signs.

SHARED BLOG

Party sponsors will be featured in a shared blog on XYPN’s Advisor Blog.

EARLY BIRD PRICING Ends 12.31.25	\$26,000
Standard Pricing	\$30,000
Premium Location Exhibitor Booth	10x20
Exhibitor Passes	4
Discount on À la Carte items (page 5)	20%
Social Media Feature from XYPN	1
Additional Exhibitor Passes	\$799

[Submit your application →](#)

1 AVAILABLE

Wifi Sponsorship

Keep advisors connected while keeping your brand front and center. Wifi sponsorship provides the most in-demand utility of the conference—fast, reliable internet—and gets visibility every time an attendee connects.

LIVE’s Connectivity Partner

Venue-wide signage directs attendees to log in, ensuring your company is top of mind in every corner of the conference. Wifi sponsorship delivers constant, repeated impressions that advisors can’t miss—firmly linking your brand with the conference’s most essential service.



Wifi Sponsor at Registration
EXCLUSIVE WIFI SPONSOR OPPORTUNITY

SHARED BLOG

Wifi sponsors will be featured in a shared blog on XYPN’s Advisor Blog.

HAPPY HOUR ACCESS

Wifi sponsors can host optional Happy Hours on the dedicated exhibitor evening.

HALF PAGE AD

Put your brand in the hands of attendees in the Conference Guide.

All Party Sponsors have access to:

CUSTOM NETWORK BRANDING

Your brand name featured in the Wi-Fi SSID (network name), within a memorable, on-brand password, and on a custom splash screen.

CONFERENCE APP FEATURE

Wifi sponsors are recognized in a dedicated push notification to all attendees. You’ll also gain access to a branded banner in the app.

HIGH-POWERED VISIBILITY

Your logo will be featured on all wifi signage, including at registration, near session rooms, and in the exhibit hall in addition to printed items.

STAGE RECOGNITION

Make it on main stage. Team XYPN will recognize your sponsorship at the top of Keynotes & in content sessions.

EARLY BIRD PRICING \$22,000
Ends 12.31.25

Standard Pricing	\$25,000
Exhibitor Booth	10x10
Exhibitor Passes	4
Discount on Á la Carte items (page 5)	15%
Additional Exhibitor Passes	\$799

[Submit your application →](#)

2 AVAILABLE

Blue Sponsorship

Blue Sponsors are woven into the daily experience—attendees will associate your brand with the very elements that make it possible to connect with the people and companies that matter most.

SHARED BLOG

Blue sponsors will be featured in a shared blog on XYPN’s Advisor Blog.

HAPPY HOUR ACCESS

Blue sponsors can host optional Happy Hours on the dedicated exhibitor evening.

HALF PAGE AD

Put your brand in the hands of attendees in the Conference Guide.



Conference app connects attendees | Conference App Sponsor
BLUE SPONSOR OPPORTUNITY

EARLY BIRD PRICING **\$19,000**
Ends 12.31.25

Standard Pricing	\$23,000
Exhibitor Booth	10x10
Exhibitor Passes	3
Discount on Á la Carte	15%
Additional Exhibitor Passes	\$799

[Submit your application →](#)



EXPO STAGE

1 available

Best if your goal is direct exposure and positioning as an innovator. The expo stage sponsor becomes the anchor of the space. Welcome attendees and host a 15-minute demo from the stage on-stage.

CONFERENCE APP

1 available

Best if your goal is sustained, repeated impressions. Every attendee uses the app daily for schedules, scan leads, and get updates—meaning your brand is consistently in their hands before, during, and long after the event.



6 AVAILABLE

Green Sponsorship

Green Sponsorships tie your company to the high-touch essentials that attendees reach for all day—from hotel keycards and lanyards to coffee breaks and lunches.

SHARED BLOG

Green sponsors will be featured in a shared blog on XYPN’s Advisor Blog.

HAPPY HOUR ACCESS

Green sponsors can host optional Happy Hours on the dedicated exhibitor evening.

HALF PAGE AD

Put your brand in the hands of attendees in the Conference Guide.



Lanyard, Coffee, and Lunch Sponsor
GREEN SPONSOR OPPORTUNITIES

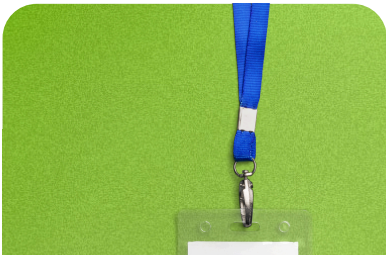
EARLY BIRD PRICING Ends 12.31.25	\$15,000
Standard Pricing	\$18,000
Exhibitor Booth	10x10
Exhibitor Passes	3
Discount on Á la Carte	10%
Additional Exhibitor Passes	\$799

[Submit your application →](#)



HOTEL KEY CARDS

Open doors for all attendees staying on-site.



LANYARDS

Your brand in every conference photo snapped.



EXHIBIT HALL COFFEE

Spice up the exhibit hall with coffee at your booth.



EXHIBIT HALL LUNCH

Fuel community and keep those leads growing.



CONTENT DAY COFFEE

Power up the conversations on day 1 & day 3



CONTENT DAY LUNCH

Bring attendees together to break between sessions.

Frequently Asked Questions

WHO ATTENDS THIS CONFERENCE?

Our 650+ advisor attendees and 800+ 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 LIVE attendees value their privacy and prefer meaningful, relationship-driven interactions over unsolicited sales. That's why we dedicate one whole day to Exhibit Hall day: so exhibitors have the time to make real connections.

To uphold that trust, we don't post or provide lists of attendee information. But our conference app includes a complimentary lead capture tool. During the conference, scan the unique QR codes on attendee name badges to collect contact information. Once the conference wraps, easily export your new contacts to your email.

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.

WHEN IS THE DEADLINE TO APPLY?

Physical booths come on a first-come, first-serve basis. To be featured in the XYPN LIVE conference guide handed to attendees at registration, and other printed materials, your application must be received by August 15, 2026.

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Exhibit & Sponsor

Experience authentic attendee engagement—plus the freedom add-on to maximize visibility.

[Submit your application →](#)

[Contact us →](#)