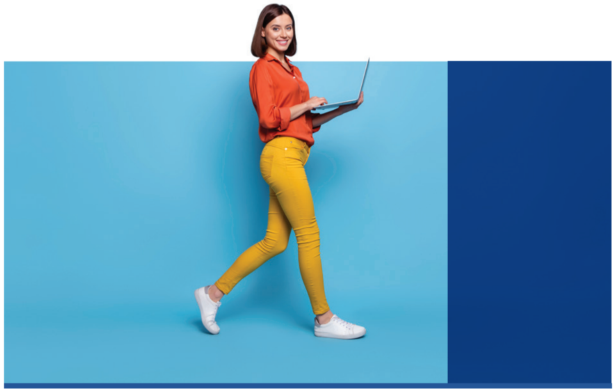
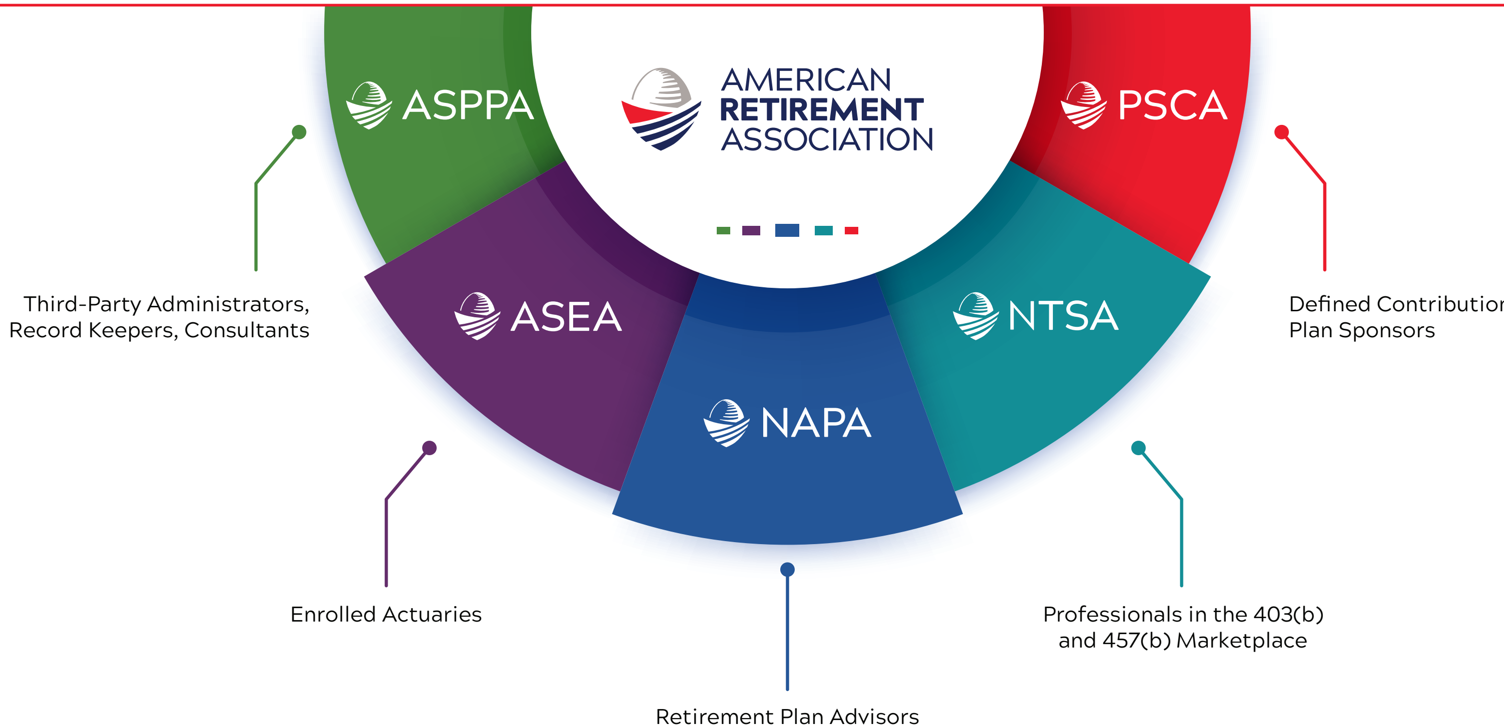
FIRM PARTNER BENEFITS
DCIOs, Recordkeepers, & Service Providers
2024




AMERICAN RETIREMENT ASSOCIATION
ASPPA
PSCA
ASEA
NTSA
NAPA
Third-Party Administrators, Record Keepers, Consultants
Defined Contribution Plan Sponsors
Enrolled Actuaries
Professionals in the 403(b) and 457(b) Marketplace
Retirement Plan Advisors

The National Association of Plan Advisors (NAPA) was created by and for retirement plan advisors.

Our purpose is to create a framework of policy that gives every working American the ability to have a comfortable retirement.

NAPA is the only advocacy group exclusively focused on the issues that matter most to advisors who work in the retirement plan industry.

If you're looking to work with advisors, we're the organization to do it with!

325+

Firm Partner Members

19k+

Individual Members

ADVOCACY

AMERICAN RETIREMENT ASSOCIATION
Political Action Committee

ARA PAC is our voice on Capitol Hill. Your Firm Partner dues ensure NAPA's ideas and philosophies are heard, and that the private retirement plan industry is protected by advocating for public policy to expand and enhance access to retirement plans.

AMERICAN RETIREMENT ASSOCIATION
Government Affairs Committee

Your members have the opportunity to work directly with NAPA's Government Affairs Committee (GAC). GAC represents NAPA in communications with the United States Executive Branch, Congress, and government agencies in shaping the retirement industry and protecting our members. We work tirelessly to help businesses of all types implement retirement plans and make it easier for Americans to save for a secure retirement.

NAPA D.C. FLY-IN FORUM

NAPA Firm Partners have the exclusive opportunity to sponsor NAPA's annual Fly-In Forum, where the top retirement plan advisors in the country represent their plan clients and explain to lawmakers the industry's core contributions to American workers' efforts to save for retirement.

PROFESSIONAL DEVELOPMENT CREDENTIALS

Our DCIO, Recordkeeper and Service Provider Firm Partners have a unique opportunity to co-brand the program for distribution to advisor customers.

NAPA Certified Plan Fiduciary Advisor Credential
The Certified Plan Fiduciary Advisor (CPFA®) Credential demonstrates your knowledge, expertise, and commitment to working with retirement plans. Plan advisors who earn their CPFA® demonstrate the expertise required to act as a plan fiduciary or help plan fiduciaries manage their roles and responsibilities.

NAPA Nonqualified Plan Advisor Credential
The Nonqualified Plan Advisor Credential showcases an advisor's proficiency, knowledge, and dedication in the field of nonqualified deferred compensation and nonqualified executive compensation plans. By attaining the NQPA™ Credential, advisors demonstrate their expertise in advising employers on the intricacies of nonqualified plan design and financing.

NAPA 401(k) Rollover Specialist (k)RS™ Credential
The 401(k) Rollover Specialist (k)RS™ Credential demonstrates an advisor's knowledge, expertise, and commitment to assisting clients with rollovers. Wealth management and retirement plan advisors who earn the (k)RS™ credential prove the knowledge required to comply with new regulations for recommending rollovers to individual retirement accounts (IRAs), from one plan to another plan, and from one IRA to another IRA.

NAPA Qualified 401(k) Specialist Credential
New in 2024! Equip your client-facing professionals with NAPA's Qualified 401(k) Specialist Credential. Designed for those in sales and client relationship roles, it enhances their understanding of retirement plans, allowing them to identify opportunities, anticipate potential issues, and engage clients efficiently and ethically. Boost their confidence and effectiveness in driving sales and offering solutions without delving into the depths of compliance intricacies. Bulk discounts are available for Firm Partners.

PROFESSIONAL DEVELOPMENT CERTIFICATES & WEBCASTS

Our DCIO, Recordkeeper and Service Provider Firm Partners have a unique opportunity to co-brand the program for distribution to advisor customers.

NAPA 401(k) Practice Builder Certificate
Designed by our BD and RIA Firm Partners, NAPA's 401(k) Practice Builder sales training program was created for the emerging plan advisor. The program is self-paced, takes less than three hours to complete, and is approved for CFP® credit. Our DCIO, Recordkeeper and Service Provider Firm Partners have a unique opportunity to co-brand the program for distribution to advisor customers.

NAPA 401(k) Retirement Income for 401(k) Plans Certificate
New in 2024! NAPA's Retirement Income for 401(k) Plans or RI(k)™ Certificate course, will help advisors understand the key terminology needed to communicate with plan sponsors and participants related to retirement income. Plan advisors will become familiar with the retirement income solutions that are available and learn how to implement them following a prudent process with plan sponsors and participants.

NAPA ESG Investing for 401(k) Advisors Certificate
NAPA's ESG Investing for 401(k) Advisors was created to help advisors gain fluency in ESG principles, strategies, and screening. Advisors gain insight on common questions and concerns, what questions to ask in assessing ESG investment, and learn how to talk about the benefits and risks of ESG investments for retirement plans.

NAPA Introduction to Retirement Plans Certificate
Designed by ASPPA and adapted for the NAPA audience, the Introduction to Retirement Plans (IRP) certificate course is designed for employees with no retirement industry experience. This course provides important foundational knowledge, concepts, and language to help all new employees get oriented during their onboarding process. Firm Partners receive a discounted rate of $360. Bulk Discounts are available.

NAPA Webcasts
Complimentary periodic, educational webcasts are provided to NAPA advisor members. Our DCIO, Recordkeeper and Service Provider Firm Partners can sponsor these webcasts for a fee.

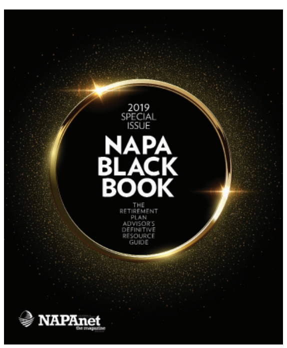
BUSINESS INTELLIGENCE

NAPA Net Daily

Your NAPA members receive a daily e-newsletter in their inbox each morning. A member favorite, NAPA Net Daily is designed to provide need-to-know industry information in a quick-read format. Firm Partners can share timely announcements in the Partner Corner of NAPA Net Daily. Banner advertising and sponsored content are available for an additional fee.

NAPA Net the Magazine

Your NAPA members receive a free subscription to NAPA Net the Magazine, the official quarterly print magazine of the National Association of Plan Advisors, featuring a mix of in-depth articles and columns by prominent thought leaders. Discounted pricing for Firm Partners on advertising and thought leadership Executive Interviews.



NAPA Black Book

An Advisor's Insider's Guide to the Industry's Top Broker-Dealers, Recordkeepers, DCIO Firms, TPAs, Tools & Tech, Aggregators, Financial Wellness & more. Firm Partners receive a complimentary half page listing in this coveted publication. Enhanced listings are available for an additional fee.

NAPA Podcasts

When words alone just won't do, NAPA's podcast brings members timely insights from the retirement industry's leading voices on the most compelling topics. For a separate fee Firm Partners have the opportunity to sponsor ARA podcasts with high profile industry experts or to create your own podcasts on topics of interest to NAPA members.

CONTENT MARKETING

For an additional fee, NAPA Firm Partners can share your thought leadership content with the nation's largest and most engaged retirement advisor audience.

NAPA Firm Partners may leverage the following:

Featured News and Content: NAPA Firm Partners can have their content highlighted as the "Featured Content" of the day on the NAPA-Net Daily up to 20 times during the contracted period, linking readers to thought leadership articles on your website.

White Paper: NAPA Firm Partners have the opportunity to post a text-link message on the NAPA-Net Daily up to 10 times during the contracted period as a "featured" white paper.

Print Thought Leadership Exposure: NAPA-Net the Magazine has a section devoted to featured articles contributed by Content Contributor Partners, with a link to your website where the content is hosted.

Executive Interview: NAPA will provide a freelance editor to write a full-page, sponsored, executive interview.

Please see NAPA-Net Media kit for specifications and cost.

BUSINESS DEVELOPMENT & NETWORKING EVENTS

Our DCIO, Recordkeeper and Service Provider Firm Partners have the opportunity to sponsor NAPA's variety of conferences throughout the year.

NAPA 401(k) SUMMIT THE ADVISOR EXPERIENCE

April 7-9, 2024 | Nashville, TN

The NAPA 401(k) Summit is the nation's largest and most prestigious conference for retirement plan advisors, and the only industry convention that delivers actionable, unbiased content designed by advisors, for advisors. Our DCIO, Recordkeeper and Service Provider Firm Partners receive substantial discounts on exhibit booths at the NAPA 401(k) Summit and are also eligible to participate on the NAPA 401(k) Summit Steering Committee.

NAPA APEX ROUNDTABLE

July 29, 2024 | Washington, D.C.

The NAPA Advisor Practice Excellence (APEX) Roundtable, an invitation-only gathering co-located with the NAPA D.C. Fly-In Forum, is exclusively designed for top defined-contribution-practice leaders. The Roundtable offers a dynamic platform for highly interactive conversations, engaging practice management discussions, and business-focused dialogues.

NAPA D.C. FLY-IN FORUM

July 30-31, 2024 | Washington D.C.

The NAPA D.C. Fly-In Forum is a convergence of elite advisors committed to advocating and aligning with national policymakers. This event is entirely advocacy focused and includes visits to Capitol Hill. Delegates are advisors who specialize in retirement plan sales and who must meet specific plan and participant thresholds to be approved to participate.

NAPA NQPA Nonqualified Plan Advisor Conference

September 2024 | TBA

NAPA's Nonqualified Plan Advisor Conference brings together advisors who have an existing nonqualified plan focus, or who are looking to grow in this rapidly expanding arena. In highly interactive and engaging workshops, advisors learn to enhance their consultative value to employers and key employees, while differentiating their practices from the competition and increasing revenue.

NAPA | NTSA ERISA 403(b) ADVISOR CONFERENCE

October 2024 | TBA

The NAPA/NTSA ERISA 403(b) Advisor Conference is an event designed for experienced professionals working with ERISA 403(b) plans. It is built specifically for ERISA 403(b) specialist advisors and consultants to gain insight from top thought leaders, share ideas with peers, build a national network of contacts, and learn innovative techniques for improving retirement outcomes.

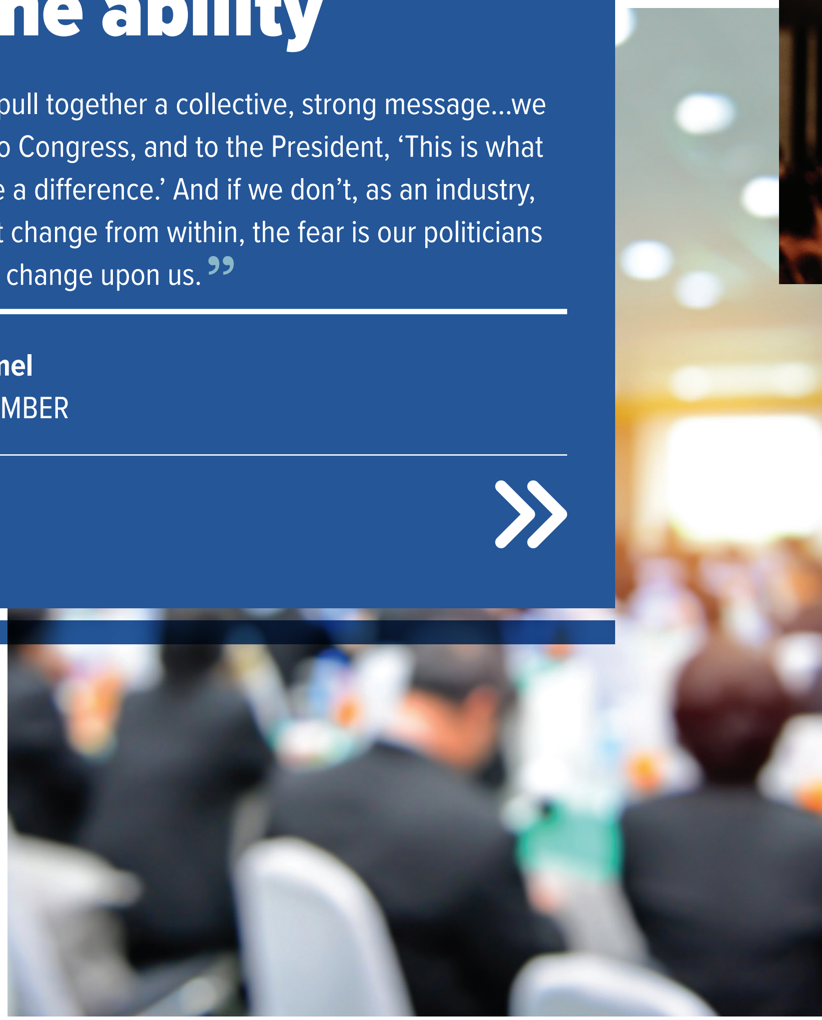
ACCOLADES

NAPA Top DC Industry Wholesalers (Advisor Allies):
Your wholesalers may participate in NAPA's ever-popular annual Top Wholesaler ("Advisor Allies") list. Winners are published on NAPA's portal, in NAPA Net Daily, are recognized through ceremony and signage at NAPA's 401(k) Summit advisor conference and are featured in the fall issue of NAPA Net the Magazine.

Nominations Solicited: March 1
Voting Opens: April 3

NAPA Top Recordkeepers (Advisors' Choice):
Advisors work with a variety of recordkeepers across different market segments, and in support of plans of all sizes and complexities—and NAPA advisors have the opportunity to identify the very best in the nation.

Voting Opens: May 15



“What NAPA offers is the ability

for us to pull together a collective, strong message...we can say to Congress, and to the President, ‘This is what can make a difference.’ And if we don’t, as an industry, drive that change from within, the fear is our politicians will force change upon us.”

Joe Brumel
NAPA MEMBER

“The great thing about NAPA,

is that not only does it provide us with a voice in Washington, it also provides us with business intelligence... tools...and best practices.”

Timothy Rice
NAPA MEMBER

FOR MORE INFORMATION, VISIT

NAPA-NET.ORG