



A Message
from
AAAA Board Chair

Dear Members and Friends of AAAA,

The Association of African American Financial Advisors (AAAA) is the leading financial services organization in fostering the inclusion, nurturing and development of African American advisors. We extend the invitation for you and your firm to ***Engage, Encounter, Embrace and Enjoy the AAAA community!***

AAAA's mission focuses on developing and fostering professional relationships among African American and other professionals working in the financial services industry. The organization strives continuously to expose its members to cutting edge trends and opportunities which will assist them in advancing their businesses and careers.

We thank you for our partnership in implementing AAAA's vision by inviting your firm's talent to speak at AAAA events, to join the AAAA community as an extension of your firm's inclusion efforts, and to share best practices—all for the elevation of the financial planning profession. ***Your investment is a tangible demonstration of your commitment to diversity and inclusion as a business imperative and the importance of attracting and retaining diverse talent and advisor clients.***

AAAA VISION, our flagship event, is slated for September 15 – 18, 2019 at the Crown Plaza Detroit Downtown Riverfront. We are excited to announce our partnership packages, which include expanded à la carte opportunities! We value our partners and have provided new, creative opportunities to engage AAAA VISION attendees and share with the profession your commitment to advancing African Americans in the financial planning profession.

Consistent with previous years, AAAA partnership opportunities for year-long engagement are **available on a first come, first serve basis.**

Secure your spot no later than March 31, 2019! Make the decision today so that you do not lose your opportunity to support the vision of empowering our community in the financial services industry and grow your business!

We look forward to seeing you in Detroit!

Lazetta Rainey Braxton, MBA, CFP®

AAAA Board Chair



For more information on the AAAA, please contact admin@aaafainc.org



Deepening the presence of African American financial professionals in the financial services industry

Our Founder:

Founded in 2001 by

**LeCount R. Davis,
MS, CFP®**

Independent Financial
Services Professional



LeCount R. Davis, Sr. earned the Certified Financial Planning designation granted by the College for Financial Planning in 1978, becoming the first African American so designated.

In 2018, InvestmentNews named Mr. Davis as the its inaugural Lifetime Achievement recipient.

Our Vision:

AAAA's vision is to be the leading organization for African American financial advisors by promoting meaningful networks among peers, partners and affiliated professionals. With a commitment to learning, business development, outreach, and support, our members are empowered to advance themselves and the financial planning profession.

Our Mission:

AAAA's mission includes developing and fostering professional relationships among African American and other professionals working in the financial services industry. The organization strives continuously to expose its members to cutting edge trends and opportunities which will assist them in advancing their businesses and careers.

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Key Strengths

Commitment

A commitment to deepening the presence and contributions of African American financial professionals in the financial services industry.

Ability

Proven ability to gather together African American financial advisors who bring expertise and dedication to advance the financial planning profession.

Hospitality

Host forums for partners to provide cutting-edge information, resources, and opportunities to members.

Leadership

Volunteer practitioners with astute business acumen and keen focus on building a sustainable organization that serves as a resource for firms, organizations, and financial professionals.

Giving Back to Our Industry

Volunteer practitioners who recognize that time is currency and who have invested much of this finite resource, as well as their expertise, in the strategic operations and execution of AAAA.



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Engage
Encounter
Embrace

AAAA VISION

AAAA VISION is a unique gathering of financial professionals who value the expertise, contributions, and collaboration of African Americans in the financial services profession. It is the premier annual gathering for reaching your target market at one place and time.

Decision Makers

AAAA attendees are in a decision-maker role
CEO | Partner | President | Sole Proprietor



Experience

AAAA members and attendees have diverse levels of experience from new entrepreneurs to seasoned and established professionals.



Engagement

As an AAAA Partner, we encourage engagement with ALL attendees in the exhibit area, and throughout the conference by participation in all events. Don't miss a single networking opportunity!



Empowerment

Partner with AAAA to expand the base of African American CFP® professionals striving to serve grow, learn and make a difference for advisors and consumers that need us!



For more information on the AAAA, please contact admin@aaafainc.org



Partner Opportunities

SHAPE THE FUTURE WITH US!

Leverage marketing opportunities to offer webinars and send communication via email and LinkedIn to AAAA members.

Share internally AAAA's partnership with firm leaders responsible for talent acquisition, client acquisition, Diversity and Inclusion and affinity groups.

Invite African American subject matter experts to serve as speakers and panelists to promote your firm's business objectives.

Bring your ideas to AAAA and trust that AAAA will work closely with your firm to implement your suggestions.



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2019 AAAA Vision Conference Agenda

September 15th – 18th, 2019

Crown Plaza Detroit Downtown Riverfront

(Schedule subject to change)

#QUADA19

Day One | Sunday, September 15, 2019

11:00	5:00	Registration
11:30	12:20	Lunch (for CFP Ethics CE Course and Multi-State Insurance Attendees only)
12:30	2:30	CFP Ethics Workshop (Preregistration Required)
2:45	4:45	Multi-State Insurance CE (Preregistration Required)
5:00	6:30	Welcome Reception

Day Two | Monday, September 16, 2019

7:30	8:45	Registration and Breakfast
8:45	9:00	Welcome and Opening Remarks
9:00	10:30	General Session Keynote
10:40	11:10	Networking Break
11:20	12:20	Concurrent Sessions
12:30	1:30	Lunch
1:40	2:40	Concurrent Sessions
2:50	3:20	Networking Break
3:30	4:30	Concurrent Sessions
4:40	5:40	Networking and Cocktails with Sponsors
7:00	10:30	Dinner with Sponsors or Dine on Your Own (Sponsors may invite up to 15 attendees for dinner)

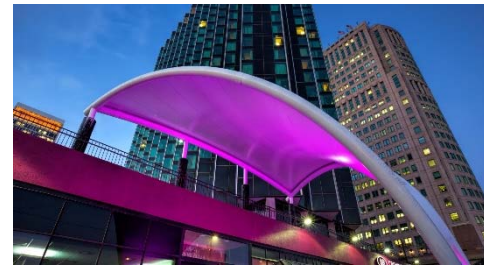
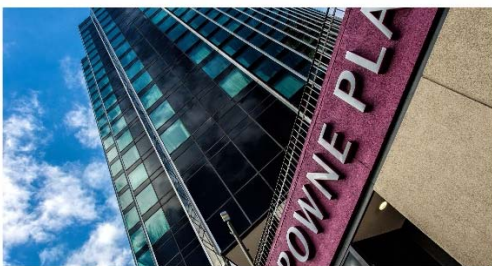
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Day Three | Tuesday, September 17, 2019

7:30	8:45	Registration and Breakfast
9:00	10:15	General Session
10:25	10:55	Networking Break
11:05	12:05	Concurrent Sessions
12:15	1:15	Lunch
1:25	2:25	Concurrent Sessions
2:35	3:05	Networking Break
3:15	4:15	Concurrent Sessions
4:30	5:30	Networking and Cocktails with Sponsors
7:00	10:30	AAAA Dinner and Entertainment Experience (Preregistration Required)

Day Four | Wednesday, September 18, 2019

7:30	8:30	Registration and Breakfast
8:40	9:55	General Session
10:05	10:35	Networking and Tech Device Raffle in Exhibit Hall
10:45	12:00	AAAA Town Hall Meeting & Closing Remarks



Crowne Plaza Detroit Downtown Riverfront

2 Washington Blvd., Detroit | Michigan | 48226
[1-313-9650200](tel:1-313-9650200)

For more information on the AAAA, please contact admin@aaafainc.org



Partnership
Benefits at a
Glance

2019 Corporate Sponsorship Levels	Platinum	Gold	Silver	Exhibit
Sponsorship Availabilities	Two Available	Five Available	Six Available	Seven Available
Speaking Opportunity	Underwrite Conference Keynote Speaker	Solo Breakout Session Presenter / 1 Space	1 Panelist in a Breakout Session	
Company Logo recognition on Conference Bag	•			
Premier Exhibit Space Assignment	•	•		
Company Logo featured on Association Website throughout year	•	•		
Email distributions to AAAA Membership	3	2		
AAAA Webinar Presentations (ideally CFP® CE approved)	2	2	1	
LinkedIn Announcements	2	2	1	
Exhibition Space	10x10	10x10	10x10	10x10
Registrations	5	4	3	2
Company logo on Conference Mobile App	•	•	•	•
Company logo on Conference Registration Website	•	•	•	•
Company logo on Conference Banners at Venue	•	•	•	•
Pre- & post attendee mailing list	•	•	•	•
COST:	\$40,000	\$30,000	\$20,000	\$7,500

New This Year! AAAA Cornerstone Sponsorship Opportunities for al-a-cart for Partner add-ons, or individual sponsorship!

For more information on the AAAA, please contact admin@aaafainc.org



2019 AAAA
VISION
Partner Levels

Platinum Sponsor – Two (2) available at \$40,000

- One to Underwrite Keynote Speaker / One to Provide Keynote Speaker (based on approval)
- Recognition as Platinum Sponsor and logo on conference bags, conference registration website, mobile app, conference banners at hotel site and on AAAA website throughout the year
- Premier Exhibit Space assignment
- Registration for five representatives (not including keynote speaker)
- 10 x 10 Exhibition booth at the conference
- Preconference registration list provided 2 weeks prior to conference/ post conference registration list provided 2 weeks after conference

During the conference year marketing campaigns including – effective Jan. 1 to Dec. 31, 2019

- Three email distributions to membership
- Two webinars for AAAA members (ideally CFP® CE approved)
- Two LinkedIn Announcements

Gold Sponsor – Five (5) available at \$30,000

- Solo Breakout Session Presenter (4)
- OR One (1) Partner opportunity for the Sunday 2-hour CE multi-state insurance continuing education session
- Recognition as a Gold Sponsor and logo on conference registration website, mobile app, conference banners at hotel site on AAAA website throughout the year
- Premier exhibit space assignment
- Registration for four representatives (not including presenters)
- 10 x 10 Exhibition booth at the conference
- Preconference registration list provided 2 weeks prior to conference/ post conference registration list provided 2 weeks after conference

During the conference year marketing campaigns including – effective Jan. 1 to Dec. 31, 2019

- Two email distributions to membership
- Two webinars for AAAA members (ideally CFP® CE approved)
- Two LinkedIn Announcements

Silver Sponsor – Six (6) available at \$20,000

- 1 panelist in a breakout session
- Recognition as a Silver Sponsor and logo on conference registration website, mobile app and conference banners at hotel site
- Registration for three representatives (not including panelist)
- 10 x 10 Exhibition booth at the conference

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- Preconference registration list provided 2 weeks prior to conference/ post conference registration list provided 2 weeks after conference

During the conference year marketing campaigns including – effective Jan. 1 to Dec. 31, 2019

- One webinar for AAAA members (ideally CFP® CE approved)
- One LinkedIn Announcement

Exhibitor – Seven (7) available at \$7,500

- Logo on conference registration website, mobile app, and conference banners at hotelsite
- Registration for two representatives
- 10 x 10 Exhibition booth at the conference
- Preconference registration list provided 2 weeks prior to conference/ post conference registration list provided 2 weeks after conference

New This Year!

AAAA Cornerstone Sponsorship Opportunities for à la carte for Partner add-ons or individual sponsorship!

Student Ambassador Sponsorship - \$15,000 (Partner add-on only)

Promote your company's brand and demonstrate commitment to the Student Ambassador Program. All funds support our upcoming college students for a unique introduction to our profession – the Next Generation! (covers travel, lodging, meals for student participants).

Mobile App Sponsorship - \$10,000

Mobile go to for all attendees to access schedule and presentation info with your company logo displayed.

Internet / Wi-Fi Sponsorship - \$10,000

Connect with attendees by connecting them to Wi-Fi! Recognition throughout conference for enhanced access.

Mobile Charging Station - \$7,500

Keep AAAA attendees charged up throughout the conference with your company's charging station open throughout the event!

Conference Lanyard - \$5,000

This is a great opportunity to promote your company's brand. Lanyards are given to all attendees at check-in. Investment includes lanyard production with your logo of choice (1 color).

Logo and tagline on Hotel Room Key Card - \$5,000

From check-in to check-out attendees will see your branding or product message every time they use their room key. Your investment includes 4-color production of your logo / message on one side of the card, distributed to all AAAA hotel guests.

For more information on the AAAA, please contact admin@aaafainc.org



2019 Partner Exhibit Details

Exhibitor Hours of Operation

Sunday	September 15 th	Set Up	2:00 – 5:00 PM
Monday	September 16 th	Exhibits Open	7:30 – 8:45 AM; 10:40 – 11:10 AM; 2:50 – 3:50 PM; 4:40 – 5:40 PM
Tuesday	September 17 th	Exhibits Open	7:30 – 8:45 AM; 10:25 – 10:55 AM; 2:35 – 3:05 PM; 4:30 – 5:30 PM
Wednesday	September 18 th	Exhibits Open	7:30 – 8:45 AM; 10:05 – 10:35 AM
Wednesday	September 18 th	Move Out	12:00 PM

- Each exhibitor will be assigned a 10X10 booth with an 8-foot drape in the back, and a 3- foot drape on each side
- Each exhibitor will be assigned a 6ft skirted table with two chairs, one wastebasket and an identification sign
- Tabletop and pop up displays and easels are permitted
- All displays of products/materials cannot obstruct the view of the surrounding displays
- Each exhibitor is responsible for keeping the aisle and surrounding display area free from congestion
- Exhibitors should bring enough material for at least 250 people
- Exhibitors are responsible for their own set up and dismantling of their exhibit however SourceOne will build and dismantle the booths if desired.

AAAA prohibits any displays which, because of noise, method of operation, materials or any other reason become objectionable. This restriction includes persons, things, conduct, printed matter or anything of a nature which AAAA determines detracts from the general character of the exhibition or does not conform to AAAA standards,

For more information on the AAAA, please contact admin@aaafainc.org

AAA Vision 5th Annual Conference Partnership Agreement

Company Information *(please print)*

Company Name *(as it should appear for recognition)*

Contact Name

Work phone

Mobile

Mailing Address

City / State / Zip

Email Address

Web Address

Twitter Address & Hashtags

Facebook Page

Payment Information

Please use the AAAA Vision 2019 Secure Registration link below to secure your Partnership today!

<https://events.eply.com/2019AAAAVisionConferencePartners>

If completing paper form, please indicate if invoice is desired or payment will be sent via check.

- Invoice Sponsor
- Check (Please make payable to AAAFA)



Sponsorship Levels:

- \$40,000 Platinum Package
- \$30,000 Gold Package
- \$20,000 Silver Package
- \$7,500 Exhibit Package
- Check if table desired

Cornerstone Sponsorships:

- \$15,000 Student Ambassadors
- \$10,000 Conference Mobile App
- \$10,000 Internet / Wi-fi Access
- \$5,000 Conference Lanyard
- \$5,000 Logo & tagline on room cards

SPONSORSHIP IS ON A FIRST COME BASIS AND IS NOT CONFIRMED UNTIL THE SPONSORSHIP FEE IS RECEIVED: DEADLINE IS /31/2019.

**AAAA VISION 2019
Sept. 15 – 18, 2019**

**Crown Plaza Detroit
Downtown Riverfront
2 Washington Boulevard
Detroit, MI 48226**

Reservations can be made by calling 1-313-965-0200 and requesting the AAAA room rate of \$189.00 single / double.

Mail checks to:
AAAFA, Inc.
3227 S. Cherokee Lane, Ste. 1320,
Woodstock, GA 30188

Fax form to: 770-516-0236;

...admin@aaafainc.org

CONFERENCE SPONSOR RULES AND REGULATIONS (APPLICABLE TO ALL SPONSORS)

CONTRACT FOR SPONSORSHIP

Sponsorship priority is based on the day and time Association of African American Financial Advisors (AAAA) receives a signed sponsorship application (aka applications are accepted on a first come, first-served basis). The receipt of your signed completed application and FULL payment of the specified sponsorship rate will constitute a reservation for sponsorship. If all sponsorship opportunities are reserved, AAAA will initiate a waiting list and assign opportunities in the event of a cancellation. If no such cancellation occurs the applicable sponsorship fee is fully refundable.

SPONSOR REPRESENTATIVE CONDUCT

All sponsor firm representatives and guests of a participating sponsor must conduct themselves in a professional and courteous manner throughout the conference. Only products and services related to the financial advisory industry should be exhibited/disseminated. Sponsor agrees not to sell any products during the course of the conference.

SPONSORSHIP DEADLINE AND CONFERENCE CANCELLATION POLICY

Applications will not be processed nor exhibit space assigned without submitting a signed completed application and payment of the specified sponsorship rate. **The window for all levels closes on March 31, 2019.** An email of the signed sponsorship application and accompanying pages is preferred. Please email documents to sponsor@aaafainc.org. Sponsorship commitments are final. Sponsorship payments are forfeited in the event of a voluntary conference cancellation.

ENFORCEMENT

Association of African American Financial Advisors reserves the right to refuse or revoke entrance to any person or company from the conference. Association of African American Financial Advisors may amend, add to, or delete from these rules as it deems necessary or appropriate and such shall be fully binding on sponsors. Association of African American Financial Advisors reserves the right in its sole discretion to cancel any sponsorship application or agreement at any time, if the applicant has violated, or Association of African American Financial Advisors reasonably believes that the applicant will violate, any of the sponsorship rules set forth in the Sponsorship Rules and Regulations or has engaged in or is engaging in any activity that reflects negatively on Association of African American Financial Advisors favorable image, goodwill, reputation, or acceptance by its members or the public. Association of African American Financial Advisors shall not be liable for special, consequential or incidental damages, loss, or expenses, directly or indirectly, arising from or in connection with the cancellation of this sponsorship, notwithstanding notice to Association of African American Financial Advisors of the possibility of such damages, loss of expense. Association of African American Financial Advisors maximum liability shall not in any case exceed the payment made to Association of African American Financial Advisors by the sponsor.

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NAME, TRADEMARK, SERVICEMARK RESTRICTION

The Sponsor acknowledges that Association of African American Financial Advisors is the sole owner of its name and the name may not be used in any advertising or other communication. Association of African American Financial Advisors does not endorse any Sponsor. Sponsor agrees to indemnify Association of African American Financial Advisors from any loss or damage arising from violation of this rule.

IMPOSSIBILITY

Association of African American Financial Advisors reserves the right to cancel the conference if strikes, natural disasters, disruption to the transportation network, acts of terrorism, or other events make it impossible or inadvisable to hold the scheduled event. If cancellation occurs under this description, sponsorship fees will be returned, pro-rata after cancellation fees and other expenses, or to the extent funded by the sponsor's insurance.

LIABILITY

Sponsor agrees to assume all liability, risk, and responsibility for injury, theft, loss, expense or damage of any kind to any property or component thereof, and to assume all liability for damage to property, person or persons arising from accidental or other causes incidental to operations of sponsorship and hereby releases Association of African American Financial Advisors and its officers and director, conference attendees, representatives and employees of Crown Plaza Detroit Downtown Riverfront Hotel from any and all claims of injury, loss or damage. Association of African American Financial Advisors expressly disclaims all liability, expressed or implied, for the truth or legality of the content of any presentation or material distributed.

EXHIBITION RULES FOR SPONSORS

Subletting, sharing, allocation, partnering or any other similar arrangement of space is prohibited. A Sponsor may neither assign, allocate, apportion the whole or any part of space allotted, or display any goods other than those manufactured or distributed by the Sponsor in the regular course of the Sponsor's business. The featuring of names or advertisements of non-sponsoring firms or businesses will not be permitted.

Solicitation by non-sponsors is prohibited. Firms and representatives not assigned exhibit space are prohibited from soliciting business in any form. Violators of this prohibition will be required to immediately leave the conference. Distribution of products, marketing materials, or souvenirs will be allowed, provided it is done in a dignified manner, does not create a nuisance and causes no interference with adjoining exhibits. Should a nuisance or traffic problem due to the distribution of products or souvenirs occur, the Sponsor will be requested to halt distribution, or to distribute the item only at certain times. Helium balloons are not permissible at any time as part of the décor or as handouts.

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Permissible giveaways, magazines, merchandise, literature and souvenirs may be distributed only within a Sponsor's booth. Sponsors are allowed to dispense food or beverage from their booth space provided that food or beverage is purchased from Crown Plaza Detroit Downtown Riverfront Hotel. The Sponsor must also comply with all Crown Plaza Detroit Downtown Riverfront Hotel regulations regarding food and beverage dispensing. Sponsors who want to sponsor any type of contest, raffle or drawing for prizes must obtain approval from Association of African American Financial Advisors. Among other requirements, which Association of African American Financial Advisors in its discretion may prescribe, the following rules must be adhered to:

1. The Sponsor must comply with all local, state and federal laws that apply to such raffles, contests or drawings.
2. Contest, raffle or drawing rules must be posted at the booth. The rules must include eligibility, date and time of drawing (contest, raffle), the words "no purchase necessary to enter," in bold prominent print, odds of winning, how winners will be notified, how participants may find out who won, etc.
3. Association of African American Financial Advisors must be notified of the name(s) of the winner(s) when the prize(s) has been awarded.

Sponsors are not allowed to conduct any live or taped video or audio broadcasts from their booth space or from anywhere else in the Crown Plaza Detroit Downtown Riverfront Hotel without prior written consent from Association of African American Financial Advisors. If approved, security escorts paid by the Sponsor for such activities must be arranged through the Crown Plaza Detroit Downtown Riverfront Hotel and Association of African American Financial Advisors. Sponsors are not allowed to photograph or videotape any booth other than that of the company they represent. Videotaping of a company's own booth is permitted and requires prior approval from Association of African American Financial Advisors. Security escorts paid by the Sponsor for such activities must be arranged through the Crown Plaza Detroit Downtown Riverfront Hotel and Association of African American Financial Advisors.

Gasoline, kerosene, acetylene or other flammable or explosive substances are neither permitted nor used in the Exhibitor Hall. No combustible decoration such as crepe paper, tissue paper, cardboard or corrugated paper is to be used at any time. Helium balloons are not permissible. All packing containers, excelsior and wrapper paper are to be removed from the exhibit floor and must not be stored under tables or behind displays. Any vehicle or other apparatus, which has a fuel tank and is part of a display, is required to be equipped with a locking (or taped) gas cap and can contain no more than one gallon of gasoline. Battery cables must be disconnected once the vehicle is positioned. The engine cannot be operated during exhibit hours. Refueling must be done off property. Loudspeakers, phonographs, sound movies, video projectors or megaphones must not interfere with adjoining Sponsors. Movies or video projectors must be located so as not to interfere with other Sponsors or aisle space, and operation of such equipment must conform to rules of the Crown Plaza Detroit Downtown Riverfront Hotel and Association of African American Financial

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Advisors. Sponsors whose booths involve a theater or ongoing presentations must submit a complete lineup and script of the presentations for content review, along with any scheduled speakers appearing in the booth. The playing of any music on the exhibit floor is not permitted other than music piped in by the Crown Plaza Detroit Downtown Riverfront Hotel and Association of African American Financial Advisors. This applies to live and recorded music, including that played on videotapes. Except for compliance with the Americans with Disabilities Act, no animals shall be permitted to enter any meeting, lobby or exhibit space utilized for Association of African American Financial Advisors Annual Conference 2019.

AGREEMENT

The rules and regulations outlined above require agreement by signature below and must be submitted with the Conference Sponsorship Application. The undersigned acknowledges receiving a copy of the 2019 AAAA Conference Rules and Regulations and agrees to abide by all provisions, rules and regulations as published therein. The undersigned further agrees that the 2019 Rules and Regulations are incorporated by reference into this contract. If any provision of this contract is deemed to be invalid or unenforceable under applicable law, this contract shall be considered divisible as to such provision and same shall thereafter be inoperative; provided, however, that the remaining provisions of this contract shall be valid and binding. Sponsor represents and warrants that the individual signing this agreement is duly authorized by Sponsor to bind Sponsor to the terms and conditions of this agreement.

Sponsor assumes responsibility and agrees to indemnify, hold harmless and defend Association of African American Financial Advisors and its respective employees and agents against any claims or expenses arising out of the use of the conference premises. The Sponsor understands Association of African American Financial Advisors does not maintain insurance covering the Sponsor's property and it is the sole responsibility of the Sponsor to obtain such insurance.

Print Name of Authorized Sponsor Representative _____

Signature of Authorized Sponsor Representative _____



Crowne Plaza Detroit Downtown
Riverfront

2 Washington Blvd., Detroit | Michigan | 48226
1-313-9650200

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