



**That 401(k) Conference**  
**Friday, October 14, 2022, 9 am - 2 pm**  
**Bank of America Stadium, Charlotte, NC**

**Why another conference?**

There are a lot of industry-wide 401(k) conferences that are great in the idea of getting people together, but not so great in helping 401(k) advisors out and by nearly bankrupting those who want to sponsor the event and reach out to advisors.

That is why That 401(k) Conference will host a regional conference in Charlotte, NC at Bank of America Stadium, home of the Carolina Panthers.

**How will That 401(k) Conference be different from all other conferences?**

The attendees will be 401(k) advisors with books of business, culled from data and from a database of financial advisors with actual plans on the books.

**It will be unique because it won't be just 401(k) plans.**

We're going to be at the home of the Carolina Panthers, with a stadium tour and lunch. This event will stand out among other conferences that want your sponsorship.

**35-50 Advisors in Attendance, Avoiding No-Shows:**

We're going to charge a nominal fee for attendance to insure advisors who reserve a spot will attend because there is nothing worse to promise a certain attendance to sponsors and fail. It will also encourage real 401(k) advisors to attend instead of an advisor who may not have a book of business and just wants a free meal.

For attendees, \$100 will get them 4 hours of information to help their practice, lunch, stadium tour, and a meet and greet with a Panthers great.

**The Bottom Line on Sponsorships:**

\$1,500 to be a sponsor and provide a 20-25 minute presentation (subject to approval to avoid redundancy of topics).

\$750 to be the sponsor of the Bank of America Stadium Tour

\$500 to be a sponsor and provide a 2-3 minute presentation on your firm's services

**For more information:**

If interested in sponsoring the inaugural event or being part of the next regional event (Seattle, Milwaukee, and New Orleans come to mind), please contact me at [ary@therosenbaumfirm.com](mailto:ary@therosenbaumfirm.com) or 516-594-1557.