

AUSTIN, TX | SEPT 25-27, 2025

Exhibitor & Sponsor Opportunities

Ready to make an impact? Support advisors' independence by becoming an exhibitor or sponsor.

[Submit Your Application →](#)

[Contact us events@xyplanningnetwork.com →](mailto:events@xyplanningnetwork.com)

The XYPN LIVE Experience

Exhibit Hall Day

Dedicated full-day Exhibit Hall Day on September 26, 2025.

XYPN LIVE is both dynamic—the majority of attendees are decision-making firm owners, meaning a zero-day sales cycle and a nimble vendor review process are the norm—and uniquely immersive—the unique one-day exhibit hall means attendees don’t breeze by your booth.

→ The Exhibit Hall is where the conference happens on Exhibit Hall Day

That’s because the exhibit hall becomes the center of the conference. The highly engaged advisor audience spends all day engaging with exhibitors & learning the latest in advice tech on the expo stage. Traffic is so steady that it's hard for exhibitors to step away for a break. It's a truly unique experience.



CLICK TO SEE
2023 Event Recap Video



CLICK TO SEE
Previous Speakers



CLICK TO SEE
Past Exhibitor Experiences

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 CEO and COO, meaning a **0-day sales cycle** with a nimble vendor review process is the norm.

The Network

XYPN is a Network of almost 2,000 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.



We currently serve over 1,700 firms and register an estimated 30% of all new state-registered RIAs each year. With more than \$40 billion in assets under management, we represent some of the fastest-growing advisors in the industry.

The Schedule

With our one-day Exhibit Hall format, you’ll waste no time waiting for attendees to get out of content sessions—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 KEY

- EVERYONE
- ACCESSIBLE BY ADVISOR ATTENDEES, AND HOSTED BY PLATINUM, PARTY, BLUE, AND GREEN SPONSORS ONLY
- PLATINUM + PARTY SPONSORS + ADVISOR ATTENDEES ONLY

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

The Vetting Process

XYPN is known for inviting only the most relevant tech & solutions—a reputation that means you'll engage in meaningful, in-depth conversations with attendees who are primed to find a long-term partner.

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.

SEPT 25	SEPT 26	SEPT 27
Pre-Cons	Exhibit Hall	
Workshops	Keynotes	
Content Sessions	Tech Showcase	
Opening Remarks	AdviceTech Comp	
Welcome Reception*	Share Sessions	Keynotes
	Ask Me Anything	Content Sessions
	Happy Hours	Closing Party **

What's included?

Dedicated One-Day Exhibit Hall

Designed so there's no competition between your booth and content sessions, XYPN LIVE puts authenticity first so exhibitors enjoy real connections with the XYPN audience.

Complimentary Lead Retrieval

The conference app allows exhibitors to scan the unique QR code on attendee name badges to collect leads at the conference. Once the conference wraps, you'll receive your new leads in your email, making follow-up seamless.

Content Session & Main Stage

Sit in on content sessions and even apply to speak on a topic of your choice on Exhibit Hall Day. Submit your session within the **Speaker Application**. Selection is based on merit and relevance to our advisor audience and is not guaranteed.

Exhibit Hall Events

The AdviceTech Competition and Tech Showcase are an attendee favorite on Exhibit Hall Day. These draw major WealthTech media, movers, and shakers who also explore the exhibit hall to learn more about what exhibitors are building for advisors.

Mobile App

The conference app connects attendees before, during, and after XYPN LIVE. Released ahead of the conference, you'll get access to pose questions and engage with advisor attendees.

Evening Events

All exhibitors are invited to kick off XYPN LIVE with attendees at the Welcome Reception.** Platinum, Party, Blue, and Green sponsors get the opportunity to host a Happy Hour on the evening of September 24th, included in the schedule and promoted by XYPN. ***

Networking

12+ Hours of In-Person Networking Opportunities

- Exhibit Hall Day
- Host a Happy Hour*
- Welcome Reception**

Meet engaged financial planners, team XYPN, and aligned companies.

Brand Visibility

XYPN LIVE Exhibitors get their logo featured in the Conference Guide and website.

Sponsors get even more visibility to the Network ahead of XYPN LIVE with a blog, full page ads, and email features in addition.

Primed Audience

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

Advisor attendees are engaged and eager to find the best tech and solutions to support them in running a more efficient firm.

*See "Evening Events"

** For a small fee, exhibitors can attend the Welcome Reception.

***The Closing Party is a private event reserved for our top Platinum and Party sponsors.

Exhibit Hall Day Events

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 2025!

“

From the get-go, we had our eyes set on the Advicetech Competition. It wasn't about winning a contest. [The XYPN AdviceTech competition] was the contest. The year after, we tripled our business. We had a storm of XYPN members coming to us afterward and have seen very strong growth since.

Johnny Poulsen

INCOMELAB

2023 ADVICETECH COMPETITION WINNER

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 package guarantees the admission of one exhibitor into the showcase. It's the best way to position your brand front and center of the 650+ attendees looking for their next great partner. **Apply to exhibit today!**

The Expo Stage

To keep advisors engaged and in the exhibit hall space, we've put the Expo Stage in the heart of the exhibit hall where both the AdviceTech Competition and Tech Showcase take place.

Ways to Attend

Sponsorship Package

Platinum Sponsor

0 AVAILABLE

SOLD OUT

STANDARD PRICING \$30,000

Early Bird Pricing (Ends 12.31.24)	\$26,000
Exhibitor Booth Size	10 x 20
Exhibitor Passes	4
Discount on À la Carte Additional	20%
Passes for Confirmed Exhibitors	\$599

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

Party Sponsor

2 AVAILABLE

STANDARD PRICING \$30,000

Early Bird Pricing (Ends 12.31.24)	\$26,000
Exhibitor Booth Size	10 x 20
Exhibitor Passes	4
Discount on À la Carte Additional	20%
Passes for Confirmed Exhibitors	\$599

Make a splash! The Party sponsor positions their brand in the center of attendee favorite evening receptions.

Power Sponsor

2 AVAILABLE

STANDARD PRICING \$30,000

Early Bird Pricing (Ends 12.31.24)	\$26,000
Exhibitor Booth Size	10 x 20
Exhibitor Passes	4
Discount on À la Carte Additional	20%
Passes for Confirmed Exhibitors	\$599

Share your companys knowledge! Power sponsorship puts your brand front-and-center in a content session.

Exhibitor Booth Package

Solutions

STANDARD PRICING \$15,000

Early Bird Pricing (Ends 12.31.24)	\$13,000
Exhibitor Booth Size	10 x 10
Exhibitor Passes	2
Passes for Confirmed Exhibitors	\$599

You belong to this category if your company distributes investment or insurance products through advisors to their clients.

Technology & General

STANDARD PRICING \$7,000

Early Bird Pricing (Ends 12.31.24)	\$5,500
Exhibitor Booth Size	10 x 10
Exhibitor Passes	2
Passes for Confirmed Exhibitors	\$599

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

Blue Sponsor

3 AVAILABLE

STANDARD PRICING \$22,000

Early Bird Pricing (Ends 12.31.24)	\$18,000
Exhibitor Booth Size	10 x 10
Exhibitor Passes	3
Discount on À la Carte Additional	15%
Passes for Confirmed Exhibitors	\$599

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

Green Sponsor

5 AVAILABLE

STANDARD PRICING \$17,000

Early Bird Pricing (Ends 12.31.24)	\$14,000
Exhibitor Booth Size	10 x 10
Exhibitor Passes	3
Discount on À la Carte Passes for Confirmed Exhibitors	10% \$599

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

Newcomer

STANDARD PRICING \$3,500

Early Bird Pricing (Ends 12.31.24)	\$2,500
Exhibitor Booth Size	6 x 6
Exhibitor Passes	2
Passes for Confirmed Exhibitors	\$599

This is your category if you're a start-up that launched after October 2024 or have annual revenue less than \$500k.

Consultant

STANDARD PRICING \$2,000

Early Bird Pricing (Ends 12.31.24)	\$1,600
Exhibitor Booth Size	Table
Exhibitor Passes	2
Passes for Confirmed Exhibitors	\$599

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

Sponsorship Packages

	<div><div>SOLD OUT</div>Platinum</div> 1 Available	Party	Power	Blue	Green
	2 Available	2 Available	2 Available	3 Available	5 Available
Standard Pricing	\$30,000	\$30,000	\$30,000	\$22,000	\$17,000
Early Bird Pricing ENDS 12.31.24	\$26,000	\$26,000	\$26,000	\$18,000	\$14,000
Exhibitor Booth Size	10X20	10X20	10X20	10X10	10X10
Exhibitor Passes Included	4	4	4	3	3
Discount on Á la Carte	20%	20%	20%	15%	10%
Additional Pass for Confirmed Exhibitors	\$599	\$599	\$599	\$599	\$599
Main Stage Slot before Keynote	●	○	○	○	○
Logo at Event Check-In	●	○	○	○	○
Mobile App Push Notification	●	●	○	○	○
Booth location Premier 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	●	●	●	●	●

550,624
PLATINUM SPONSOR IMPRESSIONS IN 2023

À la Carte Add-Ons

Marketing Add-Ons

INCREASE VISIBILITY + PROMOTE YOUR BRAND

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
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Branded Clings	\$2,000
Increase visibility at XYPN LIVE with <i>one</i> branded cling placed near breakout sessions rooms.	5 AVAILABLE

Promote your brand in two XYPN LIVE campaign emails with hyperlink to your brand website.

Attendee Engagement Add-Ons

CONNECT WITH ATTENDEES + GENERATE EXCITEMENT

XYPN LIVE Scholarships	\$3,500
Make a positive impact on underrepresented communities by providing XYPN LIVE conference scholarships to five attendees.	

Your brand will be included in all scholarship comms.

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

XYPN will announce the winner that evening on the main stage during our awards ceremony.

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.	

Inclusion of one branded sign located by the focus group area.

SOLD OUT AVAILABLE

Platinum Sponsorship

Become a conversation leader at XYPN LIVE with the conference's top-tier Platinum Sponsorship, and you'll be top-of-mind for our 800+ 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
- 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 800+ 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

Year Round 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 almost 2,000 XYPN Members

Standard Pricing **\$30,000**

Early Bird Pricing **\$26,000**
Ends 12.31.24



550,624

PLATINUM SPONSOR IMPRESSIONS IN 2023

2 AVAILABLE

Party Sponsorship

Start and end the XYPN LIVE experience on the right foot by sponsoring an evening party. 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
 - Welcome Reception
- A 10x20 booth in a premier exhibit hall location
- Top-tier promotion and visibility
 - Your logo displayed on the conference schedule & 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 800+ attendees at XYPN LIVE
- 4 Exhibitor Passes for your team
- Exclusive access to other evening events
- 20% discount on Á la Carte add ons

Year Round Promotion:

- Hyperlinked logo in all party promotion email communications to 800+ attendees
- Promotion in all social and party promotion posts reaching 10,000+ email subscribers
- Membership newsletter video feature reaching almost 2,000 XYPN Members

Standard Pricing	\$30,000
Early Bird Pricing	\$26,000
Ends 12.31.24	

2 AVAILABLE

Power Sponsorship

The Power sponsorship positions your brand to have impactful engagement opportunities throughout XYPN LIVE. On Exhibit Hall day, you'll directly reach the advisor audience and inspire attendees to rethink and reimagine their approach to running their firm on the day-to-day operations.

Exclusive Access

Power sponsorship is the best way to share your expert insights with the advisor audience on Exhibit Hall day and includes exclusive access to:

- 60-minute exhibitor content session on Exhibit Hall Day
- A 10x20 booth
- Top-tier promotion and visibility
 - Your logo displayed on the conference schedule & in the app
 - A full-page spread in the Conference Guide
 - Your logo on all party signage and promotion

- 4 Exhibitor Passes for your team
- Exclusive access to other evening events
- 20% discount on Á la Carte add ons

Year Round Promotion:

- Your logo on the Conference Guide's back cover
- Promotion and feature in all sample schedule posts
- Membership newsletter video feature reaching almost 2,000 XYPN Members

Standard Pricing	\$30,000
Early Bird Pricing	\$26,000
Ends 12.31.24	

3 AVAILABLE

Blue Sponsorship

Blue sponsorships offer the opportunity to boost your brand and have a hand in running the high-visibility essentials that make the XYPN LIVE experience possible, ensuring every attendee will have your brand to thank for powering the conference.

Exclusive Access:

- 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 À la Carte add ons

Standard Pricing **\$22,000**

Early Bird Pricing \$18,000
Ends 12.31.24

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.

Wifi

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

SOLD OUT

Conference App

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

Tech Showcase

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

5 AVAILABLE

Green Sponsorship

Put your brand front-and-center for every XYPN LIVE attendee with green sponsorship packages. These allow you to put your brand in the hands of attendees with high-touch amenities.

Exclusive Access:

- 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 **\$17,000**

Early Bird Pricing \$14,000
Ends 12.31.24

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 conversations with coffee on day 1 & day 3

Exhibit Day Lunch

Want to spice up your lunch break? Sponsor it!

SOLD OUT

Hotel Key Cards

Put your brand in the hands of each attendee who stays at the Austin Marriott Downtown.

SOLD OUT

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.



3,493

LEADS CAPTURED BY 2023 EXHIBITORS

5,843

MESSAGES SENT ON THE CONFERENCE APP IN 2023

Frequently Asked Questions

Do you supply an attendee list?

XYPN LIVE attendees value their privacy and prefer meaningful, relationship-driven interactions over unsolicited sales. To uphold that trust, we don't post or provide lists of attendee information. But our commitment doesn't stop you from building relationships with our attendee audience.

XYPN LIVE's 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 do exhibitors set up and break down their booths?

*Schedule & times subject to change

THURSDAY, SEPT 25

- Exhibitor Move-In: 3:00 PM - 7:00 PM CT

FRIDAY, SEPT 26

- Exhibitor Move-In: 8:00 AM - 9:30 AM CT
- Exhibit Day: 9:45 AM - 5:00 PM CT
- Lunch: 12:00 PM - 1:00 PM CT
- Exhibitor Move-Out: 5:30 PM - 9:30 PM CT
- Exhibitor Happy Hours for Sponsors: 7:30 PM - 9:30 PM CT

When is the deadline to apply?

Physical booths come on a first-come, first-serve basis. In 2024, the exhibit hall sold out, so grab your spot early!

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, 2025.

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.

AUSTIN, TX | SEPT 25-27, 2025

Support advisors' independence in 2025

Submit Your Application →

Contact us events@xyplanningnetwork.com →