

# THE ASSOCIATION OF AFRICAN AMERICAN FINANCIAL ADVISORS



## 2023 CORPORATE PARTNERSHIP PROSPECTUS

Benefits of Partnering with AAAA



**Recruiting & Placement  
Of Experienced Talent**



**Next Generation Talent  
Development**



**Member Professional  
Development Opportunities**



**Networking and Business  
Development for Members**



**Advocacy For B/AA  
Professionals in Wealth  
and Asset Management**

FOR MORE INFORMATION ,CONTACT US

TELEPHONE: (202) 572-1019

WEBSITE: [WWW.AAAFAINC.COM](http://WWW.AAAFAINC.COM)

1050 CONNECTICUT AVENUE NW | SUITE 500  
WASHINGTON, DC 20036



## Partner with us to bridge the racial wealth gap

The **ASSOCIATION OF AFRICAN AMERICAN FINANCIAL ADVISORS (AAAA)** is a nonprofit financial organization that was created to address the needs and concerns of African American Financial Advisors and affiliated Professionals. As a membership-based organization, we are committed to continuing our work uplifting communities impacted by adversity, lack of opportunities, and industry gaps. We work in alliance with leading financial institutions and firms, academic leaders at Historically Black Colleges and Universities that support finance degree programs, legislative and regulatory bodies, and lastly consumer interest organizations.

AAAA was founded as a means to foster the value of career opportunities within financial services and advance the profession of Black/African Americans in the industry. We are committed to creating equitable opportunities for our members and appreciate you joining us.



**700+** Advisory, Affiliate and  
Student Members



## OUR MISSION

The Association of African American Financial Advisors serves to expand the community of successful Black financial professionals.

## OUR VISION

The Association of African American Financial Advisors envisions a future where the Black community is financially savvy with expert guidance to sustain generational wealth.

## OUR VALUES

### COMMUNITY

Strengthen the community of members through access to information, resources and practices that positions the professionals for success

### STEWARDSHIP

Providing members with access and the opportunity to build their financial acumen, credentials and network to build the career of their dreams

### ADVANCEMENT

Respecting the experience of black financial professionals and investing in ways that grows each member and partner that shares our mission and vision

# AAAA BOARD OF DIRECTORS



LECOUNT DAVIS, MBA,  
CFP®  
Founder



ALEX DAVID  
In-coming Chair Emeritus  
PRESIDENT AND CEO OF STIFEL  
INDEPENDENT ADVISORS



CHRISTIAN NWASIKE MFP®  
Chairman of the Board  
PRINCIPLE AND EXECUTIVE  
MANAGING PARTNER AT PRACTICE  
MANAGEMENT CONSULTANTS, LLC



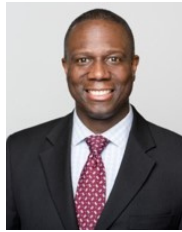
RICKIE TAYLOR  
1st Vice Chairman  
REGIONAL DIRECTOR  
RETIREMENT PLAN CONSULTANTS



SHEENA GRAY, MBA  
2nd Vice Chairwoman  
EXECUTIVE DIRECTOR DIVERSE  
ADVISOR EXPERIENCE  
JP MORGAN WEALTH  
MANAGEMENT



SHARIF MUHAMMAD, MBA, CPA, MST, CFP®  
Financial Secretary  
FOUNDER AND MANAGING MEMBER  
UNLIMITED FINANCIAL SERVICES, LLC



DESI WYATT, CRPC®  
Corporate Partnerships Chairman  
WEALTH ACADEMY HEAD, US  
CONSUMER WEALTH  
MANAGEMENT  
CITI



ARAYA MESFIN, CFP  
Corporate Partnerships Co-Chairman  
MANAGING DIRECTOR - WEALTH  
MANAGEMENT  
UBS



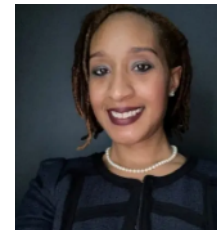
RAYMONE JACKSON, CLU, ACS, FLMI  
Memberships Chairman  
GLOBAL HEAD OF DEI  
T. ROWE PRICE



REGINALD LILLIE II  
Memberships Co-Chairman  
DIRECTOR, BUSINESS  
DEVELOPMENT MANAGER  
BANK OF AMERICA MERRILL  
LYNCH



ALLESON TATE, CFP®  
Marketing and Public Relations  
Chairwoman  
FOUNDER AND PRINCIPAL  
AVERE WEALTH MANAGEMENT



DR. DANA PALMA, AAMS™  
Board Secretary  
FINANCIAL ADVISOR  
EDWARD JONES



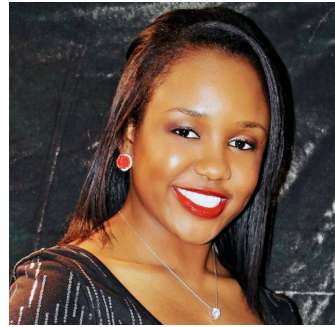
CHIQUITA HALL JACKSON  
General Counsel  
MANAGING ATTORNEY  
HALL-JACKSON &  
ASSOCIATES

# MEET OUR EXECUTIVE & ADMIN TEAM



Necho Carroll  
Chief of Staff  
Membership

[Necho.Carroll@aaafainc.org](mailto:Necho.Carroll@aaafainc.org)



Chelsey Johnson  
Program Coordinator II  
Partnership

[Chelsey.Johnson@aaafainc.org](mailto:Chelsey.Johnson@aaafainc.org)



Tejan Rahim  
Program Coordinator I  
Membership

[Tejan.Rahim@aaafainc.org](mailto:Tejan.Rahim@aaafainc.org)

Open  
Program Coordinator I  
Conference Planning

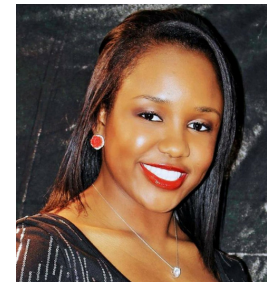
# AAAA 2022-2023 CORPORATE PARTNERSHIP COMMITTEE MEMBERS



DESI WYATT, CRPC®  
Corporate Partnerships Chairman  
Wealth Academy Head, US Consumer  
Wealth Management  
CITI



ARAYA MESFIN, CFP  
Corporate Partnerships Co-Chairman  
Managing Director- Wealth  
Management  
UBS



CHELSEY JOHNSON  
AAAA Executive Team Liaison  
ASSOCIATION OF AFRICAN  
AMERICAN FINANCIAL  
ADVISORS



FRANZ WARREN  
Managing Director,  
Regional Director  
JP MORGAN CHASE



SAMANTHA KAINDI, MBA  
Onboarding Team Leader  
FIDELITY INVESTMENTS



JASMINE DAVIS  
Senior Vice President  
Associate Complex Manager  
MORGAN STANLEY

# 2023 PARTNERSHIP LEVELS



## SPONSORSHIP & BENEFIT LEVELS AT A GLANCE

Benefits	Ambassador	Diamond	Platinum	Gold
Regional Meet Up	12	10	8	6
Webinars	6	5	4	3
Job Postings	Unlimited	Unlimited	100/annually	75/annually
Social Media Announcements	24	20	16	12
Email Distributions	10	8	6	4
Complimentary Advisory/Affiliate Memberships	100/200	80/160	70/140	60/120
Invitation to CEO Roundtable Discussions	✓	✓	—	—
Invitation to DEI Leader Roundtable Discussion	✓	✓	—	—
Invitation to Sales Manager Roundtable	✓	✓	✓	✓
Sponsorship and Engagement with AAAA's Financial Professional Development Programs	✓	✓	✓	✓
Sponsorship of & Participation in AAAA's V.I.S.I.O.N. Lite & Regular	✓	✓	✓	✓
Sponsorship and Engagement with AAAA's Next Gen Talent Development Program	✓	✓	✓	✓
B/AA Industry Research Report Sponsor	✓	—	—	—
Sponsorship Cost	\$250,000	\$175,000	\$100,000	\$75,000



## SPONSORSHIP & BENEFIT LEVELS AT A GLANCE

Benefits	Silver	Bronze	Affiliate	Supporter
Meet Up Sponsor (logo placement only)	✓	✓	✓	—
Webinars	6	4	2	1
Job Postings	50/annually	35/annually	20/annually	5/annually
Social Media Announcements	6	4	3	1
Email Distributions	3	—	—	—
Complimentary Advisory/Affiliate Memberships	50/100	35/70	25/50	5/10
Invitation to CEO Roundtable Discussions	—	—	—	—
Invitation to DEI Leader Roundtable Discussion	—	—	—	—
Invitation to Sales Manager Roundtable	✓	✓	—	—
AAAA Bi-Weekly Newsletter Sponsor (logo placement only)	✓	✓	✓	✓
Sponsorship of AAAA's V.I.S.I.O.N. Lite & Regular (logo placement) only)	✓	✓	✓	✓
AAAA's Next Gen Talent Development Program Sponsorship (logo placement only)	✓	✓	✓	✓
B/AA Industry Research Report Sponsor	—	—	—	—
Sponsorship Cost	\$50,000	\$35,000	\$20,000	\$5,000-\$10,000

# AMBASSADOR LEVEL MEMBER

## ROUNDTABLE INVITATIONS

- Invitation to CEO Roundtable Discussions
- Invitation to DEI Leader Roundtable Discussion
- Invitation to Sales Manager Roundtable Discussion
- Black/African American Industry Research Report Sponsor

\$250,000

## AAAA's V.I.S.I.O.N. Summit & Conference

Participation and Sponsorship of

- AAAA's Annual V.I.S.I.O.N. Conference
- VIP Breakout Spotlight Room- One day
  - September 2023
- One day (in-person) Regional Conferences
  - March 2023
  - June 2023
- Virtual V.I.S.I.O.N. – One day (virtual) webcast
  - December 2023

Access to all participants data

525

2022 Attendees

## AAAA MEMBERS DEVELOPMENT

### PROGRAM SPONSORSHIP

- Next Generation Talent Development Program Sponsorship
  - Expanding opportunities for Black/African American Students into wealth management- Access to participant data
- Sponsorship & Participation in AAAA's Financial Professional Development Programs
  - Black/African American Financial Advisor Development Program -Access to participant data
  - Black/African American Back Office Development Program –Access to participant data
- Ability to host live webinars
- Ability to host regional meetups

## PROMOTION AND BRANDING

- 1 Promotion of Sponsor Brand Social Media  
Social Media Platforms: Facebook, LinkedIn, and Twitter
- 2 Branded Email Distribution  
Stay on Brand (AAAA) for Email Distribution  
100 Words or Less + Image
- 3 Unlimited Complimentary Job Postings to AAAA's Job Board & Career Center

# DIAMOND LEVEL MEMBER

## ROUNDTABLE INVITATIONS

- Invitation to CEO Roundtable Discussions
- Invitation to DEI Leader Roundtable Discussion
- Invitation to Sales Manager Roundtable Discussion

\$175,000

## AAAA's V.I.S.I.O.N. Summit & Conference

Participation and Sponsorship of

- AAAA's Annual V.I.S.I.O.N. Conference
  - September 2023
- One day (in-person) Regional Conferences
  - March 2023
  - June 2023
- Virtual V.I.S.I.O.N. – One day (virtual) webcast
  - December 2023

Access to all participation data

525

2022 Attendees

## AAAA MEMBERS DEVELOPMENT PROGRAM SPONSORSHIP

- Next Generation Talent Development Program Sponsorship
  - Expanding opportunities for Black/African American Students into wealth management- Access to participant data
- Sponsorship & Participation in AAAA's Financial Professional Development Programs
  - Black/African American Financial Advisor Development Program -Access to participant data
  - Black/African American Back Office Development Program –Access to participant data
- Ability to host live webinars
- Ability to host regional meet ups

## PROMOTION AND BRANDING

- 1 Promotion of Sponsor Brand Social Media  
Social Media Platforms: Facebook, LinkedIn, and Twitter
- 2 Branded Email Distribution  
Stay on Brand (AAAA) for Email Distribution  
100 Words or Less + Image
- 3 Unlimited Complimentary Job Postings to AAAA's Job Board & Career Center

# PLATINUM LEVEL MEMBER

## ROUNDTABLE INVITATIONS

- Invitation to Sales Manager Roundtable Discussion

\$100,000

## AAAA's V.I.S.I.O.N. Summit & Conference

Participation and Sponsorship of

- AAAA's Annual V.I.S.I.O.N. Conference
  - September 2023
- One day (in-person) Regional Conferences
  - March 2023
  - June 2023
- Virtual V.I.S.I.O.N. – One day (virtual) webcast
  - December 2023

Access to all participation data

525

2022 Attendees

## AAAA MEMBERS DEVELOPMENT PROGRAM SPONSORSHIP

- Next Generation Talent Development Program Sponsorship
  - Expanding opportunities for Black/African American Students into wealth management- Access to participant data
- Sponsorship & Participation in AAAA's Financial Professional Development Programs
  - Black/African American Financial Advisor Development Program -Access to participant data
  - Black/African American Back Office Development Program –Access to participant data
- Ability to host live webinars
- Ability to host regional meetups

## PROMOTION AND BRANDING

- 1 Promotion of Sponsor Brand Social Media  
Social Media Platforms: Facebook, LinkedIn, and Twitter
- 2 Branded Email Distribution  
Stay on Brand (AAAA) for Email Distribution  
100 Words or Less + Image
- 3 100 Complimentary Job Postings to AAAA's Job Board & Career Center (Annually)

# GOLD LEVEL MEMBER

## ROUNDTABLE INVITATIONS

- Invitation to Sales Manager Roundtable Discussion

\$75,000

## AAAA's V.I.S.I.O.N. Summit & Conference

Participation and Sponsorship of

- AAAA's Annual V.I.S.I.O.N. Conference
  - September 2023
- One day (in-person) Regional Conferences
  - March 2023
  - June 2023
- Virtual V.I.S.I.O.N. – One day (virtual) webcast
  - December 2023

Access to all participation data

525

2022 Attendees

## AAAA MEMBERS DEVELOPMENT PROGRAM SPONSORSHIP

- Next Generation Talent Development Program Sponsorship
  - Expanding opportunities for Black/African American Students into wealth management- Access to participant data
- Sponsorship & Participation in AAAA's Financial Professional Development Programs
  - Black/African American Financial Advisor Development Program -Access to participant data
  - Black/African American Back Office Development Program –Access to participant data
- Ability to host live webinars
- Ability to host regional meetups

## PROMOTION AND BRANDING

- 1 Promotion of Sponsor Brand Social Media  
Social Media Platforms : Facebook, LinkedIn and Twitter
- 2 Branded Email Distribution  
Stay on Brand (AAAA) for Email Distribution  
100 Words or Less + Image
- 3 75 Complimentary Job Postings to AAAA's Job Board & Career Center (Annually)

# SILVER LEVEL MEMBER

## ROUNDTABLE INVITATIONS

- Invitation to Sales Manager Roundtable Discussion

\$50,000

## AAAA's V.I.S.I.O.N. Summit & Conference (Logo placement only)

### Sponsorship of

- AAAA's Annual V.I.S.I.O.N. Conference
  - September 2023
- One day (in-person) Regional Conferences
  - March 2023
  - June 2023
- Virtual V.I.S.I.O.N. – One day (virtual) webcast
  - December 2023

525

2022 Attendees

## AAAA MEMBERS DEVELOPMENT PROGRAM SPONSORSHIP

- Next Generation Talent Development Program Sponsorship (logo placement only)
  - Expanding opportunities for Black/African American Students into wealth management- Access to participant data
- Sponsorship & Participation in AAAA's Financial Professional Development Programs (Logo placement only)
  - Black/African American Financial Advisor Development Program
  - Black/African American Back Office Development Program
- Ability to host live webinars

## PROMOTION AND BRANDING

- 1** Promotion of Sponsor Brand Social Media  
Social Media Platforms: Facebook, LinkedIn, and Twitter
- 2** Branded Email Distribution  
Stay on Brand (AAAA) for Email Distribution  
100 Words or Less + Image
- 3** 50 Complimentary Job Postings to AAAA's Job Board & Career Center (Annually)

# BRONZE LEVEL MEMBER

## ROUNDTABLE INVITATIONS

- Invitation to Sales Manager Roundtable Discussion

\$35,000

## AAAA's V.I.S.I.O.N. Summit & Conference (Logo placement only)

Sponsorship of

- AAAA's Annual V.I.S.I.O.N. Conference
  - September 2023
- One day (in-person) Regional Conferences
  - March 2023
  - June 2023
- Virtual V.I.S.I.O.N. – One day (virtual) webcast
  - December 2023

525

2022 Attendees

## AAAA MEMBERS DEVELOPMENT PROGRAM SPONSORSHIP

- Sponsorship & Participation in AAAA's Financial Professional Development Programs (Logo placement only)
  - Black/African American Financial Advisor Development Program
  - Black/African American Back Office Development Program
- Ability to host live webinars

## PROMOTION AND BRANDING

1

Promotion of Sponsor Brand Social Media

Social Media Platforms: Facebook, LinkedIn, and Twitter

2

AAAA Bi-Weekly Newsletter Sponsor

Logo Placement only

3

35 Complimentary Job Postings to AAAA's Job Board & Career Center (Annually)

# AFFILIATE LEVEL MEMBER

\$20,000

## AAAA's V.I.S.I.O.N. Summit & Conference (Logo placement only)

Sponsorship of

- AAAA's Annual V.I.S.I.O.N. Conference
  - September 2023
- One day (in-person) Regional Conferences
  - March 2023
  - June 2023
- Virtual V.I.S.I.O.N. – One day (virtual) webcast
  - December 2023

525

2022 Attendees

## AAAA MEMBERS DEVELOPMENT PROGRAM SPONSORSHIP



- Sponsorship & Participation in AAAA's Financial Professional Development Programs
  - Black/African American Financial Advisor Development Program
  - Black/African American Back Office Development Program
- Ability to host Live webinars

## PROMOTION AND BRANDING



1

AAAA Bi-Weekly Newsletter Sponsor  
Logo Placement only

2

20 Complimentary Job Postings to AAAA's Job Board & Career Center (Annually)



# SUPPORTER LEVEL MEMBER

\$5,000- 10,000

## AAAA's V.I.S.I.O.N. Summit & Conference (Logo placement only)

### Sponsorship of

- AAAA's Annual V.I.S.I.O.N. Conference
  - September 2023
- One day (in-person) Regional Conferences
  - March 2023
  - June 2023
- Virtual V.I.S.I.O.N. – One day (virtual) webcast
  - December 2023

525

2022 Attendees

## AAAA MEMBERS DEVELOPMENT PROGRAM SPONSORSHIP



- Ability to host Live webinars

## PROMOTION AND BRANDING



1

AAAA Bi-Weekly Newsletter Sponsor  
Logo Placement only

2

Complimentary Job Postings to AAAA's Job Board & Career Center (Annually)

# ALL AAAA CORPORATE MEMBERS AND PARTNERS

## AAAA's V.I.S.I.O.N. Summit & Conference

- Complimentary registration to AAAA's V.I.S.I.O.N. Summits and Conferences.

- Options to Partner with AAAA for three and one year.
- Complimentary memberships for individual members

Please note: *Complimentary memberships and registrations vary by sponsorship level.*

- 1 Logos displayed on AAAA's website.
- 2 Access to AAAA's Job Board.
- 3 Ability to host live webinars for AAAA's members

## A-LA-CARTE CONFERENCE & SUMMIT SPONSORSHIP OPPORTUNITIES

OPTIONS BELOW ARE INCLUDED FOR AMBASSADOR,  
DIAMOND, PLATINUM, AND GOLD LEVEL SPONSORS

Minimum financial commitment of \$10,000



VIP Conference/Summit Event Sponsor x1 -\$50,000  
(2 opportunities available)



Breakout Session Participation & Sponsor x1 -\$50,000  
(4 opportunities available)



Regional Meet-Up Sponsor x1 -\$35,000  
(10 opportunities available)



Participation in Dine Around w/Sponsor Event x1  
-\$25,000  
(3 opportunities available)



Next Gen/Career Changers Recruiting Events x2  
-\$20,000  
(3 opportunities available)



Wifi Sponsor at Lite & Regular V.I.S.I.O.N. Conference  
x1 -\$10,000  
(3 opportunities available)



VISION Conference Shuttle Bus Sponsorship x4 -\$10,000  
(3 opportunities available)

## EXAMPLES OF WAYS TO ENHANCE PARTICIPATION AND MEMBERSHIP

Please note: Minimum financial commitment of \$150,000 must be met prior to electing additional non-financial commitments

### MARKETING

- AAAA Web redesign and data automation  
-\$100,000
- AAAA virtual webcast studio + podcast studio (design, build, training and execution)  
-\$175,000
- Marketing and PR access  
-\$50,000

### IT/TECHNOLOGY

- AAAA's Database Management -\$100,000
- AAAA Web security protocols for email access etc. -\$75,000
- Trading Software  
-\$50,000 for an annual license

### HUMAN CAPITAL

- Sponsor an AAAA employee for 12 months  
-\$100,000

### DATA MANAGEMENT

- Data Analytics and Reporting –Publication  
\$100,000

### LEARNING MANAGEMENT SYSTEM

- AAAA Education and Coaching Platform  
\$100,000

## CORPORATE PARTNER & SPONSOR COMMITMENT FORM

Complete contact information is required. Please print or type.

### PARTNER/SPONSOR CONTACT INFORMATION

<b>Name</b>	<b>Company:</b>	<b>Title</b>
_____	_____	_____
<b>Address 1:</b>	<b>Email:</b>	<b>Phone:</b>
_____	_____	_____
<b>City</b>	<b>State</b>	<b>Zip Code</b>
_____	_____	_____

### RELATIONSHIP MANAGER CONTACT

<b>Name:</b>	<b>Phone:</b>	<b>Email:</b>
_____	_____	_____

### COMPLIMENTARY REGISTRATION PASSES & AAAA INDIVIDUAL MEMBERSHIPS:

All names of firm representatives and members must be submitted by the date specified in the sponsorship agreement. You will receive the information soon after this form is received by AAAA. Any complimentary membership that have not been allocated by the specified deadline will be forfeited.

**Check payments: Must be made payable to and mailed to:**

**Association of African American  
Financial Advisors**

**1050 Connecticut Avenue, SW, Suite 500CC  
Washington , D.C. 20036**

**Cancellation Policy: In the event AAAA  
cancels an event due to unforeseen  
circumstances, AAAA will retain 50% of  
the sponsorship commitment. The  
remaining fees will be credited to the  
sponsorship of one or more future events  
upon AAAA's discretion.**

### Level of Support

- |  |   |
|--|---|
| <input type="checkbox"/> AAAA Ambassador Level           | <input type="checkbox"/> AAAA Diamond Level       |
| <input type="checkbox"/> AAAA Platinum Level             | <input type="checkbox"/> AAAA Gold Level Partner  |
| <input type="checkbox"/> AAAA Silver Level               | <input type="checkbox"/> AAAA Bronze Level        |
| <input type="checkbox"/> AAAA Affiliate Level            | <input type="checkbox"/> AAAA Soft Cost selection |
| <input type="checkbox"/> AAAA Supporter Level (RIA Only) |   |
| <input type="checkbox"/> AAAA Al-la Carte Election Level |   |
| <input type="checkbox"/> AAAA LeCount Davis Scholarship  |   |

**Pledge Amount \$** \_\_\_\_\_

This form and other written confirmation MUST be returned via email to Chelsey Johnson at [Chelsey.Johnson@aaafainc.org](mailto:Chelsey.Johnson@aaafainc.org) and Necho. Carroll@aaafainc.org to confirm your sponsorship, otherwise you will not receive credit. Should you have questions or concerns, please email Chelsey Johnson.



THANK YOU  
FOR YOUR  
SPONSORSHIP  
AND  
PARTNERSHIP

OUR CURRENT PARTNERS AND SPONSORS



# AAAA SOCIAL MEDIA

FOLLOW US!

We will be advertising and sharing content about your firm on our social media platforms. By following us you will have the opportunity to network with our members.

Spread the word and have you and your team follow us on social media so we can build a stronger community.



[Linkedin.com/company/aaafa](https://www.linkedin.com/company/aaafa)



[Instagram.com/quadasocial](https://www.instagram.com/quadasocial)



[Facebook.com/aaafainc](https://www.facebook.com/aaafainc)



[Twitter.com/QuadASocial](https://twitter.com/QuadASocial)



[www.aaafainc.org](http://www.aaafainc.org)

