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Guide to 2025-26 Sponsors

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We help our advisors create more efficient portfolios by leveraging our risk management expertise through non-commissionable and commissionable annuity offerings.

American Century Investments | Avantis Investors

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Founded in 1958 by Jim Stowers Jr. in Kansas City, today American Century Investments is a global asset manager with approximately $262 billion in AUM. American Century is focused on delivering investment results and building long-term client relationships that can improve human health and save lives. It's how we and our clients together Prosper With Purpose.

Avantis Investors, established in 2019 as a fully integrated unit of American Century, was created to deliver financial science-based investment solutions that fit seamlessly into asset allocations and combine the potential for added value with the reliability of indexing. Since inception, Avantis has launched 31 strategies representing $60 billion in assets under management as of March 31, 2025.

Amplify ETFs

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At Amplify ETFs, our goal is to enhance the value of investors' portfolios through a diverse range of actively managed and index-based ETFs. Our ETFs are designed to provide access to attractive income generation, bolster core allocations, and capitalize on transformative growth trends. Our seasoned team utilizes a combination of technical analysis, fundamental research, and quantitative modeling to offer distinctive exposure to various asset classes, sectors, and themes. Aligned with our client-centric approach, we offer educational materials and valuable resources to empower investors in making well-informed decisions. We firmly believe in equipping investors with the knowledge and essential tools required to help navigate the ever-changing investment landscape and capitalize on emerging opportunities.

Axos Advisor Services

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Axos Advisor Services provides solutions to help RIAs stay ahead of their evolving needs. Our integrated custodial, technology, and cash-management solutions enable you to offer a wider range of services. You deserve a partner who understands your business needs and will get to know your goals. We will stand beside you with personalized service and advocate for your success. We're not just a custodian. We're custody evolved. To learn more, visit axosadvisorservices.com.

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Calamos Investments

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At Calamos, we are helping Investment Professionals engage and manage risk via liquid alternatives, private credit, ESG, US small cap, EM equity and active ETFs. We are partnering with advisors in areas of their allocations that require active management.

Capital Group | American Funds

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Cohen & Steers

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Cohen & Steers is a leading global investment manager specializing in real assets and alternative income, including real estate, preferred securities, infrastructure, resource equities, commodities, as well as multi-strategy solutions. Founded in 1986, the firm is headquartered in New York City, with offices in London, Dublin, Hong Kong, Tokyo and Singapore.

Czepiga Daly Pope & Perri

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Emerald Medicare

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Mark conducts 30+ webinars and seminars all year long to passionately educate advisors, planners, social workers and consumers nationally. He has deep roots with the FPA as President of his local chapter and is YOUR local and dedicated independent Medicare Insurance Agent.

Federated Hermes

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Federated Hermes, Inc., is a global leader in active investing, with $829.6 billion in assets under management as of December 31, 2024. At Federated Hermes, we are guided by our conviction that responsible investing is the best way to create wealth over the long term. We aim to help people invest and retire better, to help clients achieve better risk-adjusted returns, and where possible, to contribute to positive outcomes in the wider world.

Our investment solutions span more than 170 equity, fixed income, alternative/private markets, multi-asset and liquidity-management strategies and a range of separately managed account strategies. We provide world-class investment management and engagement services to more than 10,000 institutions and intermediaries including corporations, government entities, insurance companies, foundations and endowments, banks and broker/dealers.

Headquartered in Pittsburgh, Federated Hermes' more than 2,000 employees include those in London, New York, Boston and offices worldwide.

Fenimore Asset Management | FAM Funds

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Fenimore Asset Management is an independent investment advisor driven by in-house research and a value philosophy. As a Trusted Investment Partner managing FAM Funds, we provide high-quality strategies built for the long-term. Solutions for financial planners and advisors include: FAM Value Fund — a core stock strategy for long-term appreciation with a conservative approach; FAM Dividend Focus Fund — structured in mid-cap growing dividend positions for total return; and FAM Small Cap Fund — a concentrated, alpha generating strategy for diversification.

Grayscale

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Grayscale enables investors to access the digital economy through a family of future-forward investment products. Founded in 2013, Grayscale has a decade-long track record and deep expertise as an asset management firm focused on crypto investing. Investors, advisors, and allocators turn to Grayscale for single-asset, diversified, and thematic exposure.

Hartford Funds

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Horizon Investments

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Horizon Investments offers investment management, technology, and consulting tools for investing and advising clients with a goals-based, behavioral framework. Running a business while serving clients can be overwhelming. Our goals-based strategies, consulting solutions, and technology can help advisors focus on what they do best — advising clients through their life journeys.

LoCorr Funds

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LoCorr is committed to providing liquid investment alternatives that will produce returns independently of those generated by traditional asset classes, such as stocks and bonds.

Nationwide Investment Management Group

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Nationwide Investment Management Group ("IMG") is dedicated to serving the needs of institutional investors and enhancing client outcomes. Our philosophy is based on the idea that isolating consistent alpha generation requires discipline and an understanding of the drivers of return. Our process focuses on selecting subadvisers and investment solutions capable of generating returns across market environments.

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PGIM Investments

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At PGIM Investments, we provide access to active investment strategies across the global markets in the pursuit of consistent outperformance for investors.

We're part of PGIM, the global investment management business of Prudential Financial, Inc. — the world's 14th-largest[1] investment manager with more than $1.4 trillion in assets under management (AUM) and a company that individuals and businesses have trusted for over 145 years.

[1] Ranked 14 out of 411 in global AUM based on *Pensions & Investments Top Money Managers* list published on June 10, 2024. This ranking represents assets managed by Prudential Financial as of December 31, 2023.

Professional Life Advisors Network

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Team Cherneski at PLAN focuses exclusively on serving the needs of Financial Planning Professionals. That focus has helped us grow to become the leading choice for Estate, Business and Insurance Planning conversations.

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State Street Global Advisors SPDR ETFs

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Vanguard

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Founded in 1975, Vanguard is one of the world's most respected investment management companies. The firm offers investments; advice and retirement services; and insights to individuals, institutions, and financial professionals. Based in Malvern, Pennsylvania, Vanguard has offices worldwide and manages more than $9.0 trillion* on behalf of more than 50 million clients*. Vanguard operates under a unique, investor-owned** structure and adheres to a simple purpose: To take a stand for all investors, to treat them fairly, and to give them the best chance for investment success.

* As of February 29, 2024.

** Fund shareholders own the funds, which in turn own Vanguard.

Voya Investment Management

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Voya Investment Management delivers actively managed public and private market solutions that drive differentiated outcomes for clients worldwide. Our team of 300+ investment professionals manages $336 billion in assets[1]. We excel at partnering with clients to understand their needs and address challenges in innovative ways, drawing on extensive expertise across fixed income, equity, and multi-asset strategies.

[1] As of 12/31/24. Voya IM assets of $339 billion, as reported in Voya Financial SEC filings, represent revenue-generating assets for which Voya Investment Management LLC and the registered investment advisers it wholly owns has full discretionary investment management responsibility. Voya IM assets of $336 billion are calculated on a market-value basis for all accounts.

Wiggin and Dana

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Wiggin and Dana is a full-service law firm of highly talented, creative and experienced lawyers dedicated to exceeding our clients' expectations every day. With offices in Boston, Connecticut, New York, Philadelphia, Washington, DC, and Florida, we represent clients throughout the United States and globally on a wide range of sophisticated and complex matters.

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