

20 YEARS
AAAA

ASSOCIATION OF AFRICAN AMERICAN
FINANCIAL ADVISORS

SHAPING THE FUTURE

NAVIGATING THE FUTURE OF BLACK WEALTH

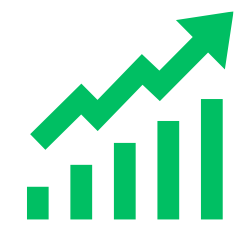
AAAA 2023 NATIONAL V.I.S.I.O.N. CONFERENCE DATA SUMMARY

AAAA'S 2023 V.I.S.I.O.N. CONFERENCE ATTENDEE DATA SUMMARY

01

Conference Registration

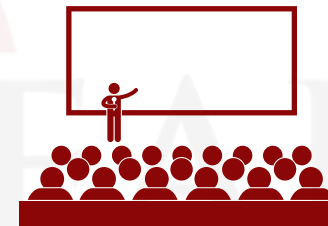
- 1,100+ General Registrations
 - (140+ Executives, 90+ Speakers)
 - (552+ Licensed B/AA Professionals + 322 Next Gen./Career Changers)
- 111% Increase from 2022



02

Conference Session Data

- 55 Sessions
 - 23 C.E. Eligible Breakout Sessions
 - 21 Professional Development Breakout Sessions
 - 11 General Sessions



03

Corporate & Strategic Partners

- 32 Corporate & Strategic Partners
 - 25 Corporate Partners
 - 7 Strategic Partners



04

Career Symposium Data

- 322 Registrations (Next Gen & Career Changers)
 - 23 Colleges & Universities
 - 4 HBCUs in Attendance



***Note:** AAAA's 2023 V.I.S.I.O.N. conferences saw a 111% increase in attendance numbers compared to AAAA's 2022 V.I.S.I.O.N. conference attendance numbers.



2023 CONFERENCE ATTENDEE DATA



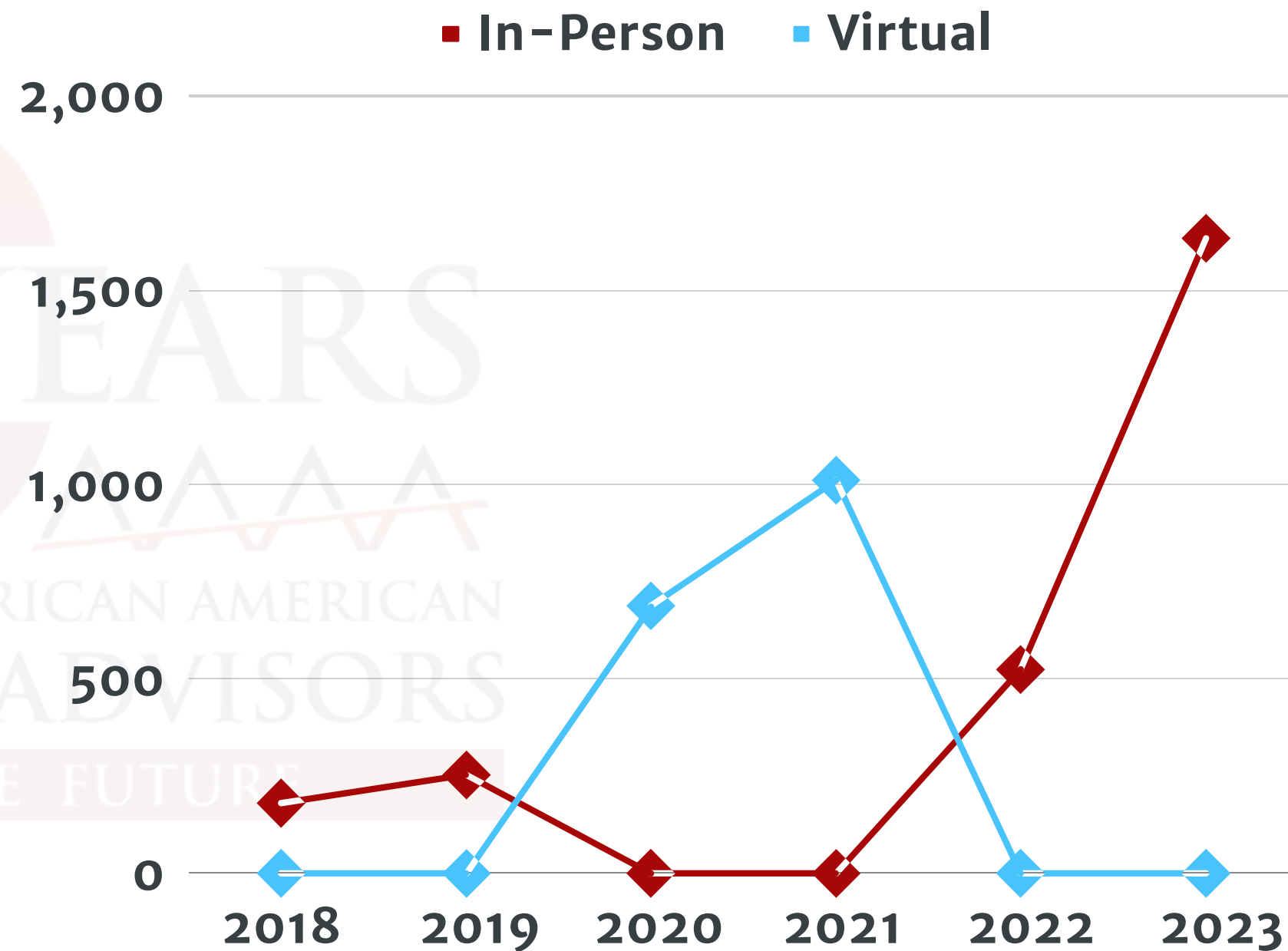
V.I.S.I.O.N. Conference Attendance Growth

Demonstrating the rising prominence and value of AAAA’s professional development conferences, attendance numbers have seen an outstanding leap year over year. For example, in **2022**, AAAA welcomed a substantial in-person audience of **525 attendees** to our annual V.I.S.I.O.N. conference in Atlanta, GA.

In **2023**, AAAA more than doubled it’s record 2022 attendance numbers, with attendance numbers eclipsing of over **1,400 participants** combined*, at AAAA’s regional and annual V.I.S.I.O.N. conferences.

This **111% increase YoY** not only reflects the growing interest in AAAA’s professional development conferences but, also **reinforces our commitment to delivering unparalleled value to our attendees.**

Conference Attendance YoY



*Note: 2023 Attendance numbers include 2 Regional Conferences.

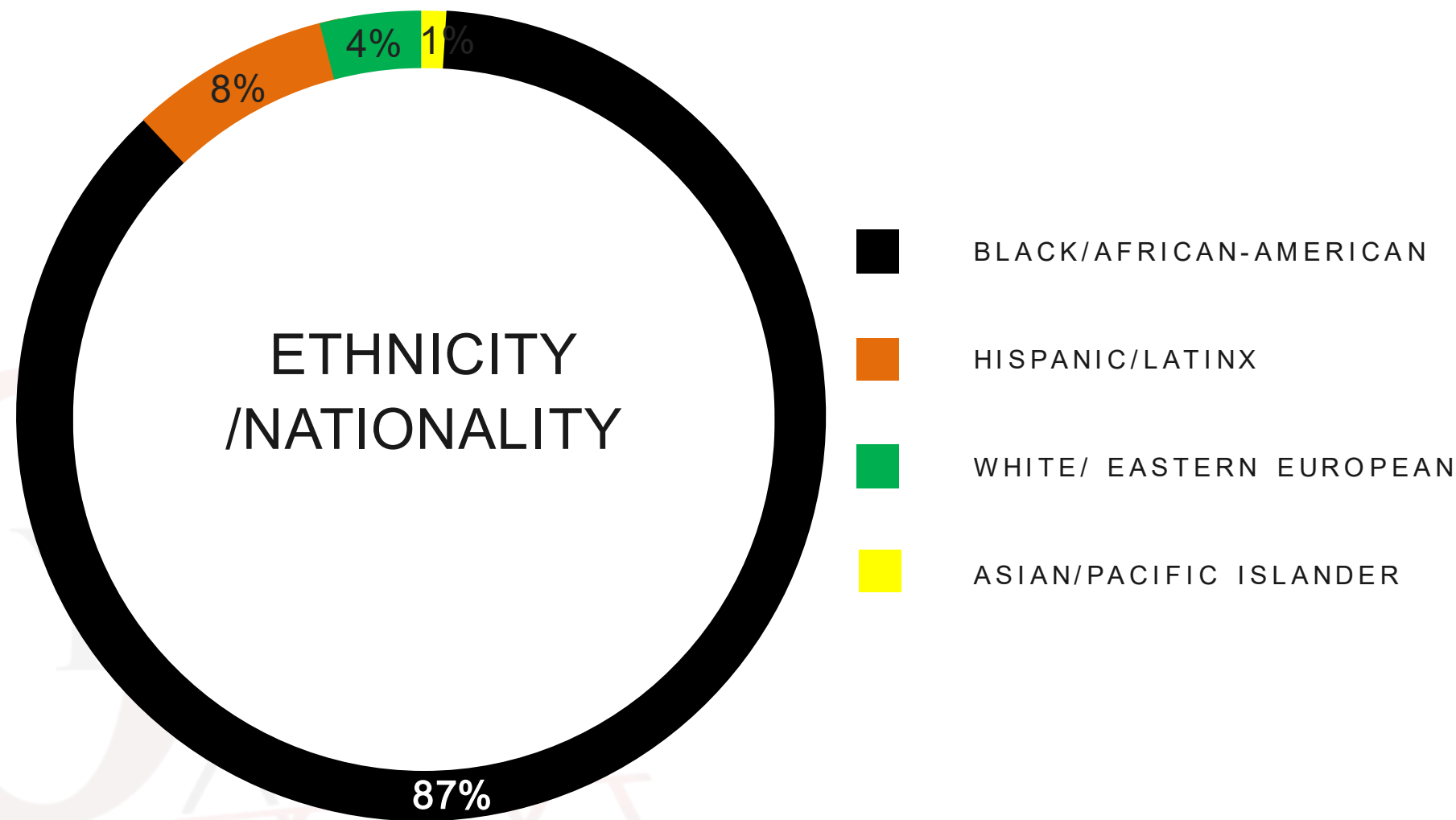
*Note: Virtual Conferences occurred during pandemic years 2020 & 2021.



2023 CONFERENCE ATTENDEE DATA

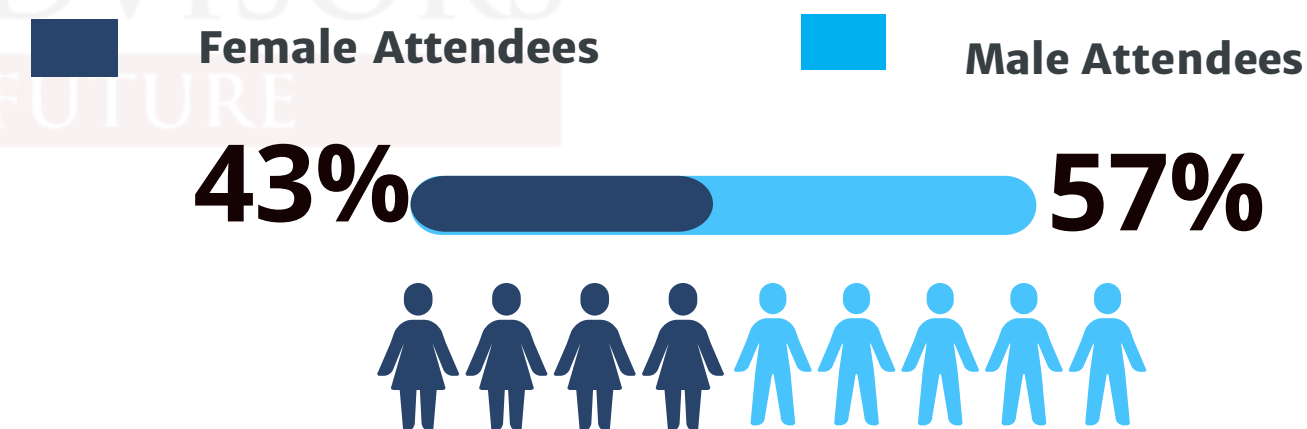
V.I.S.I.O.N. Conference Race/Nationality Data

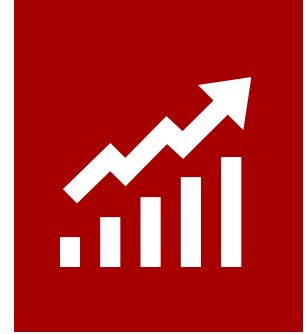
AAAA's V.I.S.I.O.N. Conferences serve as a platform for diverse representation within the Financial Services industry. Demographic data from the attendance shows **87%** were **Black/African-American**, **8%** **Hispanic or Latinx**, **4%** **White/Eastern European**, and **1%** **Asian/Pacific Islander** highlighting a need for a big tent approach to expanding access to the Financial Services Industry.



V.I.S.I.O.N. Conference Gender Data

The gender distribution was notable as well, **43%** of **attendees identified as female**, showcasing the rising influence of black women in the financial sector. **Male attendees** comprised **57%**, emphasizing the continuing role of black male professionals. The data portrays a comprehensive picture of the conference's commitment to inclusivity and the evolving landscape of the industry.

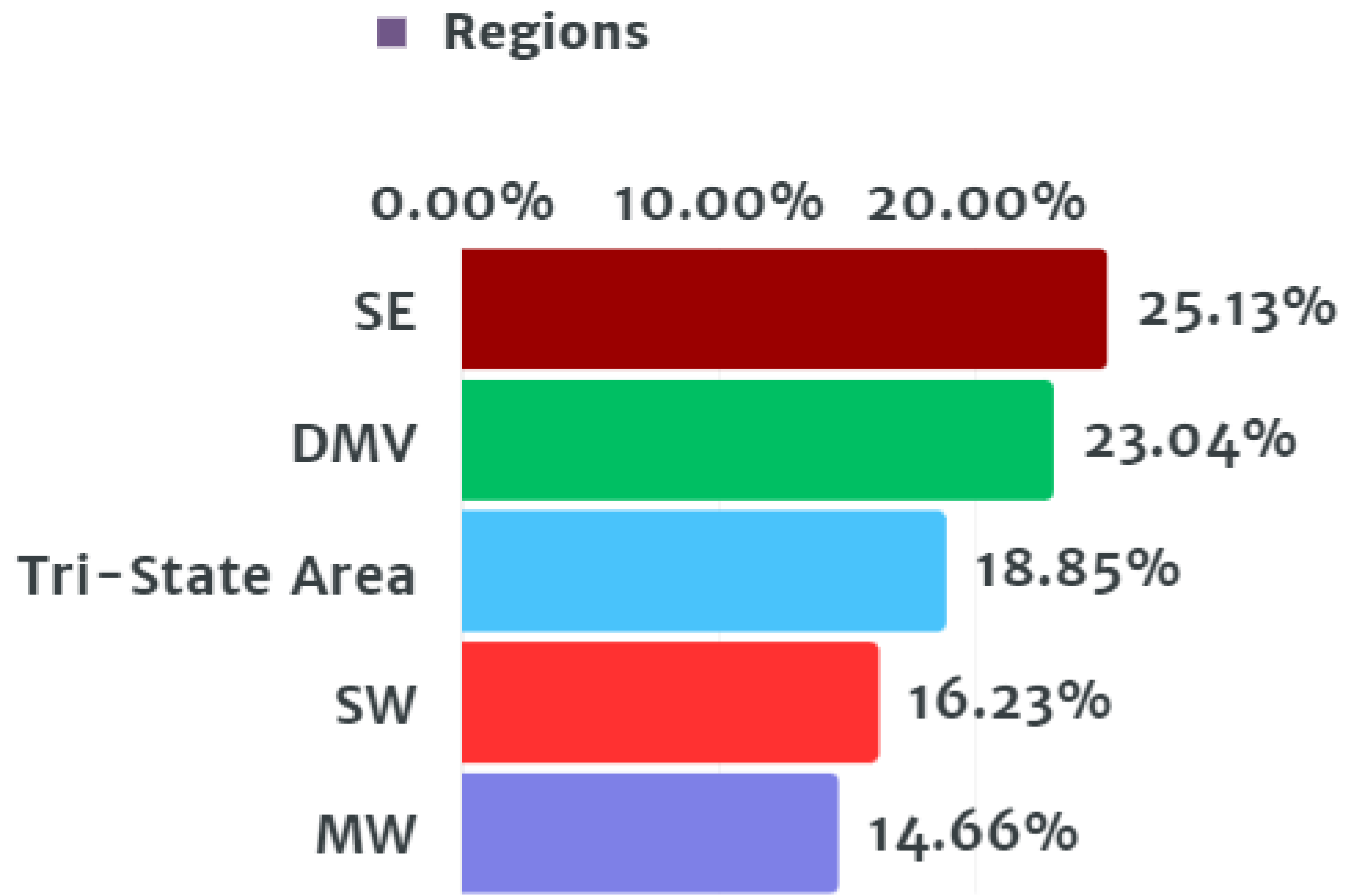




CONFERENCE ATTENDEE Data

Conference Attendance By Region

We observed a diverse regional participation that enriched the overall experience. Leading the pack were attendees from the **Southeast (SE) region**, constituting **25.13%** of the total attendees. They were closely followed by those from the **DMV (DC, Maryland, and Virginia) area**, who comprised **23.04%** of the participants. The **Tri-State Area**, covering **New York, New Jersey, and Pennsylvania**, contributed to **18.85%** of the attendees. Meanwhile, the **Southwest (SW) region** was represented by **16.23%**, and the **Midwest (MW)** brought in **14.66%**.



***Note:** This diverse representation by region not only showcases the extensive reach and influence of the AAAA but also emphasizes the importance of the Annual Conference as a central gathering point for professionals across the country.



2023 CONFERENCE ATTENDEE DATA

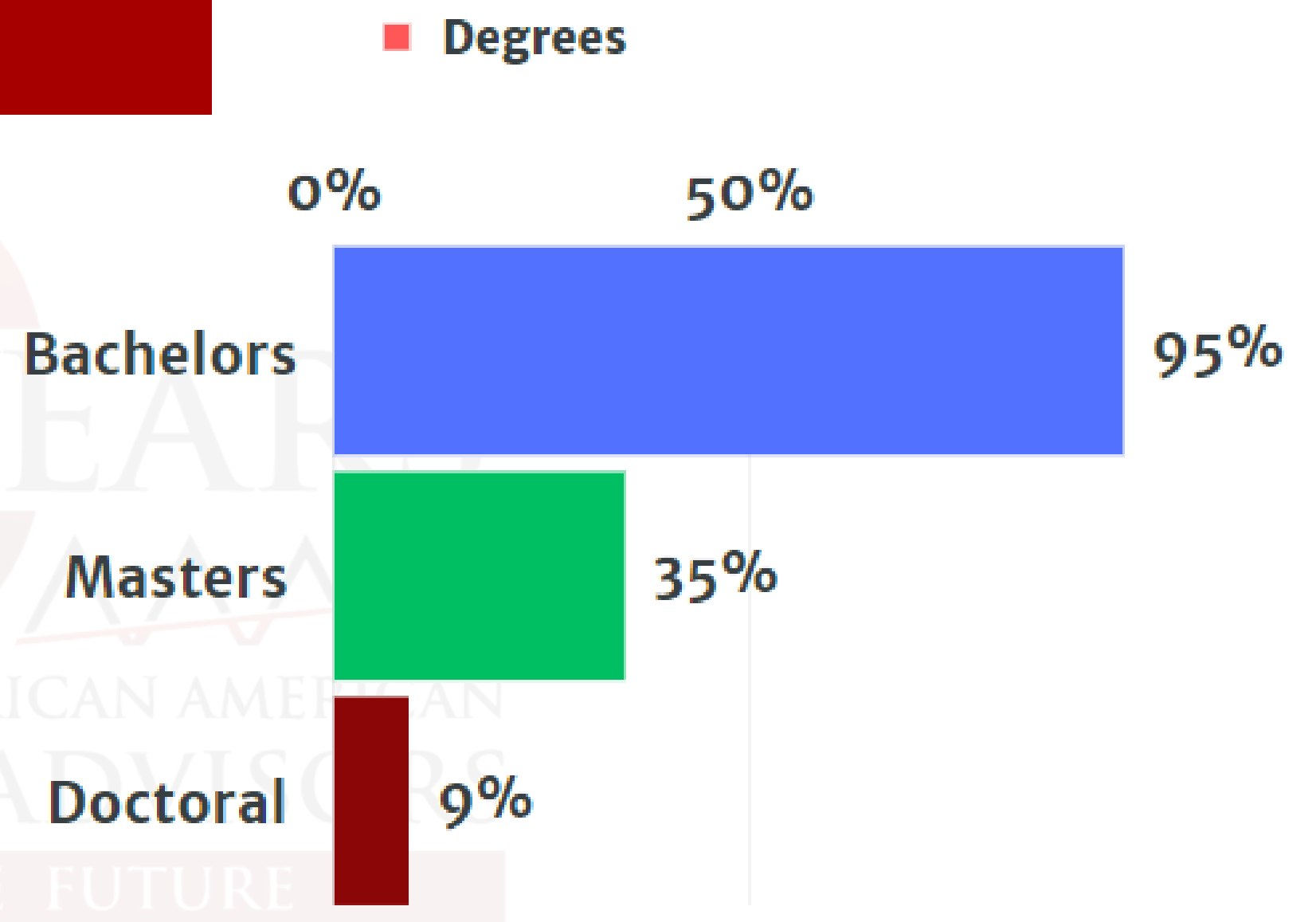


Degrees & Advanced Certifications of Licensed B/AA Professionals in Financial Services

Educational qualifications of AAAA's 2023 V.I.S.I.O.N. conference attendees represent the depth and breadth of academic achievements represented by B/AA professionals in the financial services industry.

A summary of educational attainment shows of V.I.S.I.O.N. conference attendees

- ✓ **95%** hold a **Bachelors degree**
- ✓ **35%** with **Masters degree**
- ✓ **9%** obtained a **Doctoral degree**



***Note:** The presence of these degrees and advanced certifications not only underscores the commitment of our members to continual learning but also emphasizes the value they bring to the industry.



2023 CONFERENCE ATTENDEE DATA



Licenses , Certifications / Designations

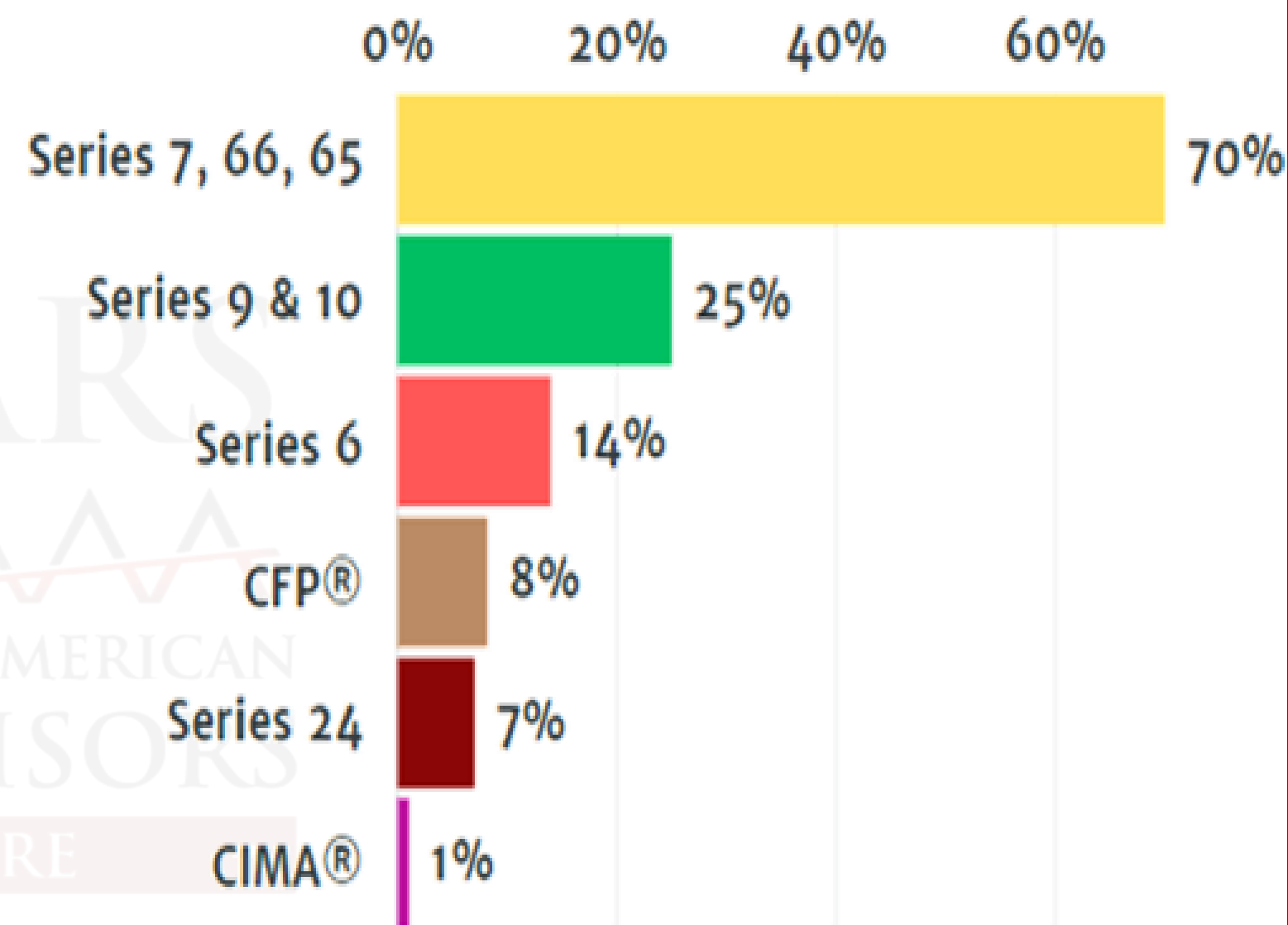
The data aggregated from registration to AAAA’s V.I.S.I.O.N. conferences reveals key insights regarding licensed B/AA Professionals in the Financial Services Industry.

In summary:

- ✓ **70%** of attendees had Series 7, 66, or 65 securities licenses
- ✓ **25%** of attendees had the Series 9 & 10 securities licenses
- ✓ **7%** had the Series 24 securities license
- ✓ **8.2%** had the Certified Financial Planners (CFP®)
- ✓ **1%** of attendees had the Certified Investment Management Analyst (CIMA®) designation.

These data points underscore opportunities available to increase the numbers of B/AA financial professionals eligible for leadership roles in the Financial Services Industry.

■ Licenses, Certifications/Designations

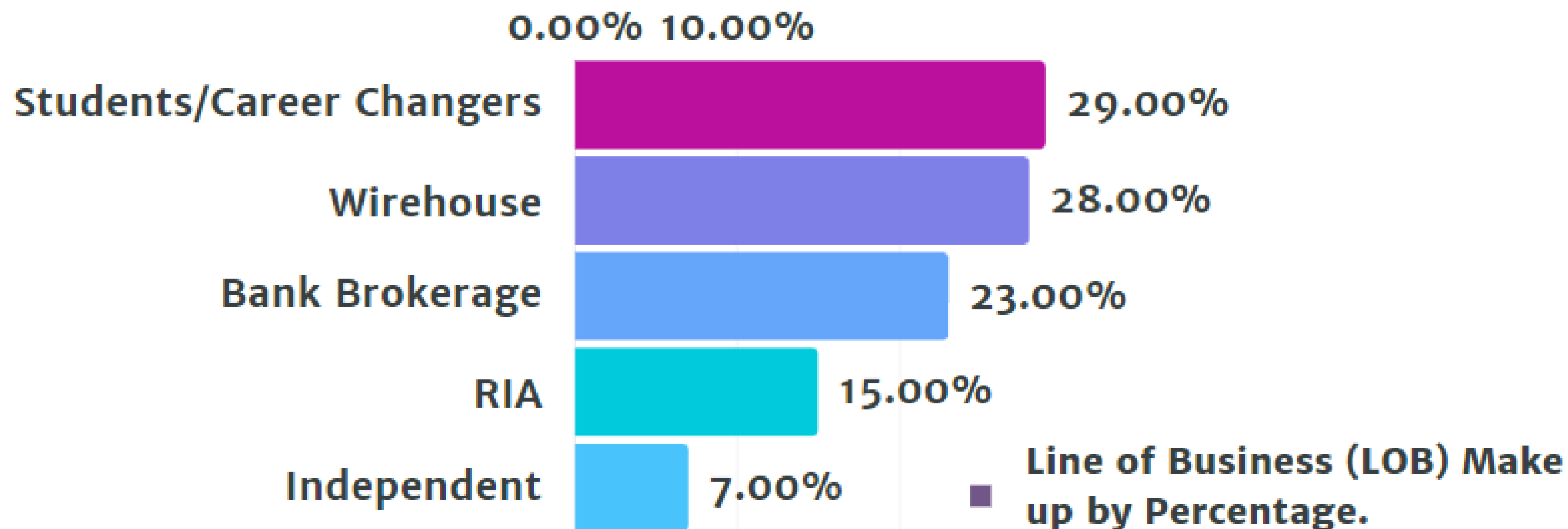


***Note:** AAAA’s network of qualified professionals not only showcases the depth of expertise but also signifies the potential of Black/African American financial advisors in driving strategic industry transformations.



2023 CONFERENCE ATTENDEE DATA

Conference Attendance by LOB



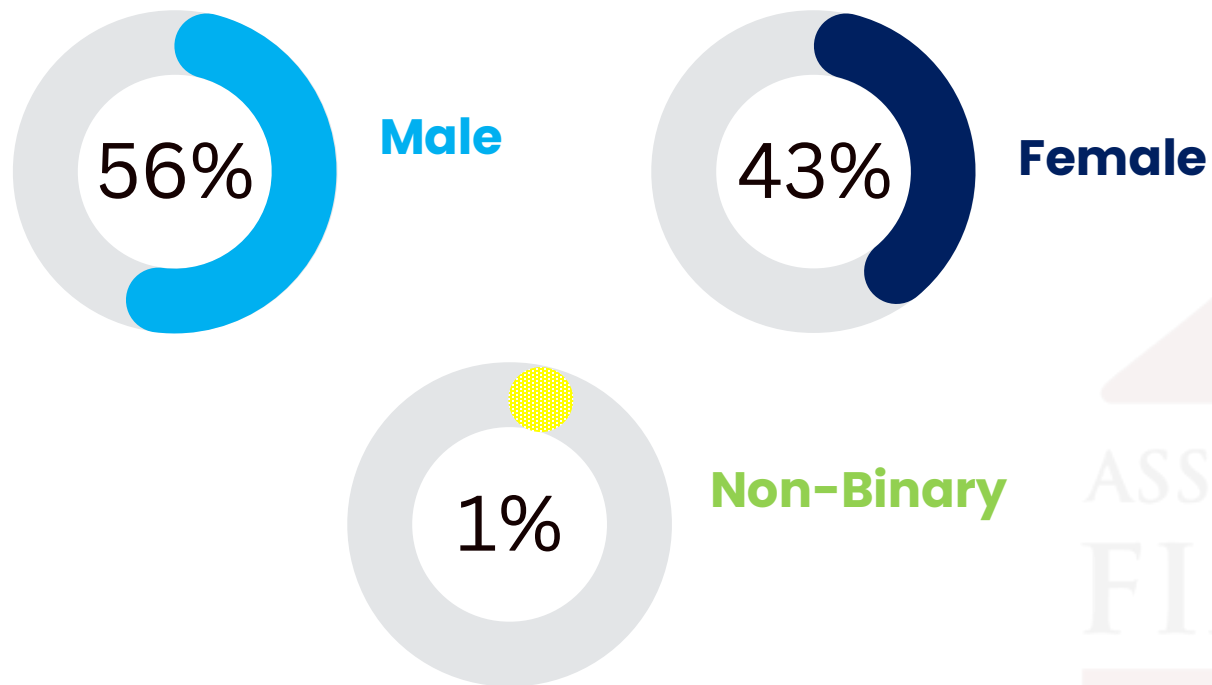
***Note:** This diverse representation by region not only showcases the extensive reach and influence of the AAAA but also emphasizes the importance of the Annual Conference as a central gathering point for professionals across the country.



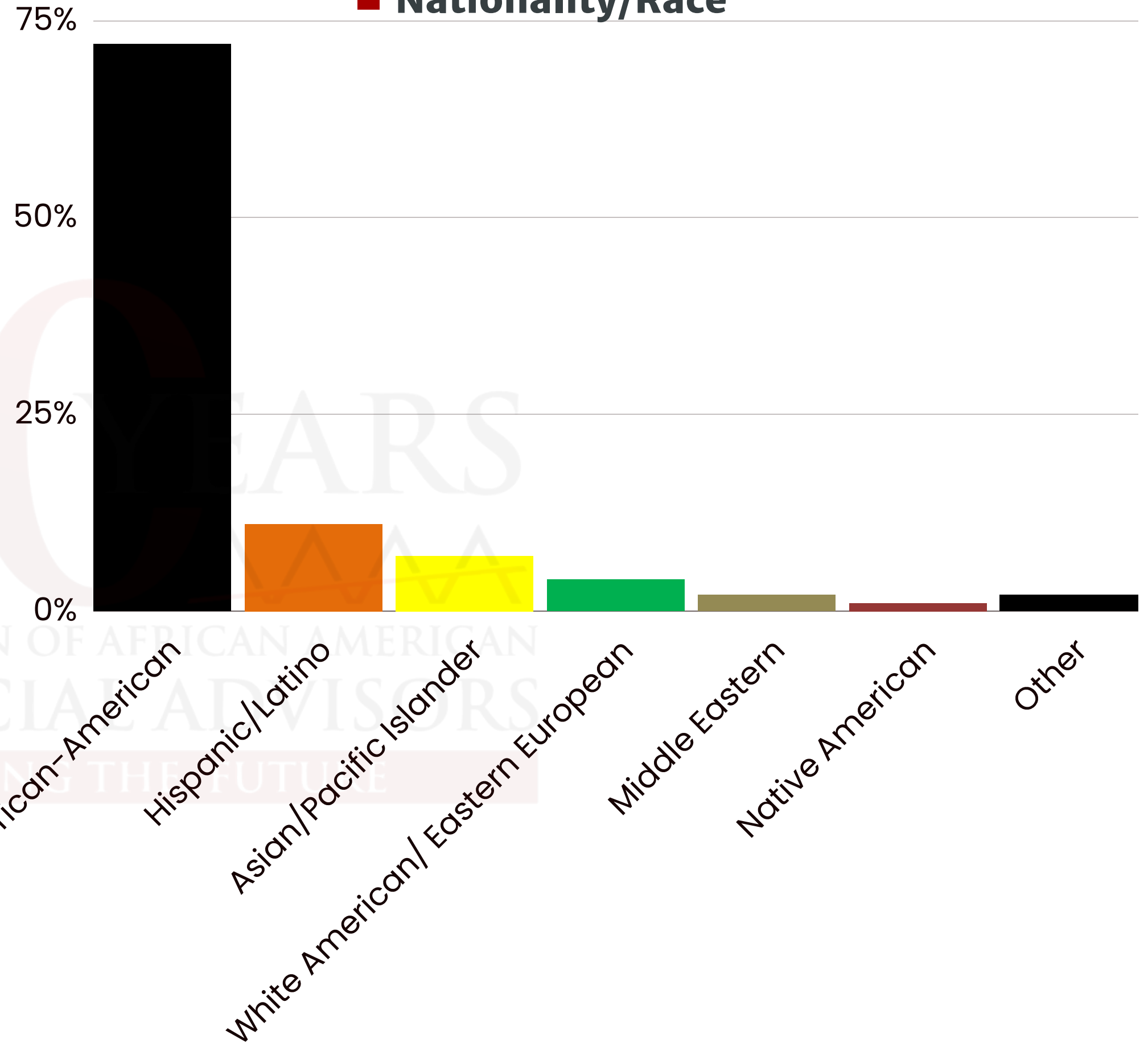
2023 NEXT GEN. ATTENDEE DATA

Career Symposium Data

Gender



Nationality/Race



*Note: The Career symposium gives career changers and next gen. talent opportunities to interact with many of AAAA's corporate Partners.



2023 NEXT GEN. ATTENDEE DATA

AAA V.I.S.I.O.N. conferences attracts a college students and career changers. AAA also reviews majors of students and has tracks majors of students interested in careers in Financial Services.

CHART SUMMARY

A visual of attendance for students and career changers

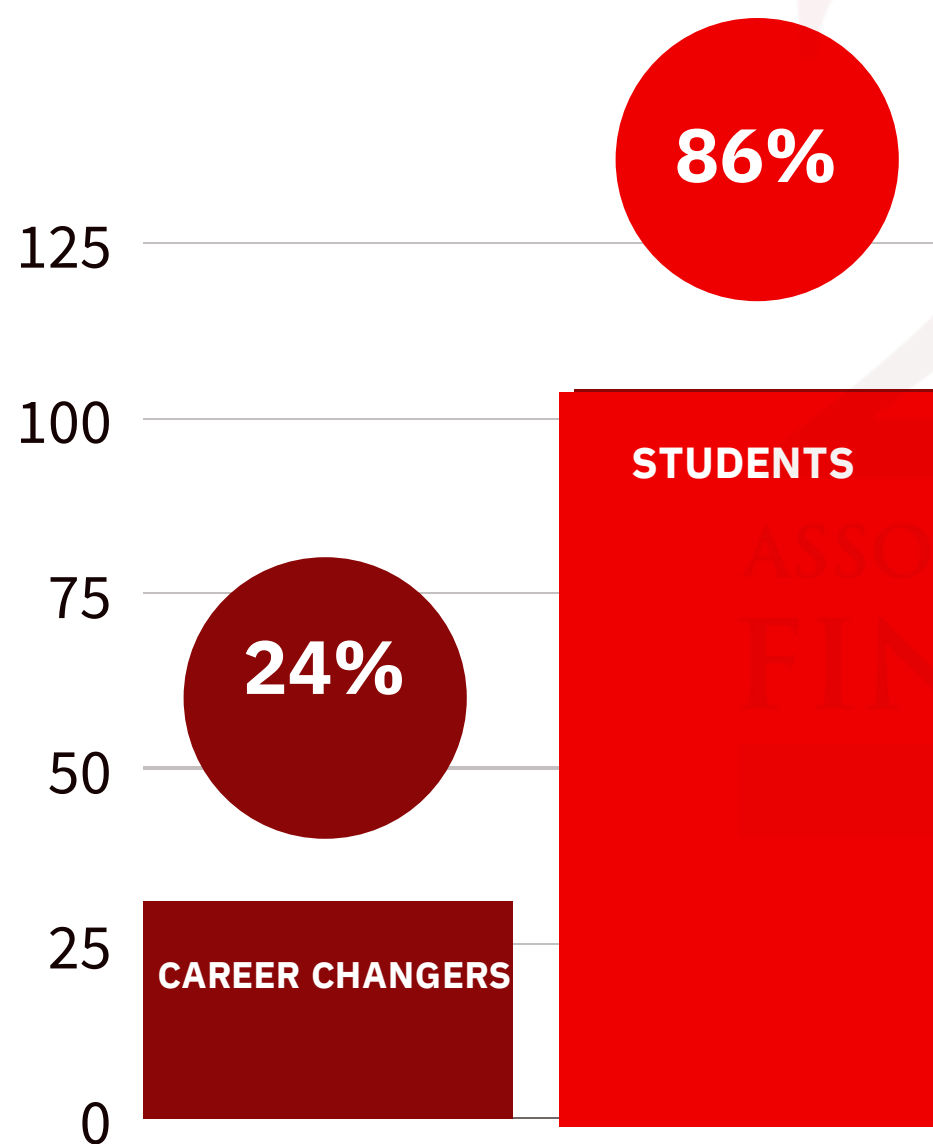
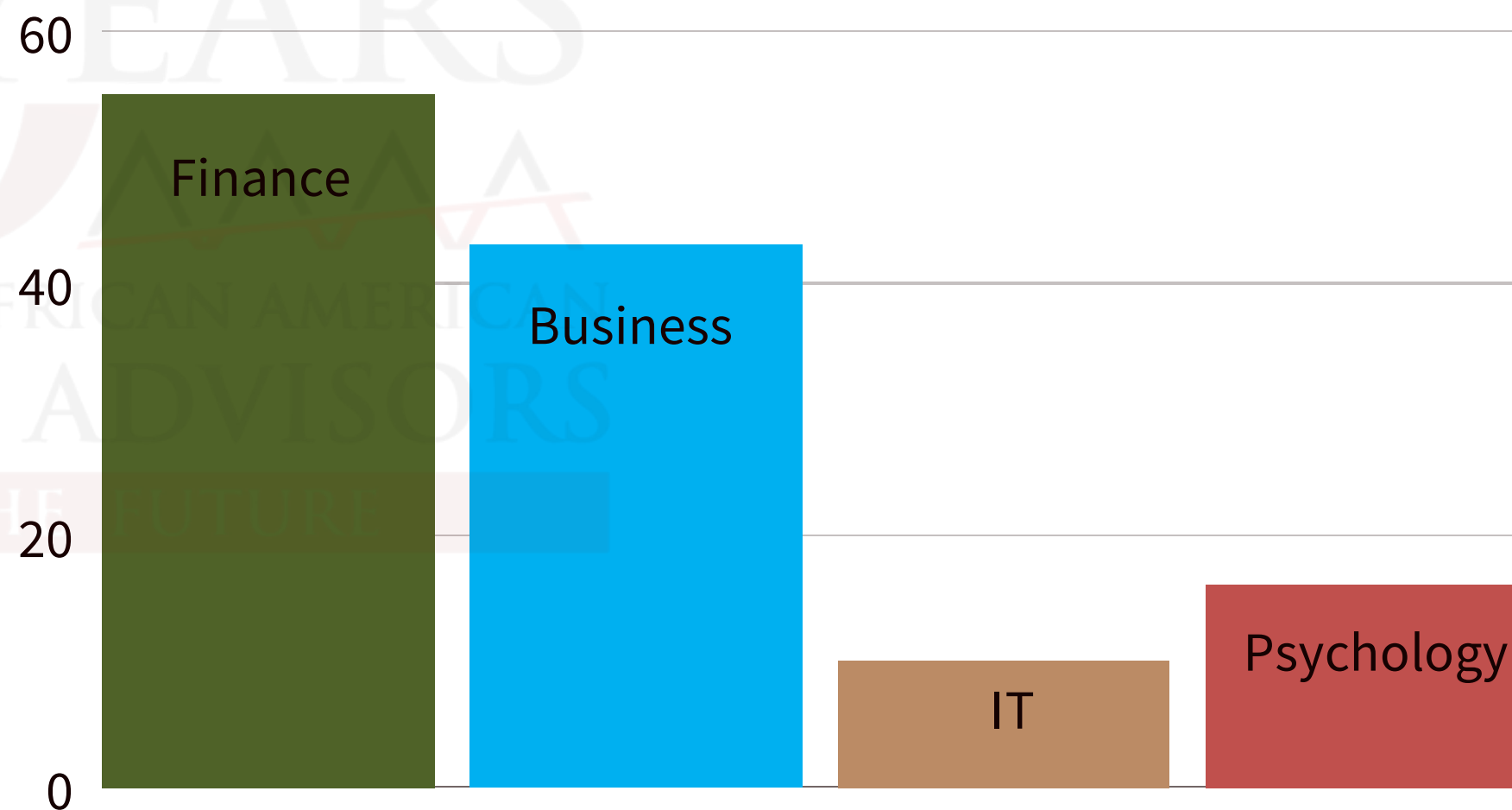


CHART SUMMARY

A visual of College majors represented at AAA's V.I.S.I.O.N. conference by students and career changers





2023 POST-CONFERENCE SURVEY RESULTS ATTENDEE DATA

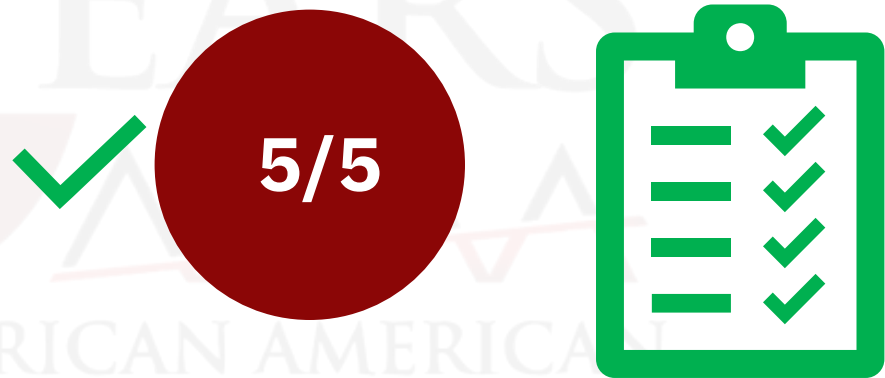


CONFERENCE RATINGS

Overall Conference Experience



Conference Content Is Relevant And Engaging



DO YOU PLAN TO ATTEND FUTURE V.I.S.I.O.N. CONFERENCES?



Recommend Attending V.I.S.I.O.N. Conferences To Your Network



V.I.S.I.O.N. 2023

ANNUAL CONFERENCE

NAVIGATING THE **FUTURE** OF WEALTH
MANAGEMENT FOR **BLACK** AMERICA

- | NETWORKING
- | BUSINESS DEVELOPMENT
- | PROFESSIONAL DEVELOPMENT

SHAPING THE FUTURE OF WEALTH MANAGEMENT.

