



The Heart of Financial Planning™

PHILADELPHIA TRI-STATE AREA

HOW TO ACQUIRE PROFITABLE BUSINESS LEADS

Our association is supported by a number of exceptional sponsors like you who help offset the cost of delivering benefits. You are helping to lead FPA's message of building the community of the financial planning profession, with your commitment to the association, our mission and our members.

Visit our website for information on our mission and vision, as well as detailed information on committee strategies and planned activities:

www.fpaphilly.org

Sponsor Benefits

✓ RECOGNITION

Visibility as a FPA Philadelphia Tri-State Area partner throughout the year at FPA events: 3 member meetings, Spring Symposium, Fall Mini-Retreat and Golf Outing, and quarterly newsletters.

✓ EXPOSURE

To our membership on a consistent basis. The financial professionals you'll meet can help you build long-term business relationships. You will have exposure through the newsletters, on the website, and face-to-face.

✓ EXHIBIT TABLE

Members are continually looking for information on new products and services to meet their clients' needs. Display your materials at our Fall Mini-Retreat and Spring Symposium to a targeted audience. Anticipated attendance of 150 & 250 participants, respectively.

✓ OPPORTUNITIES

You have the opportunity to meet and share your message with attendees at the chapter meetings. It's an excellent time to collect business cards for follow-up marketing.

The Financial Planning Association of Philadelphia Tri-State Area Partnerships are available on a first-come, first-served basis. To reserve your partnership, contact Joe Romano; Vice President of Development at 215-646-1772; or by email at joseph@romanoromano.com.

QuickFACTS

The FPA Philadelphia Tri-State Area has more than 850 financial professional members, representing a broad spectrum of specialties including financial planning, investment management, insurance/annuities, mutual funds, banks/thrifts/trust, law, broker dealer services and accounting. The entire FPA membership totals nearly 28,000 and continues to grow.

FACT Average member age = 52 years old

FACT 60% of members have ten plus years of professional experience

FACT 77% of members are CFP Certificants, 35% are ChFCs, CLUs or CPAs

FACT 68% have at least a Bachelor's Degree
30% have a Master's Degree

FACT Top financial services provided:
67% Retirement planning
65% Investment/Asset management
63% Financial planning
61% Estate planning

FACT You should be involved.

"FPA PHILADELPHIA TRI-STATE AREA MEMBERS ARE A HIGHLY TARGETED MARKET FOR YOUR PRODUCT OR SERVICE."

The Gold and Silver packages offer you an excellent opportunity to be a valued partner of our organization and to reap the rewards of establishing a strong relationship with the premiere financial planning organization in the area and one of the top FPA chapters in the country. We've received the Gold Award for the past two years, the highest award a chapter can receive from National FPA.

Gold Partner

(Package price of \$5,000)

Gold Partners will have a distinct advantage over their competition. **In addition to the Silver benefits**, you will receive:

- Sponsorship and featured speaker at a quarterly meeting (50 minute presentation);
- One email blast to all our members (850+);
- Inclusion of a 1/4 page advertisement in each issue (4) of our quarterly newsletter;
- Annual pass to all 4 member meetings (January, March, July & November); and,
- Opportunity to include an educational article in our newsletter on a mutually agreeable educational topic.

Silver Partner

(Package price of \$3,500)

As a Silver Partner, you will have the opportunity to interact with our membership by:

- Sponsorship of the Annual Spring Symposium- Agenda: full day of educational sessions and keynote speakers. Anticipated attendance: 250+. Benefits: exhibit table, recognition in the program guide, recognition in the quarterly newsletter and chapter website, and a mailing list of attendees;
- Sponsorship of the Fall Mini-Retreat- Agenda: educational sessions in the morning including the CFP® Board-required ethics course followed by an afternoon of golfing. Anticipated attendance: 150+. Benefits: exhibit table, sign recognition of sponsoring one of the golf holes, ability to have one associate play golf with our members, recognition in the program guide, recognition in the quarterly newsletter and chapter website, and a mailing list of attendees;
- Inclusion of a 1/4 page advertisement in two (2) issues of our quarterly newsletter;
- Company logo and a hyperlink from the FPA website to your sponsor website;
- Recognition of sponsorship on our website;
- A set of mailing labels for the entire FPA Philadelphia Tri-State Area membership; and Networking opportunities at the Spring Symposium and Fall Mini-Retreat.

Spring Symposium

SPONSOR OPPORTUNITIES

\$3,500 to sponsor the Keynote Speaker at the Spring Symposium (plus all benefits of Exhibitor Sponsorship listed below)

\$2,500 Spring Symposium Exhibitor Sponsorship- Agenda: full day of educational sessions and keynote speakers. Anticipated attendance: 250+. Benefits: exhibit table, recognition in the program guide, recognition in the quarterly newsletter and chapter website, and a mailing list of attendees;

Fall Mini-Retreat

Fall Mini-Retreat Exhibitor Sponsorship...

Agenda: educational sessions in the morning including the CFP® Board-required ethics course followed by an afternoon of golfing. Anticipated attendance: 150+. Benefits: exhibit table, sign recognition of sponsoring one of the golf holes, ability to have one associate play golf with our members (golf fees are separate), recognition in the program guide, recognition in the quarterly newsletter and chapter website, and a mailing list of attendees.

The following Fall Mini-Retreat sponsorships are also available:

- Hole-In-One Sponsor: cost of personally obtaining hole-in-one insurance for a prize or cash (no exhibition booth)
- Golf Sponsor @ \$1,000: includes the above Fall Mini-Retreat Exhibitor Sponsorship plus the sponsor will separately provide a beverage/snack cart for the day and golf balls/tees for golfers at the sponsor's expense
- Ethics Speaker Sponsor @ \$2,000 (includes all of above Fall Mini-Retreat Exhibitor Sponsorship)
- Keynote Speaker Sponsor @ \$2,000 (includes all of above Fall Mini-Retreat Exhibitor Sponsorship)
- Lunch Sponsor @ \$2,000 (includes all of above Fall Mini-Retreat Exhibitor Sponsorship).

À LA CARTE PRICES

Spring Symposium:

- Keynote Speaker \$3,000
(includes Exhibitor Sponsorship)
- Exhibitor Sponsorship \$2,500

Fall Mini-Retreat

- Hole-in-One Sponsorship ...
Cost of personally obtaining hole-in-one insurance for a prize or cash
- Golf Sponsor of Beverage/snack cart for the day plus golf balls/tees for golfers at the sponsor's expense \$1000 plus costs
Includes all Fall Mini-Retreat Exhibitor Sponsorship benefits
- Ethics Speaker Sponsor \$2,000
Includes all Fall Mini-Retreat Exhibitor Sponsorship benefits
- Keynote Speaker Sponsor \$2,000
Includes all Fall Mini-Retreat Exhibitor Sponsorship benefits
- Lunch Sponsor \$2,000
Includes all Fall Mini-Retreat Exhibitor Sponsorship benefits

*For more details, please see
Benefits At A Glance
in the next attachment*

FPA
FINANCIAL PLANNING ASSOCIATION
The Heart of Financial Planning™