



FINANCIAL
PLANNING
ASSOCIATION

FPA of Spokane



2022 FPA of Spokane Partnership Opportunities

The Financial Planning Association of Spokane would like to invite you to be involved with our organization and our chapter.

The Financial Planning Association (FPA) is the nation's largest and most preeminent organization for financial planning professionals. There are over 27,000 members and over 90 active chapters across the United States.

The FPA of Spokane is over 80 members strong and spans Washington State from the Canadian Border to the Oregon Border and from Central Washington to Western Montana.

The FPA of Spokane members are diverse. They work at brokerages houses and RIAs, mid-sized firms and include many sole proprietors.

Partnership Opportunities Abound – Interaction and exposure to our members in several ways including semi-monthly educational meetings, The Annual Symposium, virtual online events, our FPA website, and The Holiday Social.

See additional information below and/or reach out to Adrienne Ross, CFP®, ChFC®, AFC® our Director of Corporate Sponsorship at Adrienne@mycifp.com or 509-847-4079

What is valuable about Partnering with FPA of Spokane?

- * Meet multiple financial advisors in a short amount of time to build deeper relationships with FPA members
- * Recognition at every Chapter event.
- * Recognition on our website.
- * Attendee list provided for events sponsored.

FPA OF SPOKANE MEMBERS ARE A HIGHLY TARGETED MARKET FOR YOUR PRODUCT OR SERVICE.

Sponsorship offers an excellent opportunity to be a valued partner of our organization and to reap the rewards of establishing a strong relationship with the premier financial planning organization in the Spokane area and one of the top FPA chapters in the country.

SPOKANE FPA 2022 ANNUAL PARTNERSHIP BENEFITS AT-A-GLANCE

BENEFITS	Gold \$1,500	Silver \$750
Partner Presentation at a Chapter Meeting of your choice (first come first serve) Virtual - January, March, September In-Person - May	X 10 Min	
Receive a copy of the attendee list of your attended Chapter Meeting	X	
Opportunity to send one marketing email to the Spokane FPA Chapter database per year	X	
Logo displayed on welcome slide at all Chapter Meetings	X	X
Logo and Contact Information listed on the Spokane FPA Partnerships Webpage	X	X
Website feature on the Spokane FPA website, Partnership Webpage, includes description of products and services	X	X
ANNUAL SYMPOSIUM BENEFITS	Gold	Silver
Annual Symposium Booth, including: <ul style="list-style-type: none"> • Opportunity to mingle with FPA Symposium attendees • Designated table space to display brochures/flyers • Designated partnership break times to allow for table visits 	X	X
Access to pre-event attendee list & post-event attendee list.	X	X
Annual Symposium Sponsor Presentation—5-Min. Time Slot	X	
Opportunity for collateral to be included in symposium packets distributed to all attendees	X	
One complimentary full symposium registration (total of 2 symposium tickets)	X	
2022 ALL-CHAPTER HOLIDAY SOCIAL	\$1,000 - Only 2 Available	
Opportunity to provide either food or drinks for the Spokane FPA All-Chapter Holiday Social & mingle with all members	X	
Present for 10 minutes as a featured sponsor of our social	X	
2 Admission Tickets	X	

Get To Know the FPA of Spokane



The FPA of Spokane has an average of 80 financial professional members, representing a broad spectrum of specialties including financial planning, broker dealer services, insurance/annuities, mutual funds, banks/thrifts/trust, law, CPA's, investment management and accounting and tax specialists. Your promotional activities reach an ideal target audience. The national FPA membership is just over 27,000.

- ✓ 80% of members are over age 40
- ✓ 72% of members have ten plus years of professional experience
- ✓ 71% of members are CFPs 12% are ChFCs 11% are CLUs or CPAs
- ✓ 74% have at least a Bachelor's degree, 23% have a Master's degree
- ✓ Top financial services provided: 77% Retirement Planning; 72% Financial Planning; 70% Investment / Asset Management; 69% Estate Planning
- ✓ Long term involvement equals lasting relationships

FPA of Spokane Leadership

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Letter of Agreement for FPA of Spokane Partners

The undersigned party (herein after "Partner") hereby applies to become a Corporate Partner of the FPA of Spokane chapter under the terms of the "Corporate Partnership Program" (herein after "Program") for the current partnership year. If Partner is accepted to the Program, Partner further agrees to a partnership contract term of one calendar year, payable upfront.

The FPA of Spokane chapter strives to develop quality partnership relationships with partners who have a long-term interest in supporting the financial planning industry. Partner understands that Program has the ultimate right to refuse acceptance to any party without recourse in its pursuit of that goal. All benefits are offered with the understanding that the Partner assumes the responsibility to use the benefits within the calendar year.

The Program limits the number of partners each year. Furthermore, the qualified partners shall represent a cross-section of the industry. In most cases the invitation has been extended to only a few qualified partners in each business category.

Responsibilities of the Partner will include:

- Prompt payment of annual partnership fee
- Active participation in the education of our membership on your company's products and services
- Assume the responsibility to take advantage of the benefits to be used within the calendar year
- Provide company logo and contact information to be used on the FPA of Spokane website and newsletter
- Provide Zoom or booth materials at the Annual FPA of Spokane Symposium

FPA of Spokane may:

- At its sole discretion, accept, deny, non-renew, and/or terminate Partner for cause with no refunds or carry-overs
- Schedule, reschedule, or cancel, at its discretion, meeting dates or presentations and will not be responsible for any partner liabilities, financial or otherwise, arising from such actions
- Change the partnership fee and/or benefits at renewal with a 30-day notice

Partner agrees to the above terms, and hereby applies for a partnership with FPA of Spokane:

Entered into this _____ day of _____, 20_____

Signed by: _____

Signature Printed name _____

Company Name _____

Address, City, State, Zip _____

Phone _____ Email _____ Website URL _____

PAYMENT OPTIONS:

I PLAN TO PAY BY: CHECK Make checks payable to: FPA Spokane CREDIT CARD



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All Corporate Partners

At the FPA of Spokane chapter meetings and at the annual FPA of Spokane Symposium we plan to give each attendee a high quality printed sheet with a listing of all corporate partners: to include logo, contact information, and 3-4 sentences about your company and/or services.

Include the information below that you would like to have printed on this sheet. If you are an existing sponsor we will use the logo we have on file for you. If you are a new sponsor we will be requesting your logo.

*Company Name _____

*Contact name you would like printed on this document / Contact title (if applicable)

*Optional: Additional contact name / Contact title (if applicable)

Phone Email _____ Website URL _____

- If you are a new FPA of Spokane Corporate Partner, or if you are an existing partner and your logo has changed, please send your company logo in high resolution format JPG or GIF to Amy Drury - Chapter Executive fpa@spokanefpa.com.
- If you have associates, internals, marketing reps, etc. that you would like for us to include on our chapter emails please list them here.

3-4 (max) Sentences about your company and/or services (please print legibly):

