

# 2017

## FPA Dallas/Fort Worth Partnerships



**FPA DALLAS/FORT WORTH**

**WWW.FPADFW.ORG**

**972-747-0407**

**PARTNERSHIPS@FPADFW.ORG**

FPA DFW Partnerships are on a first come, first serve basis. To reserve your partnership, please contact Joel Berg – [partnerships@fpadfw.org](mailto:partnerships@fpadfw.org); or Melisa Hall – [execdir@fpadfw.org](mailto:execdir@fpadfw.org), or call 972-747-0407 to get started.

**FPA** OF *DALLAS/FORT WORTH*  
FINANCIAL  
PLANNING  
ASSOCIATION

# OUR VISION FOR OUR PARTNERS:

*To develop a long term and professional and mutually profitable relationship with our sponsor partners and to create an excellent working relationship between our members and partners.*

## QUICKFACTS

The FPA of Dallas/Fort Worth (DFW) has more than 875 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 entire FPA membership totals nearly 23,000.

- ☑ 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  
23% have a Master's
- ☑ Top financial services provided:  
77% Retirement Planning  
72% Financial Planning  
70% Investment / Asset Mgmt.  
69% Estate Planning
- ☑ Long term involvement equals lasting relationships

**"FPA DFW MEMBERS ARE A HIGHLY TARGETED MARKET FOR YOUR PRODUCT OR SERVICE."**

The sponsorship 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 premier financial planning organization in the DFW area and one of the top FPA chapters in the country.

The Financial Planning Association is one of the largest, most active, and most sophisticated financial advisor groups in the country with over 23,000 members and nearly 100 active local chapters. The FPA Dallas/Fort Worth (DFW) Area is widely recognized as a leader in the financial planning community and one of the largest and most successful chapters in the country.

Our chapter is among an elite group that has achieved the highest and most prestigious National FPA recognition for 15 consecutive years (2000-2015), as well as one of a select group to be recognized for the FPA Pinnacle Award.

Our members include financial planners, broker dealers, insurance professionals, attorneys, CPAs and other accounting and tax specialists, investment and trust specialists as well as banking and thrift professionals. Your promotional activities reach an ideal target audience.

The FPA DFW's more than 875+ members are a valuable audience. Members collectively manage substantial investment assets on behalf of clients. Many FPA DFW members are nationally known and active within leading professional groups and societies. FPA DFW members have a wide range of industry experience ranging from seasoned forty or more years to novice first year planners.

## PARTNER BENEFITS

### RECOGNITION

Visibility as a FPA DFW partner throughout the year at all FPA DFW events, in all newsletters, as well as on our website.

### EXPOSURE

You are welcomed to our chapter events and introduced to our membership on a consistent basis. The financial professionals you'll meet through the FPA DFW Chapter can help you build long-term business relationships.

### EXHIBIT TABLE

Members are continually looking for information on new products and services to meet their clients' needs. Platinum and Gold level partners can display your materials at the monthly chapter meetings to a targeted audience.

### 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.

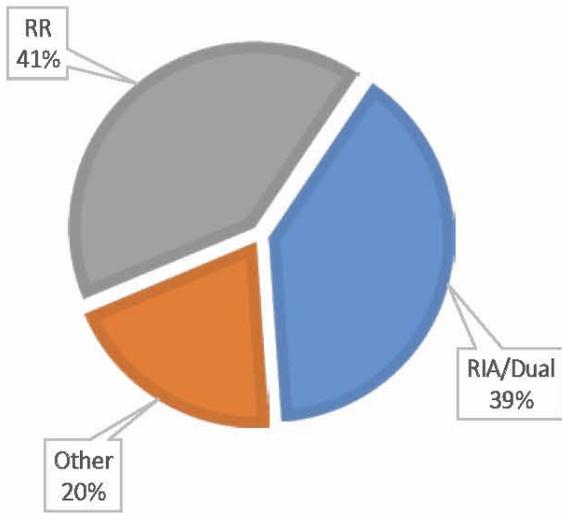
### EXHIBITOR SPACE

Exhibitor space at our two day annual FPA DFW Financial Planning Symposium. Anticipated attendance of 300+ participants.

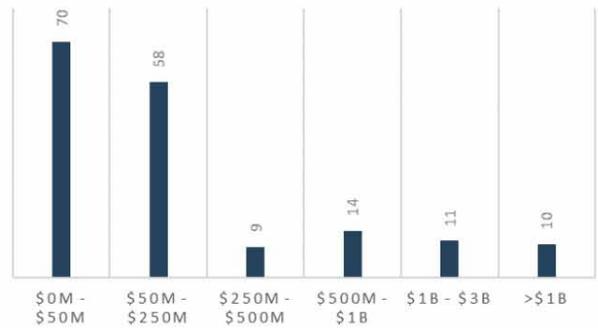


# FPA Dallas Membership Highlights

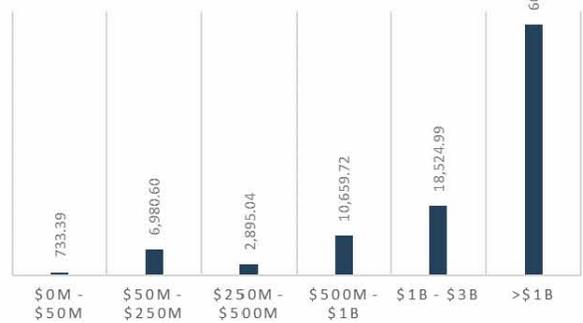
Member Breakout  
Total Members: 844



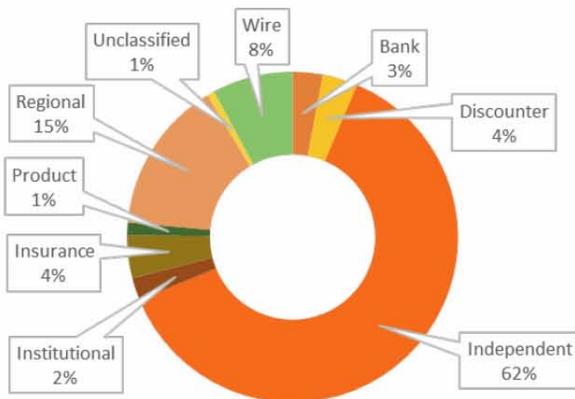
RIA Firm Count By Asset Size  
Total: 172 Firms



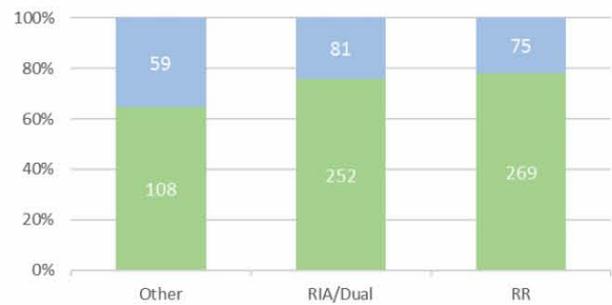
RIA Firm AUM By Asset Size  
Total: \$106.5B



B/D Channels  
Total Members 407



Gender Analysis by Advisor Type



Top Ten Independent B/Ds



Membership by CFP® Designation



	<b>BENEFITS</b>	<i>Value</i>	<b>Double Platinum Limit 1 \$8,500</b>	<b>Platinum Limit 8 \$6,000</b>	<b>Gold Limit 10 \$4,500</b>	<b>Silver Unlimited \$3,500</b>	<b>Non-Profit Level Limit 3 \$2,500</b>
	<b>FPA DFW Sponsor Appreciation Event – Fall 2017</b>		•	•	•	•	•
1	10 min. Sponsor Spotlight at the 2017 Symposium & 1 FPA DFW Chapter Luncheon	\$500	•				
2	Keynote Speaker – Presenting Sponsor at 2017 Symposium	\$2,000	•				
3	Partner of the Year Award	\$2,000	•	•	•		
4	Recognition as a partner with a luncheon table 'tent card' and partner table with marketing materials at all chapter meetings, with RSVP	\$900	•	•	•		
5	Advocacy Program: Partner with a DFW Board member for the calendar year to help with strategic introductions	\$600	•	•	•		
6	Promotion of any CE conference or event that your company is offering	\$500	•	•	•		
7	Three Full Page Ads – Double Platinum Two ½ Page ads – Platinum One ½ Page ad – Gold & Non-Profit	\$1,050 \$360 \$180	•	•	•		•
8	<b>Premium</b> exhibit space for Symposium	\$3,500	•	•			
9	Six blast emails a year	\$1,500	•	•			
10	Major Event Co-Sponsor	\$2,500	•	•			
11	One feature article in monthly newsletter	\$300	•	•			
12	50 Minute Educational Speaker at Chapter Luncheon Meeting	\$500	•	•			
13	Sponsor/host a Study Group session	\$500			•		
14	Two Blast Emails a Year	\$500			•		
15	Minor Event Co-Sponsorship	\$1,000			•		
16	Quarterly access to our DFW membership list	Priceless	•	•	•	•	•
17	<b>Symposium Exhibit</b> space	\$3,000	See #3	See #3	•	•	•
18	Five lunch meeting invitations	\$175 ea.	2 per meeting	2 per meeting	1 per meeting	1 per meeting	n/a
21	Year, long listing on website (link to your website)	\$500	•	•	•	•	•
22	Regular recognition as Corporate Partner	Priceless	•	•	•	•	•

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## BENEFITS OF PARTNERING WITH FPA DFW

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

Visit our website at: [www.fpadfw.org](http://www.fpadfw.org)

For information on our mission and vision, as well as detailed information on planned activities.



## Letter of Agreement for FPA DFW Corporate Sponsors

The undersigned party (herein after "Partner") hereby applies to become a Corporate Partner of the FPA Dallas/Fort Worth 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 Dallas/Ft Worth chapter (herein after "FPA DFW") 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 in a given 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 PARTNERS:

#### Responsibilities of the Partner will include:

- Prompt payment of annual partnership fee (\$ based on level selected)
- 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, website address, contact name, phone and email for website and newsletter listings
- Provide booth materials and set up at the annual FPA DFW Financial Planning Symposium

#### FPA DFW 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

# SPONSORSHIP LEVELS FOR 2017

*We want your relationship with FPA DFW to be successful, and your PARTICIPATION in our Chapter is the key! Get involved by volunteering, attending all monthly meetings and working on committees! The more you put in, the more you'll get out.*

## FIVE LEVELS OF PARTNERS:

### **I. Double Platinum Partners – Limited to 1 – Double Platinum and Platinum levels are the highest level of FPA DFW Partnership.**

#### **Eligibility requirements for Double Platinum Partners:**

- Priority will be given to the prior Double Platinum/Premier/Preferred Partner in the previous year.
- The prior year Double Platinum Partner will have until December 1st to return the signed agreement. After December 1st, this level of sponsorship will be given to the first new sponsor that submits a completed signed Agreement. If there is a conflict, the Board will decide via a majority vote.

### **II. Platinum Partners – Limited to 8 – Double Platinum and Platinum levels are the highest level of FPA DFW Partnership.**

#### **Eligibility requirements for Platinum Partners:**

- Priority will be given to a prior Platinum/Premier/Preferred Partner in the previous year.
- Priority will be given to those who have actively served on a committee or on the Board in the previous year.
- Sponsors will have until December 1st to return the signed agreement. After December 1st, remaining sponsorships will be given to the first new sponsors that submit a completed signed Agreement. If there is a conflict, the Board will decide via a majority vote.

#### **Double Platinum & Platinum Partner Benefits: Please see Chart (page 4) for all Benefits**

- One 50 minute presentation of quality CE related material at a regular monthly meeting or at a breakout session at the Spring Symposium event, subject to approval by the Program Committee, and Bio and Outline must be delivered to the Programs Committee by the announced due date. The Double Platinum partner receives a keynote speaking spot at the annual FPA DFW Symposium
- 10 minute sponsor spotlight at a chapter luncheon meeting.
- Priority Reserved Booths at Symposium Events.
- Display at any chapter luncheon meeting during the calendar year.

### **III. Gold Partner – Limited to 10**

#### **Eligibility requirements for Gold Partners:**

- None.

#### **Gold Partner Benefits: Please see Chart (page 4) for all Benefits**

- Exhibit Table at the FPA DFW Symposium.
- Company Logo and Representative Information listed in Attendee Handouts for all chapter programs.
- 10 minute sponsor spotlight at a FPA DFW Board of Directors meeting.

**IV. Silver Partner – Unlimited** – This level of sponsorship may include both industry related and service related sponsors. No presentation time is associated with this level of sponsorship.

#### **Eligibility requirements for Silver Partners:**

- None.

#### **Silver Partner Benefits: Please see Chart for all Benefits**

- Booth Display at the FPA DFW Symposium.
- Company logo and Representative Information listed in monthly Newsletter.
- Firm's logo and website link on chapter website.

**V. Non-Profit Partner – Limited to 3** – This level of sponsorship may include, Certified Financial Planning Programs, Schools, Universities and/or non-profit (501c3) industry related and service related sponsors. No presentation time is associated with this level of sponsorship.

**Eligibility requirements for Non-Profit Partners:**

- ❑ All non-profit sponsors must be a 501c3 organization.

**Silver Partner Benefits: Please see Chart for all Benefits**

- ❑ Booth Display at the FPA DFW Symposium. (CFP Programs/Universities may elect to use this benefit at the annual Symposium OR at the annual Career Day event – we will go over both options with you).
- ❑ Company logo and Representative Information listed in monthly Newsletter.
- ❑ Firm's/School's logo and website link on chapter website.

*If you would like to discuss partnership opportunities in greater detail, please contact Joel Berg, FPA DFW Partnerships Director, at 214-363-4200 or [partnerships@fpadfw.org](mailto:partnerships@fpadfw.org). If you would like to discuss any other questions regarding our chapter, please contact Melisa Hall, at 972-747-0407 or [execdir@fpadfw.org](mailto:execdir@fpadfw.org). All Partnership Packages are based on the 2017 calendar year. FPA DFW reserves the right to require all membership literature, correspondence and ad submissions to conform to our policies and format regulations, and may require all sponsor speaker presentations be eligible for quality CE credit, as well as speaker outlines, bios and handouts be submitted by the requested due date in order to be eligible for a sponsor speaker presentation time for the monthly meetings, the Symposium or any other speaking event.*



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

Entered into this \_\_\_\_ day of \_\_\_\_\_, 20\_\_

Signed by:

\_\_\_\_\_  
Signature Printed name

\_\_\_\_\_  
Company Name – as you want it listed on the website and in newsletters

\_\_\_\_\_  
Address City State Zip

\_\_\_\_\_  
Phone Email

\_\_\_\_\_  
Website (to be linked to FPA DFW website)

\* If you are a new FPA DFW Corporate Partner, or if you are an existing Partner and your logo has changed, please send your company logo to Melisa Hall, FPA DFW Executive Director, at [execdir@fpadfw.org](mailto:execdir@fpadfw.org) in JPG or GIF format.

\* If you have associates, internals, marketing reps, etc that you would like for us to include on our chapter emails please list them here.

\_\_\_\_\_  
Printed Name E-Mail

\_\_\_\_\_  
Printed Name E-Mail

Select	Description	Unit Price
<input type="checkbox"/>	FPA DFW <b>Double Platinum</b> Partnership	8500.00
<input type="checkbox"/>	FPA DFW <b>Platinum</b> Partnership	6000.00
<input type="checkbox"/>	FPA DFW <b>Gold</b> Partnership	4500.00
<input type="checkbox"/>	FPA DFW <b>Silver</b> Partnership	3500.00
<input type="checkbox"/>	FPA DFW <b>Non-Profit Level</b> Partnership	2500.00

**PAYMENT OPTIONS**

**Check one:**  I plan to use 2016 monies  I plan to use 2017 monies

**Check one:**  Check enclosed  Check will be mailed  Paying by credit card

Credit Card Type: AMEX VISA MC Name on card \_\_\_\_\_

CC Number \_\_\_\_\_ Exp date \_\_\_\_\_ CSC# \_\_\_\_\_

**Fax this form to: 972-747-0409 / or email to: [execdir@fpadfw.org](mailto:execdir@fpadfw.org)**