

## 2018 Sponsorship Benefits At-a-Glance

		<b>PLAT \$5000</b>	<b>GOLD \$4000</b>	<b>SILVER \$3000</b>
		<b>LIMIT: 10</b>	<b>UNLIMITED</b>	<b>UNLIMITED</b>
1	One 50 Minute Presentation at a monthly meeting or Spring Symposium*	X		
2	Priority reserved Booths at the Symposia in the best location	X		
3	Display of one Partner event on chapter calendar per month	X		
4	Partner Logo in Rotating Carousel on front page of website	X		
5	Facilitated introductions to chapter members	X	X	
6	One Partner Ad on web-site every six months – format enforced	X	X	
7	One booth next to Registration Desk at Monthly Meeting	X	X	
8	Receive one copy of Attendee List for monthly meetings	X	X	
9	One Email Blast subject to FCC Rules	X	X	
10	One Email Blast subject to FCC Rules announcing hosted webinar conducted and managed by Partner	X	X	
11	One featured education article in monthly newsletter or on website, content subject to approval	X	X	
12	Invited to all FPA NCA Member Socials	X	X	
13	Attendance to New Member Receptions and Orientations	X	X	
14	Two Representatives at all meetings – meals included	X	X	
15	Access to Plum Benefits website for discounted concert, theatre, sporting events tickets	X	X	
16	Marketing insert in Attendee Winter Symposium Materials	X	X	
17	Two representatives at Winter Symposium – all meals included	X	X	
18	Exhibit Table at Winter Symposium	See 2 above	X	
19	Receive one copy of attendee list for Winter Symposium	X	X	
20	Two sets of Membership Mailing Labels	X	X	
21	Reserved Seating at Members Luncheon Tables	X	X	X
22	Marketing insert in Attendee Spring Symposium Materials	X	X	X
23	Receive one copy of attendee list for Spring Symposium	X	X	X
24	One Representative at all meetings – meals included	See 14 above	See 14 above	X
25	Distribute brochures/research at Monthly Meetings	X	X	X
26	Firm, logo, representative presented on screen at all events	X	X	X
27	Firm name, logo, rep. & contact info on website & Newsletter	X	X	X
28	One set of Membership Mailing Labels	See 20 above	See 20 Above	X
29	Receive all email announcements sent to membership, including Newsletter copy	X	X	X
30	Exhibit Table and Two Representatives at Spring Symposium with all meals included	X	X	X

**We want your relationship with the FPA NCA 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.**

# SPONSORSHIP LEVELS FOR 2018

## 3 LEVELS OF PARTNERSHIP:

### I. Platinum Partners – Limited to 10 – This is the highest level of FPA NCA Partnership.

#### Eligibility requirements for Platinum Partners:

- ★ Priority will be given to:
  - Prior Platinum/Premier/Preferred Partner (previous year)
  - Sponsors actively serving on a committee or on the Board in the previous year.

#### Platinum Partner Benefits: See Chart for all Benefits

- ★ \*One 50 minute presentation of quality CE related material at a regular monthly meeting or 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.
- ★ Priority Reserved Booths at Symposium Events.
- ★ Display of one Sponsor event on chapter calendar per month.

### II. Gold Partner – Unlimited

#### Eligibility requirements for Gold Partners:

- ★ None.

#### Gold Partner Benefits: Please see Chart for all Benefits

- ★ Exhibit Table at both Symposium events.
- ★ Company Logo and Representative Information listed in Attendee Handouts for all chapter programs.
- ★ Marketing insert in Attendee Symposium Materials if submitted on time by publishing date.

### III. 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 Spring Symposium
- ★ Membership list/labels
- ★ Company logo and Representative Information listed in monthly Newsletter
- ★ Firm's logo and website link on chapter website

#### All Partnership Packages are based on the 2018 calendar year.

\*FPA National Capital Area 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.

#### To Discuss Partnership Opportunities Contact:

Lisa Kirchenbauer  
(703)387-0919x500, [Lisa@OmegaWealthManagement.com](mailto:Lisa@OmegaWealthManagement.com)  
or  
Carl Holubowich  
(202)887-8135, [CHolubowich@AFMFA.com](mailto:CHolubowich@AFMFA.com)

#### Other Questions:

Peggy Nelson  
Executive Director  
FPA NCA  
703-620-1712  
[Peggy@FPANCA.org](mailto:Peggy@FPANCA.org)

The undersigned hereby applies to become a Partner of the Financial Planning Association of the National Capital Area chapter (FPA NCA) under the terms of the Partnership Program. If Partner is accepted, Partner further agrees to a partnership contract term of January 1<sup>st</sup> through December 31<sup>st</sup>, payable in advance.

The FPA NCA strives to develop quality partnership relationships with sponsors who have a long-term interest in supporting the financial planning industry. Partner understands that FPA NCA 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 benefits within the calendar year.

## RESPONSIBILITIES OF PARTNERS

### Responsibilities of partners will include:

- Prompt payment of annual partnership fee. Refer to Benefits at a Glance sheet for payment amounts.
- Actively participate 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 calendar year.
- Provide company logo, website address, contact name, phone and email for Newsletter/website listings.

### FPA NCA 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 fees and/or benefits at renewal with a 30 day notice.

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

Agreement entered into this \_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_ .

\_\_\_\_\_  
*Signature* *Printed Name*

\_\_\_\_\_  
*Company Name – as listed on website & newsletters*

Partner to be listed in the newsletters: \_\_\_\_\_

\_\_\_\_\_  
*Email Address* (\_\_\_\_) \_\_\_\_\_  
*Phone*

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

Toll Free Number \_\_\_\_\_ Fax \_\_\_\_\_ Website \_\_\_\_\_

Level of Sponsorship:      Platinum      Gold      Silver

Three Top Speakers and topics that you would recommend to FPA NCA for a great program:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_