

Financial Planning Association of Georgia

Partnership Opportunities

2018



^{OF} *GEORGIA*

About FPA of Georgia

Thank you for your interest in becoming a Partner. We exist to support, promote and empower the financial planning community of Georgia. Our partnership program is designed to provide an opportunity for a select group of industry-leading firms to interact with our members during educational meetings, socials and community outreach activities.

The Georgia chapter has over 600 dedicated member professionals who serve consumers and their communities throughout the state. Attendance at our Quarterly meetings average between 50-80 members and our Regional Symposium averages 150 members.

Key Statics:

- 78% of members have a CFP designation
- Average length of membership is 10 years
- 27%+ have been members for less than 2 years (we are growing!)
- Licensing Demographics
 - Series 7 35%
 - Series 66 12%
 - Series 65 26%
 - Life Insurance 35%
 - Variable 22%

Our members are financial planners, accountants, real estate planners, faculty, family wealth counselors, students, brokers, insurance professionals, brokers, and investment managers from all over Georgia.

Much of the success and growth FPA of Georgia has experienced is a direct result of the support and financial commitment from our partners. The financial support from our partners help us to provide speakers, special activities, socials, retain facilities, and community outreach efforts that will attract today and tomorrow's top financial planning professionals.

Your financial support for the FPA of Georgia will be rewarded throughout the year with a variety of opportunities to gain direct recognition for your business, the services you provide and opportunities for face-to-face discussions with decision makers. Depending upon the level of partnership you select, you will have numerous occasions to establish new contacts and nurture existing relationships.

If you would like to secure a partnership with FPA of GA, please complete the partnership agreement. We look forward to your support as we continue to expand the footprint of the financial planning community.

Visit our website at www.fpage.org for information on our mission and vision, as well as detailed information on committee strategies and planned activities. The Financial Planning Association (FPA®) is a national organization with nearly 30,000 financial planning members and 98 chapters located across the country. As members join the FPA®, they join at the national level and automatically become a member of our local chapter. Visit our calendar where you can learn about the many outreach programs and events our members participate in throughout the year and join us, especially during Financial Literacy Month and Financial Planning Week.

The Georgia chapter has consistently been selected and awarded "Gold Status" in the Road Map to Success program. Georgia has held this status for several years and continues to strive for this chapter recognition award! Each year chapters across the country participate in this National FPA® chapter recognition program.

Best,

Terri Munro, CFP®

FPA of GA President 2018

If you have additional questions about becoming a partner with FPA of Georgia, please feel free to contact:

- Liz Ferreira, FPA of GA Chapter Administrator, (770) 516-8322 admin@fpage.org
- Completed partnership agreements can be emailed to admin@fpage.org or faxed to (770) 516-0236.

Benefits at a Glance

2018 PARTNERSHIP BENEFITS	Platinum	Gold	Silver	Bronze
Regional Symposium Tickets	6	4	3	2
Booth Space	Double	Single	Single	Single
Symposium program and on-site signage	Premium	Logo	Listing	Listing
Symposium on-site signage	Premium	Logo	Listing	
Symposium attendee list (pre- and post-conference)	•	•	•	
Regional Symposium speaker introduction	•	•		
Regional Symposium Keynote speaker introduction with 5 minutes at podium and marketing material placed on tables	•			
Scrolling recognition with logo at every event with a projector present	•	•		
Recognition as partner in all 4 newsletters	•	•		
10 minute presentation at one Board Meeting	•			
2-minute intro videos posted on website <i>and</i> in member email blasts (company provided)	•			
Electronic spreadsheet of membership	Quarterly	One-time		
Attendee lists from Quarterly Meetings	4	2		
Annual pass to all Quarterly meetings	4	2	1	
Choice of Additional Events, Educational or Meetings to sponsor	3	2		
Company recognition on FPAGA Website	Logo/Link on homepage & Partner Page	Logo and Link-Partner Page	Name on Partner Page	
Before December 31st - Save More (10%)	\$4,500	\$2,250	\$1750	\$1,250
After December 31st	\$5,000	\$2,500	\$1750	\$1,250

PARTNERSHIP Opportunities

Platinum - \$5,000

Pay by December 31st to receive a discount of 10%

Regional Symposium:

- 6 tickets for attendees
- Double booth space/premium placement
- Premium Signage & Program Recognition (Logo displayed in Main Hall and General Session room)
- 5 minutes at the microphone with keynote speaker introduction
- Brochure/Flyer/Handout placed in General session room before speaker intro
- Symposium attendee list (pre- and post-conference)

Additional:

- Logo, Link and optional video (company provided) on FPAGA website
- Scrolling recognition with logo at every event with a projector present
- Four (4) Annual passes to all quarterly meetings
- Attendee list from quarterly meetings
- Recognition as partner in all 4 newsletters
- Electronic spreadsheet of membership (quarterly)
- Your choice of 3 additional sponsorship events from: Educational Events or Member Socials
- 10 minute presentation at 1 Board Meeting

Silver - \$1,750

Regional Symposium

- 3 tickets for attendees
- Single booth space
- Listing in the program and on signage
- Company name on FPAGA website
- Symposium attendee list (pre- and post-conference)
- Company name on Regional Symposium marketing and emails

Additional:

- One (1) annual quarterly meeting pass

Gold - \$2,500

Pay by December 31st to receive a discount of 10%

Regional Symposium:

- 4 tickets for attendees
- Single booth space
- Logo in the program and on signage
- Company logo on FPAGA website
- Company name on Regional Symposium marketing and emails
- Opportunity to introduce yourself and a breakout session speaker at Regional Symposium
- Symposium attendee list (pre- and post-conference)

Additional:

- Company recognized on FPA GA website with link
- Scrolling recognition with logo at every event with a projector present
- Attendee list from two quarterly meetings
- Two (2) Annual quarterly meeting passes
- Recognition as partner in all 4 newsletters
- Electronic spreadsheet of membership (one time)
- Your choice of 2 additional sponsorship events from: Educational Events or Member Socials

Bronze - \$1,250

Regional Symposium only

- 2 tickets for attendees
- Single booth space
- Listing in the program

Additional Opportunities

Chapter Supporter - \$1,000

Your Choice of 2 Events from: Quarterly Meeting, Educational or Member Events/Socials

Regional Symposium Opportunities

\$750 – Post Conference Reception-Two Sponsors Max: Includes special signage at Reception, 2 extra attendee tickets and page in program

\$500 each – Breakfast, Lunch-Two Sponsors Max for each meal: Includes special signage, opportunity to speak for two minutes at podium before meals and brochures at tables

\$300 Break Sponsor at Regional Symposium: Includes special signage, at break area and recognition in program opportunity to speak for two minutes at podium before meals and brochures at tables

FPA of Georgia 2018 Partnership Agreement



Company Information

Please print

Date

Company Name (as it should appear for recognition)

Contact Name

Title

Company Address

City

State/Zip

Telephone

Email

Website

Payment Information

- Check (Please make check payable to FPA of Georgia)
- MC / VISA / Discover
- American Express

Card Number

Expiration Date

Name as it appears on card

Cardholder's Signature

Partnership Level

- \$5,000 - Platinum Partnership
- \$2,500 - Gold Partnership
- \$1,750 - Silver Partnership
- \$1,250 - Bronze Partnership

Additional Opportunities

- \$1,000 - Two Special Events
Meetings and Events must be selected in advance. Please see selection sheet.
- \$750 - Regional Symposium Reception (limit 2 partners)
- \$300 - Regional Symposium Break
- \$500 - Regional Symposium Breakfast or Lunch (limit 2 partners)

\$ _____

Total Payment

Mail checks to **FPA of Georgia**
3227 S. Cherokee Lane, Ste. 1320
Woodstock, GA 30188
Scan and email: admin@fpaga.org
Fax form to: 770-516-0236



FPAGA Meetings and Event Types

Regional Symposium

Location: Cobb Galleria Center | 8 a.m. until 6:00 p.m.

Date: May 9, 2018

Quarterly Meetings

Location: Hyatt at Villa Christina | 7:30 a.m. until 9:45 a.m.

Dates Available: January 25, 2018 | April 26, 2018 | July 26, 2018 | October 25, 2018

- *Partners listed on all pre-meeting promotional correspondence* distributed to the FPAGA membership as well as scrolling presentation at all meetings
- *Special signage at the meeting*
- *Display table* provided at the meeting distribution of promotional materials and advertising
- *Partner receives 2 full minutes of microphone time* to promote company products and services (First come first served. Limit of 2 partners per meeting)

Career Development

Location: TBD | Time TBD

Dates Available: Feb 2018 TBD | May 2018 TBD | August 2018 TBD | November 2018 TBD

- *Partners listed on all pre-meeting promotional correspondence* distributed to the FPAGA membership
- *Special signage at the event*
- Three opportunities scheduled for members during the meeting to meet with Partners
- *Partner gets 5 full minutes of microphone time* to promote company products and services. (First come first served. Limit of 1 partner per meeting)

Member Socials and Events

Location: TBD | Time TBD

Dates Available: Feb 2018 | April 2018 | August 2018 | Nov 2018

Each year FPAGA supports a special outing / event with high profile recognition for our Partners to build upon networking opportunities

- *Partners listed on all pre-meeting promotional correspondence* distributed to the FPAGA membership
- *Special signage at the event*

All Event Dates are First Come, First Served

Quarterly Meeting Available Dates

Location: Hyatt Villa Christina Time: 7:30 am until 9:45 am

- January 25, 2018 April 26, 2018 July 26, 2018 October 25, 2018

Career Development Meeting Available Dates

Location: TBD

- February 2018 May 2018 August 2018 November 2018

Member Social Available Dates

Location: TBD Time: TBD

- February 2018 April 2018 August 2018 November 2018

Contact Person _____ Date _____

Company _____ Website _____

Address _____

Phone _____ Email _____

We have read the Rules and Regulations. We understand that this contract shall be legally binding between the Financial Planning Association of Georgia and the Exhibitor upon acceptance in writing by the Financial Planning Association of Georgia. We also understand that any change in the information in this contract must be made in writing.

Please type or print all information. Fax to (770) 516-0236 or email to admin@fpaga.org