



FINANCIAL
PLANNING
ASSOCIATION

MINNESOTA



2025 Partnership Packages

Your Partner in Planning™

OVERVIEW OF THE YEAR

JAN 21

Chapter Meeting

- » Educational Meeting with Headliner Speakers
- » In-person format
- » Varied locations
- » Plan to also Zoom

FEB 18

Partner Session

- » Educational Meeting with Partner-hosted Speakers
- » Hosted online
- » Could be hosted in-person as a Lunch n' Learn

MAR 18

Networking

- » Networking sessions for members and partners
- » Some hosted and inexpensive
- » Varied locations
- » Others with fun experiences

APR 22

Spring Training

- » Half-day Educational event
- » Complement ASCEND
- » Minimal cost to attendees
- » Partner-hosted sessions
- » Possible Keynote

MAY 20

Partner Session

- » Educational Meeting with Partner-hosted Speakers
- » Hosted online
- » Could be hosted in-person as a Lunch n' Learn

JUN 17

Networking

- » Networking sessions for members and partners
- » Some hosted and inexpensive
- » Varied locations
- » Others with fun experiences

JUL 15

Chapter Meeting

- » Educational Meeting with Headliner Speakers
- » In-person format
- » Varied locations
- » Plan to also Zoom

AUG *TBD*

Golf Event

- » Participation and promotion at Golf Event
- » Hole Representation
- » Pin Prizes
- » Experience Partnerships

SEP 16

Partner Session

- » Educational Meeting with Partner-hosted Speakers
- » Hosted online
- » Could be hosted in-person as a Lunch n' Learn

OCT 21

ASCEND

- » Participation and promotion at ASCEND
- » Exhibitor Opportunities
- » Partnership and Add-Ons Available

NOV 18

Chapter Meeting

- » Educational Meeting with Headliner Speakers
- » In-person format
- » Varied locations
- » Plan to also Zoom

The Financial Planning Association of Minnesota is a robust chapter with approximately 650 members. We have several events throughout the year supporting the FPA value proposition of P – L – A – N: Practice Support, Learning, Advocacy and Networking.

Our partners are key in helping to offer engaging content and opportunities to bring together our community. In 2025 we are introducing some changes to the frequency and type of events while keeping the successful framework of our chapter.

- » Two-thirds of members are CFP® Professionals
- » Half hold their MN insurance license

CONTACT INFORMATION

Ky Carlson

FPA-MN Sales Coordinator
partnerships@fpamn.org
651-288-3727



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CHAPTER PARTNERSHIP OPPORTUNITIES

All event hosts will receive a dedicated social media post and will receive an electronic list of attendees. For 2025, we will be asking attendees if they're willing to also share their email addresses.

Chapter Partner : \$2,000

- » Attendance at all chapter events, including chapter meetings, Spring Training Session, Golf, New member reception and all committee hosted events
 - ◇ Special area at Spring Training for attendee engagement
- » Dedicated Partner Highlight in FPA Electronic Newsletter
- » Discount for at-the-tee partnership for Golf event.
- » Discount for ASCEND Exhibitor
- » Membership Database Directory sent out twice per year
- » Name, Logo and Link on FPA MN Website

Chapter Meeting Host : \$3,000 (3 available)

- » Host an in-person chapter meeting which includes:
 - ◇ 10-minute partner presentation
- » Dedicated feature article in newsletter
- » Exhibiting table at the meeting for materials and conversations
- » Will receive attendee list

Partner Session Host: \$3,000 (3 available)

- » Educational Meeting with Partner-hosted Speakers
 - ◇ Session needs to be approved by FPA MN Programs committee and should be CFP® CE approved, payment required after approval.
- » Hosted online via Zoom (Lunch n' Learn option available at partners' cost)
 - ◇ 10-minute partner presentation

Presenting Partner at Spring Training: \$3,000 (3 available)

- » Educational Meeting in-person with Partner-hosted Speakers part of a half-day event
 - ◇ Session needs to be approved by FPA MN Programs committee and should be CFP® CE approved, payment required after approval
 - ◇ 5-minute partner presentation

Networking Event Host: \$3,000 (2 available)

- » Host of experience-based networking event (option to influence event location/elements)
 - ◇ Opportunity to address the attendees
 - ◇ Signage at the event

Committee Lead Event Partner: \$1,000 (Inquire if interested)

- » Committees include DE&I, NexGen, Career Development, etc.
- » First come first serve
- » Expected attendance between 30-60
- » High levels of engagement in these intentionally smaller settings

Partner Email Highlight: \$500 (Limited availability)

- » Partner purchases a "spotlight" email promoting them as a partner of FPA
- » Content restrictions
- » Chapter Partnership is required to utilize this promotion



ASCEND PARTNERSHIP OPPORTUNITIES

The Annual Conference of FPA of Minnesota

October 21 – 22, 2025 | Saint Paul RiverCentre

ASCEND Exhibitor: \$3,000 / \$1,450 for Chapter Partners

- » Includes attendance for 2 to the conference, networking opportunities
- » Booth in the partner area
- » Receive a pre and post attendee list

ASCEND Premier Partner: \$6,500 (2 available)

- » Includes ASCEND Exhibitor benefit
- » Main stage introduction
- » Introduction of Keynote Address
- » Company representative may give up to 5 minutes introduction to your company
- » Promotional banner displayed prominently at the session (company provided)
- » Place promotional literature (one 8.5x11 or smaller) on each table (company provided)
- » Recognition on the splash screen and mobile app webpage
- » One banner ad in the conference mobile app, including links to your company website

Minute to Shine – Main Stage: \$1,000 (7 available)

- » Company representative may give a 1-minute introduction to your company on the main stage ahead of a keynote speaker
- » Draw for a prize provided by your company
- » Introductions will be staggered at the beginning and end of sessions

Minute to Shine – Breakout Session: \$500 (12 available)

- » Company representative may give a 1-minute introduction to your company in a breakout session of your choice.
- » Introductions will be staggered at the beginning and end of sessions

Breakfast Partner: \$1,000 (Exclusive)

- » Company logo on signage throughout breakfast
- » QR codes on signage directed to the Partner's website

Lunch Partner: \$1,000 (Exclusive)

- » Company logo on signage throughout lunch
- » QR codes on signage directed to the Partner's website

Break Partner: \$1,000 (Exclusive)

- » Company logo on signage throughout breaks
- » Recognition as a conference partner on the FPA-MN website, mobile app, conference signage, and in the on-site program
- » QR codes on signage directed to the Partner's website

Coffee Partner: \$1,000 (Exclusive)

- » Company logo on signage at all coffee stations
- » Opportunity to provide logoed napkins and/or cups
- » QR codes on signage directed to the Partner's website

Wifi Partner: \$500 (Exclusive)

- » Customized WiFi information

All ASCEND Partners will receive recognition as a conference partner on the FPA-MN website, mobile app, conference signage, and in the on-site program. Conference partners will also receive an event attendees list.

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GOLF EVENT OPPORTUNITIES

Golf Reception Partner: \$1,000 *(Exclusive)*

- » Opportunity to partner a happy hour/reception/dinner/etc., after golf concludes.

Tee Partner: \$750 / \$250 for Chapter Partner *(18 available)*

- » Set up your presence on a tee box to meet & greet golfers as they make their way through the course. You determine how you want to entertain golfers – treats, refreshments, games, etc. Please note that all food and beverage needs to be pre-ordered through golf club. Includes one representative lunch.

Putting Green Partner: \$500 *(Exclusive)*

- » Signage on the putting green.

Beverage Partner: \$500 *(2 available)*

- » Beverage Partner has the choice between providing 1) one drink ticket via the beverage cart or 2) a beverage station (ex: Bloody Mary Bar or Mimosa Bar) for golfers on the course. Partner will receive recognition on the Beverage cart or at the beverage station as well as on the webpage.

Lunch Partner: \$300 *(Exclusive)*

- » Signage at the lunch tables and on lunch tickets

Driving Range Partner: \$250 *(Exclusive)*

- » Signage on the driving range.

Pin Prize Partnerships: \$250 *(6 available)*

- » 2 Straightest Drive (men and women)
- » 2 Longest Drive (men and women)
- » 2 Closest to the Pins (men and women)
- » Partner provides prize for each pin prize selected



Organization Information

Organization _____

Name of Contact Person _____ Title _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

Email _____ Website _____

All listings and signage should read _____

Partnership Opportunities

CHAPTER PARTNERSHIPS

- Chapter Partner: \$2,000
- Chapter Meeting Host: \$3,000
- Partner Session Host: \$3,000
- Presenting Partner at Spring Training Day: \$3,000
- Networking Event Host: \$3,000
- Committee Lead Event Partner: \$1,000
- Partner Email Highlight Partner: \$500

ASCEND PARTNERSHIPS

- Exhibitor: \$3,000 / \$1,450 for Chapter Partners
- ASCEND Premier Partner: \$6,500
- Minute to Shine – Main Stage: \$1,000
- Minute to Shine – Breakout Session: \$500
- Breakfast Partner: \$1000
- Lunch Partner: \$1000
- Break Partner: \$1000
- Coffee Partner: \$1000
- Wifi Partner: \$500

GOLF TOURNAMENT

- Golf Reception Partner: \$1,000
- Tee Partner: \$750 / \$250 Chapter Partner
- Putting Green Partner: \$500
- Beverage Partner: \$500
- Lunch Partner: \$300
- Driving Range Partner: \$250
- Pin Prize Partnerships: \$250

Straightest Drive	Men	Women	Longest Drive	Men	Women	Closest to the Pins	Men	Women
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Payment Information

All exhibits and partnerships are available on a first-come, first-served basis. Exhibits and partnerships are required to be paid prior to the start of an event. If paying by credit card, all fields are required.

GRAND TOTAL: \$ _____ Check (payable to FPA of MN) Visa Mastercard American Express Discover

Name (as it appears on card) _____

Card Number _____ Exp. Date _____ Sec. Code _____

Email _____ Phone _____

Authorized Signature _____

Address (if different than above) _____

City _____ State _____ Zip _____

Mail/Fax with payment to:

1601 Utica Ave S, Suite 213, Minneapolis, MN 55416-3400
 Fax: 651-290-2266

Questions? Contact Ky Carlson at partnerships@fpamn.org or 651-288-3727.