

# 2021 FPA Dallas/Fort Worth Corporate Partnership Opportunities



**Change Tomorrows™**

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[www.fpadfw.org](http://www.fpadfw.org)  
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(972) 747-0407

# OUR VISION FOR OUR PARTNERS

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

## QUICKFACTS

FPA Dallas/Fort Worth has an average of 800+ 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..

- ✓ 80% of members are over age 40
- ✓ 72% of members have ten plus years of professional experience
- ✓ 71% of members are CFP®'s  
12% are ChFC's  
11% are CLUs or CPA's
- ✓ 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 Management  
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 Dallas/Fort Worth area and one of the top FPA chapters in the country.

## Where Financial Planning Practitioners Come Together.

Our members are dedicated to elevating each other, and the financial planning profession. The more we grow as practitioners and planners, the better we serve our clients today and meet the needs of our clients tomorrow.

It's more important than ever in today's COVID impacted business environment to stay connected. **FPA Dallas/Fort Worth (DFW) is your gateway and connection to a chapter comprised over 800 leaders in the DFW financial planning community.** FPA DFW is one of the Financial Planning Association's largest and most active chapters. In fact, FPA DFW's reach extends well beyond our 800 member base, to include an additional 800 prospective/upcoming FPA members contacted and promoted to regularly on our sponsors' behalf. Throughout the challenges faced due to COVID-19 during 2020 our partners supported the DFW chapter and stepped up by providing timely topics and online opportunities to our members and we could not be more grateful. As our way of saying **THANK YOU** for your unwavering support we are offering exclusive discounts to our existing partners who elect to renew by September 30, 2020. We thank you for standing by us during challenging times and we value your support in immeasurable ways.

## PARTNER BENEFITS

### PERSONAL CONNECTIONS

FPA DFW is developing some exciting new avenues to keep our partners connected with our members, both in-person and personalized virtual meetings. Our regular in-person chapter meetings will resume, along with our special events, as soon as conditions safely allow.

### RECOGNITION

Visibility as an FPA Dallas/Fort Worth partner throughout the year at all chapter events, all newsletters, and on our website.

### EXPOSURE

You are encouraged to attend all FPA Dallas/Fort Worth events where we will proudly introduce you to our membership. The financial professionals you'll meet through the FPA can help you build long-term business relationships. Members are continually looking for information on new products and services to meet their clients' needs.

### OPPORTUNITIES

You can meet and share your message with attendees at all chapter events. It's an excellent time to collect business cards for follow-up marketing and potential future business.

### EXHIBIT SPACE

Exhibit space at the annual FPA Dallas/Fort Worth Conference with anticipated attendance of 300+ participants.

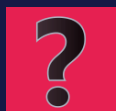
23,174

Total Members

16,835

Total CFP® Members (73%)

BENEFITS AT A GLANCE	Value	Double Platinum (Max 1) 8,500	Platinum (Max 8) 6,500	Gold 5,000	Silver 3,500
* <b>New 2021 Benefit</b> Corporate Partner Hosted Event on Zoom & promoted by FPA	1,600.	•	•	•	
* <b>New 2021 Benefit</b> Dedicated landing page on DFW website to provide content of choice	900.	•	•	•	•
* <b>New 2021 Benefit</b> Company logo (with hyperlink) on scrolling banner on DFW home page	550.	•	•	•	
<b>FPA DFW Sponsor Appreciation Event</b> Networking opportunity with the FPA DFW Board & Leadership Alumni	☆	•	•	•	•
<b>Sponsor Spotlight @ FPA DFW Conference</b>	1500.	•			
<b>Sponsor Spotlight @ an FPA DFW chapter meeting</b>	750.		•		
<b>Sponsor Spotlight @ an FPA DFW Board of Directors meeting</b>	450.			•	
<b>FPA DFW Annual Conference Benefits - April 2021</b>					
<b>Premium</b> exhibit space @ the FPA Dallas/Fort Worth Symposium + attendee list	2000.	2 Attendees	2 Attendees		
<b>Standard</b> exhibit space at the FPA Dallas/Fort Worth Symposium + attendee list	1000.			1 Attendee	1 Attendee
<b>Keynote Speaker:</b> Presenting Keynote at the 2021 DFW Conference	2000.	•			
<b>Presenting Speaker:</b> Educational speaking opportunity at a chapter meeting (topic/speaker to be approved by FPA DFW)	1000.		•		
<b>Nomination:</b> 7 <sup>th</sup> Annual Corporate Partner of the Year Award	1600.	•	•	•	
<b>Promotion:</b> Add your conferences and webinars to the DFW website and/or newsletter (deadlines apply to newsletter)	500.	•	•	•	
<b>Newsletter Advertising</b>	350. per ad	3 ads	2 ads	1 ad	
<b>Blast E-Mail to FPA Dallas/Fort Worth Membership</b>	500. per email	4x	3x	2x	
<b>Quarterly membership list &amp; demographic report</b>	2000.	•	•	•	•
<b>Annual pass to 7 FPA DFW chapter meetings</b>	55. ea	2 per event	2 per event	1 per event	1 per event
<b>Logo &amp; contact information on FPA DFW website</b>	500.	•	•	•	•
<b>Regular recognition as Corporate Partner</b>	☆	•	•	•	•



\* New 2021 benefits outlined on page 5

For questions regarding benefits contact us at: [execdir@fpadfw.org](mailto:execdir@fpadfw.org) | (972) 747-0407

# New 2021 Benefits!

## Reach FPA Dallas/Fort Worth Members Through Timely Topics & Education

### \* Corporate Partner Hosted Events on Zoom

**Primary Goal:** To provide our partners with exclusive opportunities and access to our local members and allied professionals.

Platinum and Gold partners will receive a new benefit beginning in 2021.

FPA DFW is planning to expand our partner access to our members through sponsor hosted virtual events promoted by FPA DFW to our membership on your behalf. FPA DFW partner hosted virtual meeting method of contact has proven extremely valuable to those sponsors who have taken advantage of the newly rolled out method of access over the past couple months. Well attended partner hosted events promoted by FPA DFW provide unparalleled access for personalized messages to our sponsors' target audience.



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### \* Dedicated landing page on FPA DFW website to provide content of choice

**Primary Goal:** To provide a virtual platform for partners to promote, advertise, educate and connect with FPA members.

This new benefit applies to all partnership levels (Platinum/Gold/Silver).

Each partner will receive a dedicated page on the FPA DFW website to promote any material, events, videos, links and advertisements. The content is at the partners discretion. No deadlines apply. The partner will be responsible for sending content to FPA, including any updates upon request. We will inform our members of this new benefit in order to drive interest and traffic to the website pages.

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### \* Company logo (w/hyperlink) on scrolling banner on FPA DFW home page

**Primary Goal:** To provide a virtual presence on the home page of our website for all visitors to see.

This new benefit applies to Platinum & Gold partners.

Platinum and Gold partners will have their logo featured in a continuously scrolling banner on the home page of the FPA DFW website. Each logo will be linked to the respective partners website.

**DISCLAIMER:** Our primary goal for 2021 is to return to in-person events. This decision will be based on the outcome and effect that COVID-19 may have on larger events and venues. Our utmost concern is the safety of our members, partners and guests and all final decisions will be based on this. In the event in-person events are unable to take place we will proceed with having chapter meetings virtually via Zoom webinars. We thank you for your understanding.



# FPA Dallas/Fort Worth Annual Conference

The FPA Dallas/Fort Worth Conference will be held April 29, 2021. This annual event is for partners that seek to connect with experienced planners who typically handle high-net worth clients. The FPA Dallas/Fort Worth Conference benefits are included for every sponsorship level.

Benefit	Double Platinum	Platinum	Gold	Silver
Draped 6 ft. tabletop booth in exhibit hall	•	•	•	•
Conference attendee list	•	•	•	•
* Speaking opportunity	•	•		
Logo recognition on event website, signage, marketing materials, advertisements and programs	•	•	•	•
Registrations (additional attendee passes may be purchased)	3	2	1	1
Logo recognition on FPA Dallas/Fort Worth website	•	•	•	•
Sponsor recognition throughout the conference	•	•	•	•
Conference CE credits, swag, program and literature	•	•	•	•

For more information on the FPA Dallas/Fort Worth Conference, please contact our office at:

[execdir@fpadfw.org](mailto:execdir@fpadfw.org)

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## \* Speaking Opportunities

▶ **Double Platinum:** Guaranteed keynote speaker at the conference. Topics must be reviewed and approved by FPA.

▶ **Platinum:** Guaranteed speaking spot at a conference breakout session or a chapter meeting. Breakout sessions at the conference are limited and based on availability. Speakers and topics must be reviewed and approved and are selected at the discretion of the FPA DFW Special Events and/or Education Committee.



# 2021 Sponsorship Levels

*We want your partnership with FPA Dallas/Fort Worth to be mutually beneficial and your participation in our chapter is the key success! Get involved by volunteering and attending all the FPA of Dallas/Fort Worth events and meetings. We also encourage you to actively participate on committees! The more you put in, the more you'll reap the benefits!*



## **DOUBLE PLATINUM LEVEL: \$ 8,500**

Priority will be given to the Double Platinum Partner of the previous year. The prior year Double Platinum Partners will have until November 15 to return the signed letter of agreement. After November 15 the Double Platinum sponsorship will be granted to a new sponsor that submits the online agreement form. If there is a conflict, the FPA DFW board of directors will decide by majority vote.



## **PLATINUM LEVEL: \$ 6,500**

Priority will be given to all Platinum Partners of the previous year and/or to those who have actively served on a committee or on the board in the previous year. Partners will have until November 15 to submit the online agreement form. After November 15 remaining partnership spots will be given to new sponsors that have submitted the agreement form. If there is a conflict, the FPA DFW board of directors will decide by majority vote.

In addition to all Gold & Silver benefits, Double Platinum & Platinum Partners also receive:

- Double Platinum partner receives a guaranteed keynote speaking spot at the annual FPA DFW Conference
- Platinum partners receive a CE presentation at a regular chapter meeting OR a breakout session at the annual FPA DFW Conference. Topics and speakers are subject to approval by the program committee.
- Promotion of one Zoom event hosted by your organization.
- Exhibit booth + two representative's + priority placement in the annual FPA DFW Conference Exhibit Hall. Exhibit booth's are assigned in the order that contracts are received. Additional conference representatives can be added at a discounted rate.
- 10-minute featured sponsor spotlight at a chapter event.



## **GOLD LEVEL: \$ 5,000**

In addition to all Silver benefits, Gold Partners also receive:

- Dedicated page on FPA DFW website
- Logo featured on scrolling banner on FPA DFW home page
- Partner hosted ZOOM event
- Meet the Board! 10 minute sponsor spotlight at a FPA DFW board of directors meeting + optional happy hour
- Exhibit booth + one representative at the annual FPA Dallas/Fort Worth Symposium. Booth's are assigned in the order that contracts are received. Additional conference representatives may be added at a discounted rate.
- Company logo and sponsor recognition at all chapter events.
- Reserved table at the Dallas location chapter luncheon meeting during the calendar year.



## **SILVER LEVEL: \$ 3,500**

Speaking/presentation time is not included with this level.

- Exhibit booth + one representative at the annual FPA DFW Conference. Exhibit booth's are assigned in the order that contracts are received. Additional conference representatives may be added at a discounted rate.
- Company logo in all FPA DFW newsletters.
- Company logo and website link on the FPA DFW website.

# 2021 Events

FPA Dallas/Fort Worth events provide exclusive access to financial advisors in the greater Dallas/Fort Worth area. Our events are ideal settings for you to get to know our members, other partners, and allied professional guests. We also host many small group events, drawing on our members combined experience, which are outstanding opportunities to meet and engage our members in more personal setting.

- FPA DFW Annual Conference
- FPA DFW chapter meetings (Dallas & Fort Worth)
- NexGen events
- FPA DFW Career Day
- Socials, networking events & happy hours
- DFW Honors Awards Banquet
- Career Development events
- DFW Sponsor Appreciation event at Nick & Sams
- Pro Bono events
- FPA DFW Media Training



## Contact Us



Brad Purifoy  
2020 Partnerships Director



Melisa Hall  
FPA DFW Executive Director



Jason Bottenfield, CFP®  
2021 Partnerships Director

If you would like to discuss partnership opportunities in greater detail, please contact Brad Purifoy, FPA DFW Partnerships Director; 214-746-5094 / [partnerships@fpadfw.org](mailto:partnerships@fpadfw.org). If you would like to discuss any other questions regarding partnership benefits or general questions about our chapter, please contact Melisa Hall, FPA DFW Executive Director; 972-747-0407 / [execdir@fpadfw.org](mailto:execdir@fpadfw.org).

All Corporate Partnerships are based on the 2021 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 chapter meetings, the annual FPA DFW Conference or other speaking events.

***We are very appreciative of all you do for us!***



**FPA of Dallas/Fort Worth**

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# 2021 Corporate Partner Agreement

To apply or renew your partnership online for 2021

**CLICK HERE**

You will be redirected to Microsoft Forms

2021 Partnership Level	Price
Double Platinum	8,500
Platinum	6,500
Gold	5,000
Silver	3,500

2021 FPA Dallas/Fort Worth Corporate Partnership Agreement

Complete and submit online. If we do not have a current logo on file for you please send it in a high resolution format (JPG or GIF high resolution) to the FPA DFW office at: [execdir@fpadfw.org](mailto:execdir@fpadfw.org).

\* Required

1. Date \*

2. Company Name \*