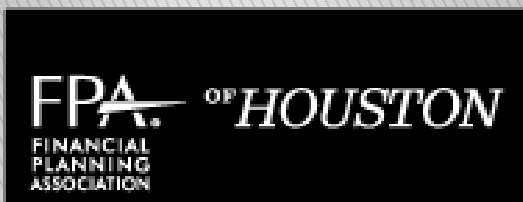




# 2020 CORPORATE PARTNERSHIP OPPORTUNITIES



# 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 of Houston has an average of 480 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 is just over 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 Management
  - 69% Estate Planning
- ✓ Long term involvement equals lasting relationships

### **"FPA HOUSTON 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 Houston 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 90 active local chapters. The FPA of Houston chapter is widely recognized as a top leadership organization 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 18 consecutive years (2000-2019), 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 of Houston's members are a valuable audience. Members collectively manage substantial investment assets on behalf of clients. Many FPA of Houston members are nationally known and active within leading professional groups and societies. FPA of Houston 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 an FPA of Houston partner throughout the year at all FPA of Houston events, in all newsletters, as well as on our website.

### EXPOSURE

You are encouraged to attend all FPA Houston meetings and events where we will introduce you to our membership on a consistent basis. 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 the chapter meetings. It's an excellent time to collect business cards for follow-up marketing and potential future business.

### EXHIBITOR SPACE

Exhibitor space at the annual FPA Houston Financial Planning Symposium. Anticipated attendance of 150 participants.

23,174

Total Members

16,835

Total CFP® Members (73%)

BENEFITS AT A GLANCE	Double Platinum (Max 1) \$6,000	Platinum (Max 8) \$4,800	Gold \$3,500	Silver \$2,500
<b>New Benefit!</b> Corporate Partner Hosted Happy Hour <i>(See page 4 for details)</i>	•	•	•	•
FPA Houston Sponsor Appreciation Event Fall 2020 – Networking event with the FPA Houston Board & Leadership Alumni	•	•	•	•
10 min. Sponsor Spotlight at the FPA Houston Symposium	•			
10 min. Sponsor Spotlight at an FPA Houston chapter meeting		•		
Premium exhibit space at the FPA Houston Symposium + attendee list	* 2 Attendees	* 2 Attendees		
Standard exhibit space at the FPA Houston Symposium + attendee list			* 1 Attendee	* 1 Attendee
Keynote Speaker – Presenting Sponsor & Keynote at the 2020 Symposium	•			
Presenting Speaker – 50 minute educational speaking opportunity at a chapter meeting luncheon (topics/speakers to be approved by FPA Houston)		•		
Nomination for Partner of the 2020 4 <sup>th</sup> Annual Corporate Partner of the Year Award	•	•	•	
Free Promotion on the FPA Houston website for any conference, webinar or event that your company is hosting	•	•	•	
Electronic Newsletter Advertisements <ul style="list-style-type: none"> <li>• Double Platinum x 3</li> <li>• Platinum x 2</li> <li>• Gold x 1</li> </ul>	3X	2X	1X	
Blast E-Mail to the FPA Houston Membership <ul style="list-style-type: none"> <li>• Double Platinum &amp; Platinum x 3</li> <li>• Gold x 2</li> </ul>	•	•	•	
Quarterly Houston membership list & demographic report	•	•	•	•
Annual pass to 6 chapter meetings	2 per meeting	2 per meeting	1 per meeting	1 per meeting
Logo placement & contact information on FPA Houston website	•	•	•	•
Regular recognition as Corporate Partner	•	•	•	•



For questions regarding benefits contact us at: [execdir@fpahouston.org](mailto:execdir@fpahouston.org) | (713) 518-1785

*New Benefit!*

# FPA Houston Corporate Partner Sponsored Happy Hour



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

**FPA HOUSTON:** Will promote and send out email invitations

Upon request, will provide venue recommendations (sponsor is welcome to use a different venue)

**PARTNER:** Will take care of booking the venue and select date

Will provide all details to FPA in order to be able to properly send out an email or Evite

Will assume all expenses and costs for the event

**STEP 1:** Corporate Partner reaches out to FPA with request and the date they would like to host the event. The Partner is responsible for booking the venue. A list of recommended venues will be provided upon request. The venue is completely at the Partner's discretion.

**STEP 2:** FPA will provide the Partner with a current list of FPA member's names and firms. The Partner can decide if they want to send the invitation out to all members, or they can select certain members that they would like to target. Once decided, relay this information to FPA.

**STEP 3:** The Partner will provide all details to FPA so that an invitation can be created. This includes: venue, date, event/venue capacity, and wording for invitation. FPA will need this information a minimum of 3-4 weeks in advance.

**STEP 4:** FPA will send out the invitations. All RSVP's should go directly to the Partner.

**STEP 5:** The Partner will be responsible for hosting and paying for the actual event. FPA is not able to provide staffing.

Primary Contact:

Melisa Hall @ [execdir@fpahouston.org](mailto:execdir@fpahouston.org) Or call (713) 518-1785

# FPA Houston SYMPOSIUM



FPA Houston Financial Planning Symposium (September 23, 2020) is the event for firms that want to connect with experienced planners who typically handle high-net worth clients.

The FPA Houston Symposium benefits are included for every sponsorship level. Benefits vary by sponsorship level.

Benefit	Double Platinum	Platinum	Gold	Silver
One draped 6 ft. tabletop exhibition space	•	•	•	•
One time use of attendee list	•	•	•	•
* Speaking opportunity	•	•		
Logo recognition on event website, signage, event marketing materials, advertising and program	•	•	•	•
Registrations	2	2	1	1
Logo recognition on the FPA Houston website	•	•	•	•
Sponsor recognition during the Symposium	•	•	•	•
Conference CE credits (if applicable), bag, program and literature	•	•	•	•

### \* Speaking Opportunities

- **Double Platinum:** Guaranteed keynote speaker at the Symposium. Topics must be reviewed and approved by FPA.
- **Platinum:** Guaranteed speaking spot at a Symposium breakout session **OR** chapter luncheon meeting. Breakout sessions at the Symposium are limited and based on availability. Speakers and topics must be reviewed and approved and are selected at the discretion of the FPA Houston Education Director.

For more information on the FPA Houston Symposium, please contact:

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

Or call (713) 518-1785

## BENEFITS OF PARTNERING WITH FPA Houston

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 the FPA Houston website: [www.fpahouston.org](http://www.fpahouston.org)  
For information on our mission and vision, as well as detailed information on planned activities.



## Letter of Agreement for FPA of Houston Partners

The undersigned party (herein after "Partner") hereby applies to become a Corporate Partner of the FPA of Houston 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 of Houston chapter 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 the Partner will include:

- Prompt payment of annual partnership fee
- 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 and contact information to be used on the FPA Houston website and newsletter
- Provide booth materials and set up at the annual FPA Houston Symposium

### FPA of Houston 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

# 2020 SPONSORSHIP LEVELS

We want your partnership with FPA of Houston to be successful, and your **PARTICIPATION** in our chapter is the key! Get involved by volunteering, attending all of the FPA of Houston events and meetings. We also encourage you to actively participate on committees! The more you put in, the more you'll get out.

## 5 LEVELS OF PARTNERSHIPS TO SELECT FROM



**I. Double Platinum Partners (\$6,000) –Double Platinum and Platinum levels are the highest level of FPA Houston Partnership. Eligibility requirements for Double Platinum Partners:**

Priority will be given to the Double Platinum/Premier Partners of the previous year.

The prior year Double Platinum Partners will have until November 15<sup>th</sup> to return the signed letter of agreement. After November 15<sup>th</sup> this level of sponsorship will be given to the first new sponsor that submits a completed signed letter of agreement. If there is a conflict, the FPA Houston board of directors will decide via a majority vote.

**II. Platinum Partners (\$4,800) –Eligibility requirements for Platinum Partners:**

Priority will be given to all Platinum/Premier Partners of the previous year.

Priority will be given to those who have actively served on a committee or on the board in the previous year. Partners will have until November 15<sup>th</sup> to return the signed letter of agreement. After November 15<sup>th</sup> remaining partnership spots will be given to new sponsors that have submitted a signed letter of agreement. If there is a conflict, the FPA Houston board of directors will decide via a majority vote.

**Double Platinum & Platinum Partners receive all Silver and Gold benefits +:**

- Double Platinum partners receives a guaranteed keynote speaking spot at the FPA Houston Symposium
- Platinum partners receive one 50-minute CE presentation at a regular chapter luncheon meeting **OR** a breakout session at the FPA Houston Symposium, subject to approval by the program committee.
- An assigned exhibit booth with two attendees which includes priority placement at the FPA Houston Symposium. Exhibit booth selection priority given based on when your contract is received. Additional conference rep attendees can be purchased at the Corporate Partner discounted price.
- Reserved table at any chapter luncheon meeting during the calendar year.

**III. Gold Partners (\$3,500)**

**Gold Partners receive all Silver benefits +:**

- Exhibit table with one attendee at the FPA Houston Conference. Exhibit booth selection priority given based on when your contract is received. Additional conference rep attendees can be purchased at the Corporate Partner discounted price (see pg 8).
- Company logo and sponsor recognition at all chapter events.
- Reserved table at any chapter luncheon meeting during the calendar year.

**IV. Silver Partners (\$2,500) – This level of sponsorship may include both industry related and service related sponsors. No speaking or presentation time is included with this level.**

**Silver Partner Benefits: Please see 'Benefits at a Glance' for a full list of benefits**

- Exhibit table with one at the FPA Houston Symposium. Exhibit booth selection priority given based on when your contract is received. Additional conference rep attendees can be purchased at the Corporate Partner discounted price.
- Company logo in all FPA Houston newsletters.
- Company logo and website link on the FPA Houston website.



# Conferences & Events

All FPA of Houston events allow you access to our local members. Our larger events are perfect settings for you to get to know our members, other corporate partners, and our 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 a smaller and more personal setting.

- › FPA Houston Financial Planning Symposium
- › FPA Houston Chapter Meetings
- › Houston NexGen Events
- › FPA Houston Career Day
- › Houston Networking Events & Happy Hours
- › FPA Houston Women's Group
- › Advisor Exchange Series
- › NexGen Lunch Series
- › Houston Sponsor Appreciation Event
- › Houston Pro Bono Community Events

## Contact Us

Let us hear from you! If you would like to discuss partnership opportunities in greater detail, please contact Melisa Hall, FPA Houston Executive Director & Corporate Partnerships Liason (713) 518-1785 or [execdir@fpahouston.org](mailto:execdir@fpahouston.org). ***We are very appreciative of all you do for us.***

*All Corporate Partnerships are based on the 2020 calendar year. FPA of Houston 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 FPA Houston Symposium or any other speaking event.*



FPA of Houston

P.O. Box 1303

Frisco, Texas 75034

Office: (713) 518-1785

Email: [execdir@fpahouston.org](mailto:execdir@fpahouston.org)

Web: [www.fpahouston.org](http://www.fpahouston.org)





Sign me up for 2020 Partnership! Partner agrees to the above terms, and hereby applies for a partnership with FPA Houston:

Date: \_\_\_\_\_

Signed by:

\_\_\_\_\_  
Signature

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

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

\_\_\_\_\_  
Website URL

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

## BENEFIT SELECTION FORM

**PLATINUM LEVEL:** INDICATE YOUR TOP 2 DATE CHOICES FOR (10 MINUTE) SPONSOR SPOTLIGHT

(NOTE: DOUBLE PLATINUM AUTOMATICALLY RECEIVES A 10 MINUTE SPOTLIGHT AT THE FPA HOUSTON SYMPOSIUM)

**JANUARY 23 – MARCH 24 – APRIL 23 – JUNE 9 -- AUGUST 11 – OCTOBER 27**

1. \_\_\_\_\_ 2. \_\_\_\_\_

**PLATINUM LEVEL:** TOP 2 (50 MINUTE) EDUCATIONAL SPEAKER DATE CHOICES

(DOUBLE PLATINUM AUTOMATICALLY RECEIVES A 50 MINUTE KEYNOTE SPEAKING SPOT AT THE HOUSTON CONFERENCE)

**JANUARY 23 – MARCH 24 – APRIL 23 – JUNE 9 -- AUGUST 11 – OCTOBER 27 OR SYMPOSIUM BREAKOUT SESSION (SEPTEMBER 23)**

1. \_\_\_\_\_ 2. \_\_\_\_\_

### TOP 3 SPEAKERS & TOPICS THAT YOU WOULD RECOMMEND TO FPA HOUSTON FOR A GREAT PROGRAM

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

### TO-DO LIST FOR ALL PARTNERS

Social Media Handle for FPA PR @ \_\_\_\_\_ # \_\_\_\_\_

Email high resolution logo (if not already on file) to ([execdir@fpaHouston.org](mailto:execdir@fpaHouston.org))



Select One	2020 Partnership Level	Price
<input type="checkbox"/>	Double Platinum Partnership	\$6,000
<input type="checkbox"/>	Platinum Partnership	\$4,800
<input type="checkbox"/>	Gold Partnership	\$3,500
<input type="checkbox"/>	Silver Partnership	\$2,500

**Special Note:** FPA Houston may have some special opportunities throughout the year for sponsorships that would provide you with additional exposure. As those become available, we will reach out to you by email – with absolutely no obligation on your part. We are very appreciative of all that you do for us.

**Optional Conference Add On's**

<input type="checkbox"/>	Additional attendee/rep at FPA Houston Symposium • Platinum partnerships include 2 passes • Gold & Silver partnerships include 1 pass	\$200
<input type="checkbox"/>	Sponsorship of Symposium Tote Bags (with your company logo)	\$900

**Other Optional Add On's**

<input type="checkbox"/>	Houston NexGen Event Sponsorship	\$500
	<b>TOTAL</b>	\$ _____

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

**PAYMENT OPTIONS:** [select one] | **PLAN TO PAY IN**     2019     2020

**INVOICE ME** [select one] | **PLAN TO PAY BY:**     CHECK    Payable to: FPA Houston     CREDIT CARD

**SEND MY INVOICE BY EMAIL TO:** \_\_\_\_\_