FPA®
FINANCIAL PLANNING ASSOCIATION

2019 PARTNERSHIP GUIDE

FPA's primary aim is to elevate the profession that transforms lives through the power of financial planning.

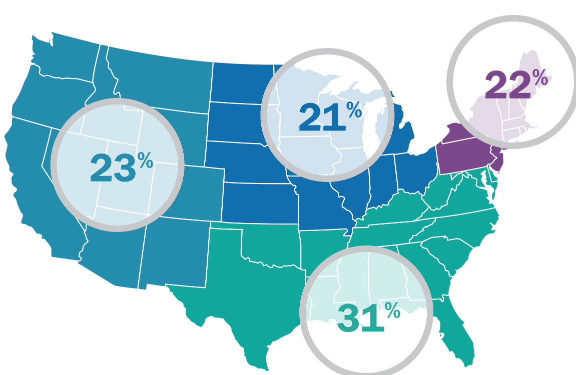
OVERVIEW OF FPA

The Financial Planning Association is nearly 23,000 members strong and has been the premier organization for financial planners since 2000, when the International Association for Financial Planners and the Institute for Certified Financial Planners merged to form one entity. This bold move created a home for all financial planning professionals to grow, learn and push the boundaries of financial planning. Today there is an FPA community in every major metro area across the U.S.

FPA's core member benefits are summarized within both an Advocacy and Education lens. FPA is responsible for suing the SEC over the Merrill Rule in 2007, monitoring proposed statewide laws impacting the use of certifications, and hosts a Federal Advocacy Day and Fiduciary Symposium, as well as inspiring and supporting local communities at the state level.

FPA provides access to expert-presented content and peer-to-peer education opportunities through FPA's conferences, online communities, deep educational programs, and research. Education spans the horizon of a financial planner's needs: soft skills, technical skills (how to do financial planning, and how to run a financial planning firm) and environmental and social issues impacting the profession.

GEOGRAPHIC REGION



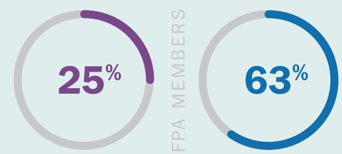
FPA CHAPTERS

LOCAL CHAPTERS 86

STUDENT COMMUNITIES 63

STATE COUNCILS 02

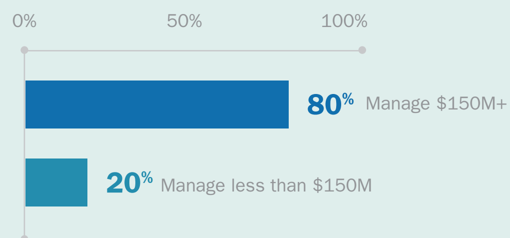
GENDER[1]



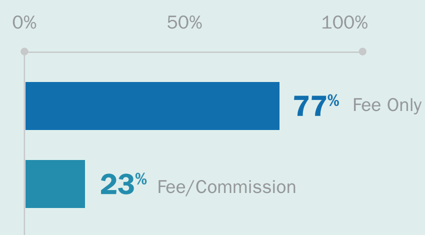
TOTAL MEMBERS: 22,478

TOTAL CERTIFIED FINANCIAL PLANNERS™ 16,103

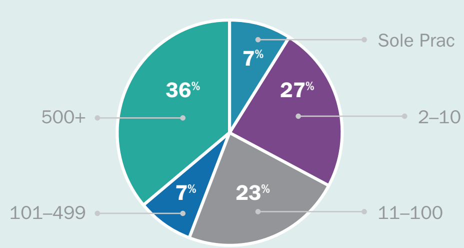
COMPANY ASSETS UNDER MANAGEMENT[2]



COMPENSATION MODEL[3]



FIRM SIZE[4]



Member counts as of December 31, 2018

- [1] 12% of FPA members did not disclose gender.
- [2] 10,974 CFP members reporting company AUM.
- [3] 14,746 CFP & Allied Professional members reporting compensation model.
- [4] 11,176 CFP members reporting firm size.

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

WHY PARTNER WITH FPA

FPA's Primary Aim is to elevate the profession that transforms lives through the power of financial planning. One of our core values as an association is to connect for collaborative impact, and that's why our partners are true partners:

"We are excited to be working with the Financial Planning Association (FPA) and its members. The quality of the programs and members are outstanding. I often hate it when others describe partnerships as a, "Win. Win" but in this case it truly is for all involved. We push each other to elevate the quality of the research, thought leadership and initiatives we are working on together for the benefit of the members. It truly shows in the value and quality of the deliverable."
– SEI, 2019 FPA Strategic Partner

2018 INTEGRATION POINTS

30%

of FPA conference content came from FPA partners

60%

of FPA webinar attendees viewed partnered content

18%

of FPA members have personal insurance through FPA partners

55%

of FPA's **Journal in the Round** presentations were delivered with partner support

FPA CURRENT AREAS OF FOCUS:

While FPA is focused on an ambitious internal project called the OneFPA Network, which will tighten the financial planning community and allow FPA members to elevate the financial planning profession in ways that are truly impactful, there are three core areas where FPA has prioritized attention for the benefit of our members and the profession:

1. DEVELOPING THE TALENT PIPELINE

Engaging students, NexGen planners and diverse planners in conversations, experiences, and educational programming that broadens the profession's understanding and growth for these important audiences. We'll focus less on the business cases and more on the practical application and integration of these areas.

2. ELEVATING PLANNER LEARNING EXPERIENCES

Through OneFPA, our local communities will inspire growth and development throughout the organization through "generative leadership" activities. Our more than 2,000 local leaders will create peer-to-peer learning opportunities, help transform FPA's events and conferences, and lead the profession through groundbreaking content development projects. FPA continues to bundle expertise in adult learning theory and financial planning education to shape a world-class content strategy.

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WHY PARTNER WITH FPA

2. ELEVATING PLANNER LEARNING EXPERIENCES (CONTINUED)

As ***the*** home for financial planners, our educational programming reflects the needs of the whole planner. We create and select only the best content for distribution to our membership. We define our content strategy in three core areas:

1

Interpersonal Content

Soft skills, personal development

2

Discipline Depth

CFP education, behavioral finance, ethics, financial planning process skills, and technology skills

3

Systems Depth

Legal and political landscape, social and demographic contexts, progressive changes, practitioner awareness of own challenges, bias and knowledge gaps

3. DEVELOPING TRUE PARTNERSHIPS

Your partnership can unfold in any number of ways. The ultimate goal is a mutually beneficial relationship that shines a light on the financial planning profession in ways that are measurable and meaningful. FPA's leadership believes that deep, sustainable, flexible and beneficial partnerships are where FPA can truly make a differerence for our members, our partners, and our profession. However you want to make your mark on the profession, if your vision aligns with FPA, we'd like to partner with you to make it happen. We encourage firms to engage through the following methods, which offer freedom to grow and shape a distinctly unique path for your firm:

- Underwriting programs
- Supplying educational content
- Conference participation
- Impactful research
- Custom programs

Learn how you can support the growth and development of the financial planning profession.

Contact us at **StrategicPartnerships@OneFPA.org**

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.

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Specialized offerings that provide unique, sometimes exclusive, opportunities to present your firm as a thought-leader or subject-matter-expert to targeted audiences. Prices are contingent upon customized features and marketing benefits.

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Unlock membership packages, special rates, or group discounts for your company, network, or clients.

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ADVERTISING

Explore FPA's Media Kit for further advertising opportunities on our website, membership campaigns, and within the *Journal of Financial Planning*.

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

HOW TO PARTNER WITH FPA

FPA works with all firms that embrace the core policies and strategies that define who we are as an organization, how we shape the profession, and how we serve our members. Through partnership with FPA, these firms experience deep levels of integration and support, so that together, both FPA and partners can enhance the financial planning profession for the benefit of all planners and clients.

For firms that want to make an impression on the financial planning community, FPA offers a range of annual partnership programs dedicated to delivering a customizable experience.

CORNERSTONE PARTNERSHIP

Cornerstone Partnership is the highest level of partnership with FPA and is reserved for a maximum of four firms. The breadth and depth of partnership is unmatched by any other FPA relationship. Partners receive dedicated FPA account management, project management and completely custom project and program exploration and delivery. FPA commits to a baseline relationship with aligned purpose and tactical aspects that also allows for flexible growth and delivery of opportunities to address ongoing branding and marketing integration across the entire organization. Partners at this level are the first recipients of bonus exposure and elevated opportunities, as well as a handful of benefits that are otherwise not available to other partners.

COST: $200,000+

STRATEGIC PARTNERSHIP

An incredibly deep level of partnership with FPA that provides dedicated account management support, custom project and program exploration and delivery, and ongoing branding and marketing integration across the entire organization. Partnership composition is primarily custodians, broker-dealers, high-performing practice management consultants, and annuity, insurance and related providers – all of which have an aligned vision on elevating the financial planning profession.

COST: $100,000+

SUPPORTING PARTNERSHIP

Firms may bundle a variety of tactical elements into a collaborative, annual relationship which enhances the overall FPA experience. Components include advertising and branding, content distribution, membership, conferences, and virtual speaking opportunities.

COST: $40,000+

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

2019 EVENTS OVERVIEW

FPA RETREAT

Hilton La Jolla Torrey Pines, San Diego, CA | May 6–9

The FPA Retreat Conference is the annual celebration and exploration of the "Art and Science of Financial Planning" where those who founded the profession of financial planning gather to transfer the wisdom from their generation to the next.

Sponsorships: $10,000 – $30,000

Attendees 350

Partners 24

FPA NEXGEN GATHERING

Loyola University New Orleans, New Orleans, LA | June 2–4

FPA's NexGen Gathering is grown from an intimate, peer-to-peer retreat-style event in the early 2000's and has propelled the careers of some of the most influential financial planners in the past decade. Talented new professionals come together each year to celebrate their learning and development in a safe space among like-minded friends.

Sponsorships: $3,500 – $7,500

Attendees 125

Partners 12

FPA ADVOCACY DAY & FIDUCIARY SYMPOSIUM

Capitol Hill, Washington, DC | June 5–6

FPA Advocacy Day is an important opportunity for FPA members, financial planning advocates and thought-leaders to gather on Capitol Hill for a two-day event. Attendees dialogue with federal policymakers about our profession while displaying FPA's unified strength as the association dedicated to elevating the financial planning profession.

Sponsorships: $15,000

Attendees 85

Partners 2

FPA RESIDENCY

Hyatt Regency Aurora – Denver Conference Center, Denver, CO | June 7–12 | October 25–30

Our highly-acclaimed FPA Residency Program builds experience in real financial planning scenarios and establishes mentor relationships with preeminent thought-leaders in the profession for new certified financial planners or soon-to-be CFP® professionals. Residents learn how to best communicate with clients through role-playing with mentors and peers to be fully prepared for challenging life situations with clients.

Sponsorships: $10,000 – $50,000

Attendees 25

Partners 1

FPA ANNUAL

Minneapolis Convention Center, Minneapolis, MN | October 16–18

The FPA Annual Conference is one of the largest financial planning conferences held each year, attracting CFP® professionals and financial planning thought leaders from across the globe. Attendees range from young professionals to expert, lifelong planners who are eager to share practical strategies, tactics and knowledge that help lift and enhance the financial planning profession at-large.

Sponsorships: $20,000 – $85,000 | Exhibits: $4,750 – $9,000

Attendees 2,300

Partners 200

OneFPA CHAPTER LEADERS

Gaylord Rockies Resort & Convention Center, Denver, CO | November 15–17

The OneFPA Chapter Leaders Conference is an intimate gathering of 250 FPA Chapter leaders (Presidents, Presidents-elect, Chapter Executives and other Board members), where FPA provides leadership development to tenured and new volunteer leaders and offers resources and information that is critical to the successful management of a membership organization.

Cornerstone + Strategic Partners receive complimentary passes and table exhibits.

Supporting Partners may purchase access to this event for $10,000.

Attendees 250

Partners 6

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.

FPA RETREAT

FPA FINANCIAL PLANNING ASSOCIATION
RETREAT 2019
HILTON LA JOLLA

May 6–9, 2019
Hilton La Jolla
La Jolla, CA

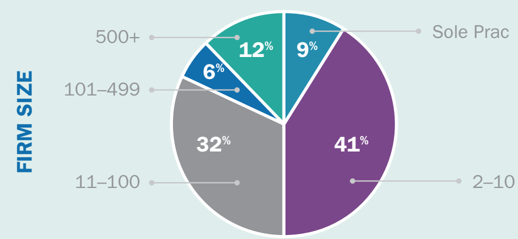
The FPA Retreat Conference is the annual celebration and exploration of the “Art and Science of Financial Planning” where those who founded the profession of financial planning gather to transfer the wisdom from their generation to the next. The nearly 450 attendees have well-established practices of $250MM AUM or higher, on average, and range across the spectrum of fee-only to commission-based planners. The conference provides a unique combination of crowd-sourced content and thought-leadership expertise from FPA’s largest partners and supporters.

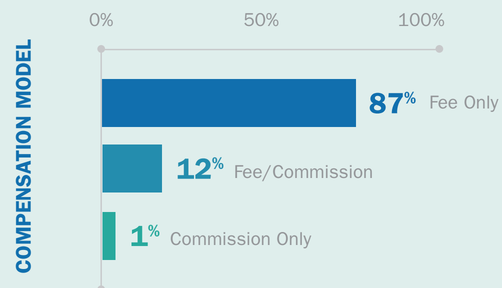
This conference format focuses on the powerful interactions and connections between planners who have come to view each other not just as peers, but as friends and confidantes, and remains a hallmark of the gathering to this day.

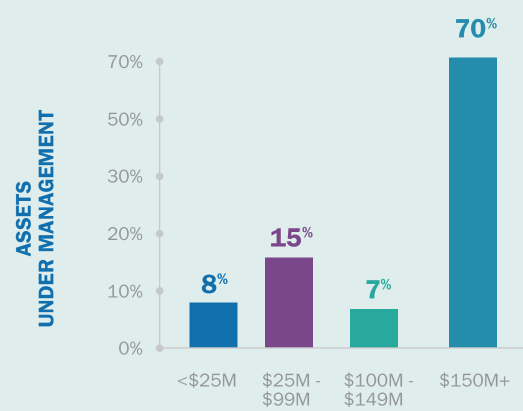
“We had a wonderful time speaking with new business owners, exiting advisors, and many others at a variety of points in their careers and growth journeys.”
— Kem Taylor, FP Transitions

“At every waypoint in my financial planning career—apprentice, senior planner, business leader—Retreat has been a constant contributor to my development, both personally and professionally.” **— Paul K. Fain III, CFP®**

ABOUT THE ATTENDEES







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FPA RETREAT

WAYS TO PARTNER

Partnership Type	Gold	Silver	Bronze	Amenity
Opportunities	2	6	8	6
Speaking Role	Mainstage	Premier	Breakout	N/A
Exhibit Table	x	x	x	x
Attendee	x	x	x	x
Digital Branding[1]	x	x	x	x
Mainstage Recognition	x	x		
Registrations	3	2	1	1
Cost	$30,000 SOLD OUT	$18,000 SOLD OUT	$14,000 SOLD OUT	$12,000+

[1]Digital Branding

Partners will receive exposure in FPA pre-conference marketing, mobile application, printed guides, and other channels that may include social media, blog posts, Journal of Financial Planning ads, etc. Each level of marketing is contingent upon a partner's sponsorship selection.

I've since attended several FPA Retreats and made lasting connections and friendships with people who care as deeply about our profession as I do. I've found that the thoughtful themes of the gathering provide a rich environment for provocative conversations that invariably lead to new ways of thinking and being.

- Debbie Grose, CFP®, 2020 FPA Retreat Task Force Co-Chair

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

FPA RETREAT

HOW TO MAXIMIZE THIS EVENT

Defined by its storied history and powerful legacy, the evolution of FPA Retreat has become in some ways synonymous with the growth and transformation of the financial planning profession. The event has long served as an incubator for knowledge sharing, ideation and the fostering of perspectives focused on the art and science of financial planning through the lenses of the profession's leaders.

The inimitable spirit of the event remains the most important component of FPA Retreat, and the makeup, passion and engagement of those who attend is what truly sets it apart. Lending your voice and presence will help make this year our best yet.

SPEAKING ROLES

Speaking opportunities are based upon selection and review by the FPA Retreat Task Force, comprised of CFP practitioners, FPA leadership and generative thought-leaders within the profession. Partners who truly commit to the FPA content process find their sessions to be highly reviewed and well-attended.

The FPA Learning Team is focused on creating inspiring, engaging and truly unique sessions for attendees. Partners are encouraged to customize in-the-box programming to tailor outcomes specifically for the Retreat audience.

Formats to consider:

- Workshops & Roundtables
- Interactive Lecture
- Overview vs. Deeper Dive
- Continuing the Conversation

Before a partner is accepted into a speaking role for FPA Retreat, a consult with FPA's Education Team is required. A willingness to work within FPA's parameters is required for any FPA Retreat speaker.

AMENITIES

Partners are encouraged to provide amenities within the theme of Retreat, and which enhance the attendee experience. We encourage you to underwrite mindfulness moments, yoga sessions, tea/coffee bars, snack breaks, water bottles, massage stations, notebooks, whiskey/beer tastings and more. Work with FPA to customize your amenity experience to gain maximum value. Contact FPA to see which opportunities are currently available.

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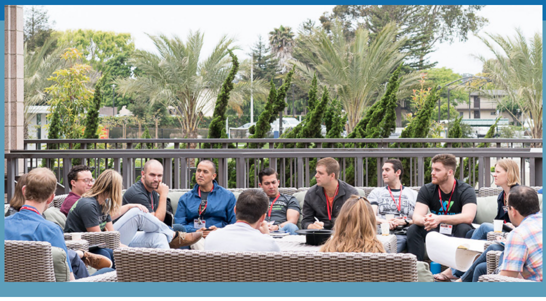
FPA NEXGEN GATHERING



June 2–4, 2019

Loyola University New Orleans

New Orleans, LA

The most well-attended Next Generation event in the profession is FPA's NexGen Gathering. Grown from an intimate, peer-to-peer retreat-style event in the early 2000's, this conference has propelled the careers of some of the most influential financial planners in the past decade. Talented new professionals come together each year to celebrate their learning and development in a safe space among like-minded friends. While housed on college campuses, this event provides a close-knit experience that has attendees returning year after year.

ABOUT THE ATTENDEES

CURRENT FIRM TYPE

66%	RIA's
17%	Other
11%	Dual Registered
3%	Broker-Dealer
3%	Student

ROLE IN THE FIRM/COMPANY

42%	Financial Planner
31%	Owner/Partner
14%	Para-planner/Jr. Planner
11%	Senior Planner
2%	Resident

CERTIFIED FINANCIAL PLANNERS

67%	CFP's
16%	Not a CFP
17%	Preparing For/ Have Passed Exam

Top reasons why planners say they attend:

- To network and make connections
- To hear how others run their practice, what software they use and what services they provide
- Check out what's new in the industry
- To be inspired and grow

What attendees say makes NexGen Gathering unique:

- The specific age group and being able to relate and be relevant
- A place to learn and grow from people who are in the same early stages of career
- This conference is more open and conversational than others
- It's intimate and inspiring where you get to engage with like-minded people

*"The FPA NexGen Gathering is a **"must attend"** for all those new financial planners who are trying to survive and thrive in their early years, and want to find a community of like-minded peers all looking to build long-term successful financial planning careers."* — **Michael Kitces, CFP®**

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FPA NEXGEN GATHERING

WAYS TO PARTNER

Due to the intimate nature of Gathering, only a handful of partners experience this event firsthand. The energy at this event is centered around the future of the profession and helping new planners achieve their personal and professional goals. If your firm has an interest in supporting the next generation of planners, this is the premier event for you. This event will sell out far in advance, so we encourage you inquire quickly to reserve your partnership.

Partnership Type	Presenting	Amenity
Opportunities Available	4	8
Speaking Role	Workshop, Lunch 'n Learn or Live Teaching Session	N/A
Exhibit Table	x	x
Attendee Demographics	x	x
Digital Branding	x	x
Mainstage Recognition	x	
Registrations	2	1
Cost	$7,500	$3,500

[1]Speaking opportunities are reviewed and approved by the NexGen Conference Task Force.
[2]Amenities range from water bottles and mobile apps, to happy hours, off-site events, and more.

HOW TO MAXIMIZE THIS EVENT

This conference is unlike any you've experienced. This is not a traditional lecture-style event with General Sessions or Breakouts. Instead, attendees experience a community-style gathering, complete with peer-led learning sessions, roundtables, and casual lunch-and-learn sessions that cater to an organic, adult-learning environment.

For partners, this means you need to blend into your surroundings, get out from behind the table and engage with planners in their comfort zone. Due to the limited number of partner opportunities each year, our attendees have a huge hand in selecting and rating the partners who attend this event. It is the duty of the partner firm to make a positive impact on the attendees to receive the opportunity to sponsor or exhibit in following years.

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FPA ADVOCACY DAY & FIDUCIARY SYMPOSIUM

June 5–6, 2019
Capitol Hill
Washington, D.C.

FPA Advocacy Day is an important opportunity for FPA members, financial planning advocates and thought-leaders to gather on Capitol Hill for a two-day summit where they dialogue with federal policymakers about our profession while displaying FPA's strength as the association for all CFP® professionals. Participating will empower you to positively interact with policymakers to help advocate for issues that are crucial to financial planners and build a strong future for the profession.

PARTICIPATION OPPORTUNITIES

Partners are invited to join FPA for a $15,000 commitment, which includes branding and media coverage, as well as:

- Ten passes to the event
- Invitations to luncheon/dinners and other key activities
- Podium recognition from FPA Leadership
- National recognition alongside FPA
- Joint meetings with politicians to discuss Capitol Hill policy alongside FPA and other financial planning profession executives on key financial planning initiatives

"Very powerful event, in terms of advancing the profession over the long run."

— Dr. Ron Rhoades, CFP® Kentucky

"I'm proud of how well received FPA is: we are music to our Members of Congress' ears as opposed to what they are used to. These four years have elevated our reputation and sincere gratitude for those who work so hard to make things happen seamlessly."

— Cathy Seeber, CFP® Delaware

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FPA RESIDENCY

June 7–12, 2019 | October 25–30, 2019

Hyatt Regency Aurora

Denver Conference Center

Denver, CO

Our highly-acclaimed FPA Residency Program builds experience in real financial planning scenarios and establishes mentor relationships with preeminent thought-leaders in the profession for new Certified Financial Planners or soon-to-be CFP® professionals. Residents learn how to best communicate with clients through role-playing with mentors and peers to be fully prepared for challenging life situations with clients. Additionally, participants can earn 28 CFP continuing education credits or three months of experience toward the CFP Board's three-year requirement.

There are three levels of partnership around FPA Residency:

Partnership Type	Exclusive Partner	Underwriting Partner	Supporting Partner
Summary	Reserve an entire Residency session for your firm. Deans and FPA staff will create a one-off Residency program just for your advisors. All program costs covered by your sponsorship.	Receive branding and media attention alongside FPA. Includes access to the private Residency event, with branding and networking opportunities.	Receive access to the private Residency event, with branding and networking opportunities.
Branding	Custom branding for your company, such as: FPA Residency, provided for "Partner" Additional branding included as determined by FPA & Partner FPA Press Release	FPA Residency, Provided by FPA and "Partner(s)" Logo included on Residency Session website & onsite signage Opportunity to network with Deans and Participants at sponsored Happy Hour FPA Press Release	No naming rights Logo included on Residency Session website & onsite signage Opportunity to network with Deans and Participants at sponsored Happy Hour No Press Release
Attendance	20 per session	Send up to 5 advisors	Send up to 3 advisors
Exclusivity	Yes	No	No
Cost	$50,000	$25,000	$10,000

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FPA RESIDENCY

WHO ATTENDS THE PROGRAM?

- *Anyone who has completed the required CFP Board-registered program and is eligible to sit for the CFP Certification Examination.*
- *Anyone who is a CFP professional and has held the designation for three years or less.*
- *Anyone who is a CFP professional who holds the designation and is either:*
    - Not practicing financial planning for a period of time;
    - Not doing client facing financial planning;
    - Or wants more training doing the comprehensive, client-centered approach to financial planning.

"I came here wanting to think like a financial planner. Now I know I need to focus on having the heart of a financial planner." **— Jim, 2017 FPA Residency resident**

"I signed up over a year ago and was put on the wait list. I'm so glad for that because this group was incredible!"

— Karina, 2017 Residency resident

"I came here to get myself out of my comfort zone. My team created a safe place to learn. I got so much out of this experience." **— Rick, 2017 FPA Residency resident**

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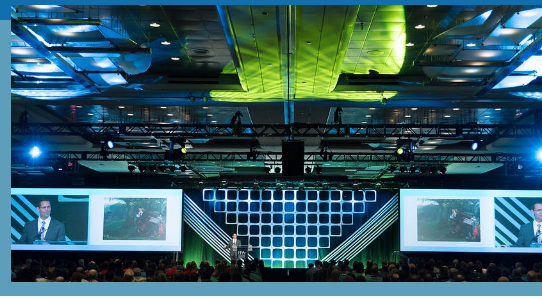
FPA ANNUAL



October 16–18, 2019
Minneapolis Convention Center
Minneapolis, MN

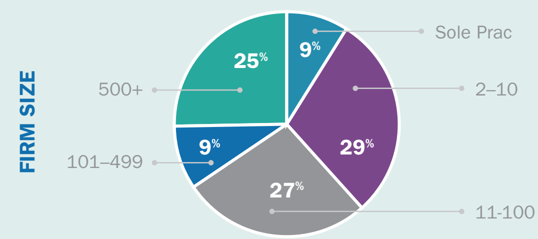
The FPA Annual Conference is one of the largest financial planning conferences held each year, attracting CFP® professionals and financial planning thought leaders from across the globe. Attendees range from young professionals to expert, lifelong planners who are eager to share practical strategies, tactics and knowledge that help lift and enhance the financial planning profession at-large.

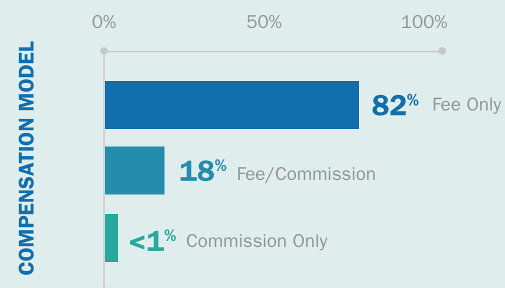
Become a part of something greater and discover all the ways your firm can support the growth and development of the financial planning profession at the FPA Annual Conference. Meet planners from all backgrounds and influence key decision makers from some of the largest and most renowned firms in the profession. Showcase your expertise and dedication to the profession in ways that captivate and delight financial planning attendees.

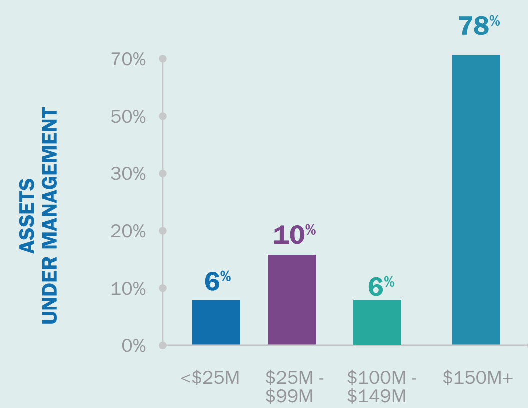
WAYS TO PARTNER

- Exhibit Booth and/or FinTech Exhibit
- Speak in Educational Sessions
- Underwrite Events and Amenities

ABOUT THE ATTENDEES







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FPA ANNUAL

EXHIBITING

Exhibit Booth	Tier 1 Location	Tier 2 Location
10x10 Booth	$9,000	$7,000
Additional 10x10 Add-on Rate	+ $6,000	+ $4,500

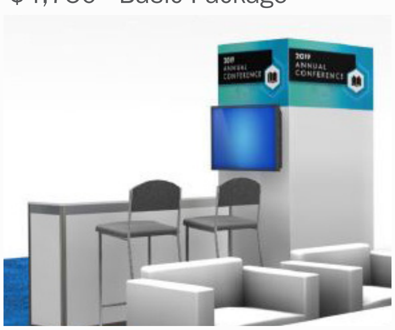
EXHIBIT BOOTHS include 2 conference registrations, pre/post attendee list, company listing within conference marketing, piped and draped space, and access to conference Wifi. Booth purchase does not include table, chairs, electrical, hard-line internet, or carpeting.

- Tier 1 locations are premier areas with optimal traffic patterns.
- Tier 2 locations are all other non-reserved booth areas.

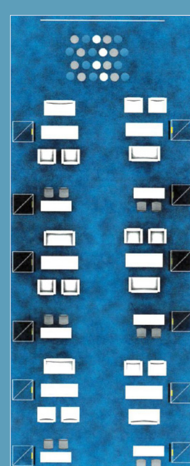
FINTECH SHOWCASE EXHIBITS are individual kiosks reserved within the FinTech Showcase in the main exhibit hall. Both options include pre/post attendee list, company listing within conference marketing, name on pylon above monitor, one monitor, power and access to conference Wifi. ***Registration by August 1 includes a 10-minute presentation on the LED wall.*** There are two furnishing packages noted below, as well as branding upgrade options:

FINTECH SHOWCASE PACKAGES

$4,750 - Basic Package



- Two bar stools
- One bar-height table
- One full conference registration



$6,750 - Upgraded Package

- Powered coffee table
- One 2-person couch
- Two soft-seat chairs
- Two full conference registrations

Inquire about branding add-ons and enhancements to your table, pylon and bar-height table!

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

FPA ANNUAL

SPEAKING SPONSORSHIPS

Partnership Type	Silver	Bronze (60 min)	Bronze (30 min)
Opportunities Available	10	8	8
Speaking Role	60-minute Breakout *Optimal agenda placement*	60-minute Workshop *Typically breakfast placement*	30-minute Kick-Start
10x10 Exhibit Booth or FinTech Exhibit	x	x	x
Attendee Demographics	x	x	x
Digital Branding	x	x	x
Mainstage Recognition	x		
Registrations	3	2	2
Cost	4 LEFT $40,000	1 LEFT $25,000	SOLD OUT $18,000

SPEAKING ROLES

Our goal with Annual is to deliver the latest trends from the best and the brightest minds in the profession, and to help participants share knowledge and insights to become more effective, efficient and prosperous. We encourage you to offer the following two types of speaking sessions:

30-MINUTE KICK-START: Kickstart programming focuses on interactive, problem solving content. Participants work to produce a product, solve a problem and walk away with 1-3 tools or solutions that they can implement into their life and/or work. The intent is ***not*** to pack 60 minutes of content into 30 minutes, so keep that in mind when selecting a 30 minute session.

60-MINUTE WORKSHOP: A workshop is a more traditional 60-minute program that will illuminate different perspectives and experiences on the same topic. Workshops will provide the framework for peer-to-peer sharing, knowledge exchange and subsequent discussion. Slides and handouts can be provided in the mobile app for all attendees to access.

AMENITIES

We highly recommend add-ons to your booth or sponsorship to maximize your attendee interactions awareness campaign. Options include headshots, beer/wine tasting, lanyards, parties/receptions, massages, lawn games, and more. Contact FPA to see which amenities are still available.

Prices range from $1,500 - $50,000

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

FPA ANNUAL

UNIQUE SPONSORSHIPS

FINTECH SHOWCASE:

Take over the ***FinTech Showcase*** footprint with top-line, underwriting branding and video marketing, a 10x20 booth with close proximity to a hosted bar, and rotating logo on the LED wall. Includes a 60-minute FinTech Breakout session during the conference.
(1 available) $30,000

BUSINESS CONSULTING:
Underwrite the ***FPA Coaches Corner*** practice management consulting program at the conference, including top-line underwriting and branding exposure, a 10x20 booth, and introductions at all the Business Coaching conference sessions. ***Recognized as FPA's Coaches Corner, presented by (your name) for the remainder of the year.*** Branding on Coaches Corner digital marketing to FPA membership, and one stand-alone email blast.
(1 available) $30,000

STUDENTS:
There are multiple student and next generation activities and programs to underwrite at the FPA Annual Conference:

Student Programming can be completely branded and underwritten and includes an exhibit booth and one student workshop. Typical turnout is 50+ attendees.
(1 available) $15,000

New Planner Breakfast welcomes students, new planners, NexGen, and other self-selected young professionals to the conference on the first morning of the event. Includes opportunity to address the crowd for several minutes, branding and introductions to the audience.
(2 available) $15,000

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.

STUDENTS: (CONTINUED)

Student Power Networking Reception welcomes students, new planners, NexGen, and other self-selected young professionals to share common challenges in a reception-style evening function with rotating, roundtable discussions led by leaders within the profession. Turnout is 200+ student/NexGen attendees.

•

(1 available) Headline Partner: $15,000

- 2-3 minutes on the microphone for introductions
- Headline branding:

  *"**FPA Student Power Networking Reception, Offered by (Your Company) and Partners**"*
- Select and host a Table Topic during the reception
- Logo on Next Generation conference t-shirts
- 2 conference registrations

•

(5 available) Underwriting Partner: $5,000

- Logo recognition on student programming
- Select and host a Table Topic during the reception
- 1 conference registration

RIAs receive a $3,000 Underwriting Partner rate

NEXGEN:

The NexGen Lounge can be branded and includes an adjacent 10x10 booth and ***NexGen Lounge Activities*** sponsorship, 2 conference registrations, and branding in the NexGen Lounge.
(4 available) $12,000

You're a Financial Planner, Now What? Podcast is available for exclusive underwriting at the conference. Includes logo placement on podcast glass wall, ability to interview the podcast host/or other in-person thought leader of your choice in a video broadcast on FPA Activate Facebook Group, 30 second commercials on a NexGen podcast recorded onsite, and a 10x10 booth.
(1 available) $20,000

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

NEXGEN: (CONTINUED)

NexGen Mini Talks are available for underwriting and support, which includes branding and introductions on the session.
(1 available) $5,000

NexGen T-shirts are available to showcase your support of the next generation of financial planners. Sponsorship includes your logo on the back of the t-shirt. All students and NexGen attendees receive a shirt if stopping by the New Planner Breakfast, the NexGen Lounge or your booth! Approximately 300 attendees to receive a shirt.
(6 available) $1,500

INTERNATIONAL:
The International Sponsorship features a reception that welcomes all international attendees to network and engage with planners from across the globe in a casual-style reception with several internationally recognized faces within the financial planning profession. Sponsorship includes 5 complimentary conference registrations, branding on the international functions, ability to speak in an international breakout session or panel discussion, and several minutes on the microphone to kick-off the International Reception.
(1 available) $20,000

DIVERSITY:
Several diverse communities exist within FPA, including ***African American, Latino, Asian, Female, and LGBTQ financial planners.*** To underwrite a specific community, please contact FPA. We are accepting underwriting partners to provide content support and awareness for the greater financial planning community. Support any one of these communities at FPA Annual Conference, which includes branding, exclusive access to the community functions, and sponsorship and participation in a Knowledge Circle conversation onsite. <u>Only one partner allowed per community</u>.
$5,000 per community - contact FPA for more details

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

ONEFPA CHAPTER LEADERS

November 15–17, 2019

Gaylord Rockies Resort & Convention Center

Denver, CO

The OneFPA Chapter Leaders Conference is an intimate gathering of 250 FPA Chapter leaders (Presidents, Presidents-elect, Chapter Executives and other Board members), where FPA provides leadership development to tenured and new volunteer leaders and offers resources and information that is critical to the successful management of a membership organization.

Only FPA's most trusted and integrated partners are eligible to attend this conference:

FPA Cornerstone & Strategic Partners
Receive complimentary table exhibit and 2 registrations.
Opportunities including breakouts, workshops, keynotes, and amenities are available at an additional expense.

FPA Supporting Partners
Receive the opportunity to purchase a table exhibit and 2 registrations for $12,000.
Opportunities including breakouts, workshops, keynotes, and amenities are available at an additional expense.

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

2019 PROGRAMS OVERVIEW

CUSTOM E-LEARNING SERIES

Virtual Learning

FPA will aid in development of a webinar program that is available on FPA's website, or through your firm's own platform, and will consult on how to integrate adult-learning theory, and how to access CFP continuing education credit, if applicable. This is entirely customizeable and unique per partner.

Sponsorships: $15,000+

Reach	**500+**
Partners	**3**

FPA JOURNAL IN THE ROUND WEBINARS

Virtual Learning

FPA members look forward to each month's *Journal in the Round* expert-hosted webinar which takes planners on a journey through the current month's highest rated article with panelists, authors and editorial staff to unlock further insight on timely content.

Sponsorships: $3,500/month

Reach	**300+**
Partners	**12**

FPA LEADERSHIP INSTITUTE

Virtual Learning

FPA is creating a leadership learning program that takes financial planners on an educational path from novice, to master, to expert leader. Join us on this journey and either support the general program for all FPA members, or carve out a dedicated path for your firm's financial planners.

Sponsorships: $25,000/year with 2 year minimum commitment

Reach	**2,500**
Partners	**2**

NEW PLANNER PODCAST

Virtual Learning

Position your firm at the forefront of a financial planner career path by aligning with Hannah Moore's *"You're a Financial Planner, Now What?"* podcast. Free for all financial planners, this podcast sees over 67,000 unique downloads each year.

Sponsorships: $5,000/month

Reach	**67,000**
Partners	**12**

FPA MEMBER DISCOUNT PROGRAM

Membership Marketing & Benefits Program

Engage with FPA members through marketing and branding opportunities typically unavailable to any other FPA partners include special FPA banner advertisements, membership communications, email marketing and other sources of channel-based marketing messages.

Partnerships: $2,500 – $5,000

Reach	**23,000**
Partners	**80**

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

2019 PROGRAMS OVERVIEW, *CONTINUED*

FPA RESEARCH AND PRACTICE INSTITUTE

Membership & Media Program

Build custom research projects with FPA that capitalize on FPA media relationships and over 23,000 members. Only three annual partner opportunities exist and sell out quickly. Work with FPA to design your next research project, including press engagements at FPA events, sessions and white papers.

Partnerships: $35,000

Reach	100,000+
Partners	3

FPA COMMUNITIES

Membership Program

FPA has over 7 diverse communities organized through the national office. Work with FPA and our passionnate members to underwrite and work directly with our various community leadership teams. Opportunities include research, scholarships, educational programs, and branding.

Partnerships: $6,000 - $20,000

Reach	varies
Partners	7

NEXT GENERATION PLANNER

Membership Publication

FPA's new app-based publication is gaining popularity since March's launch and isn't slowing down anytime soon. Partners can underwrite this publication, receive ediorial opportunities, and align their brand directly with FPA in support of the next generation of financial planners. FPA does not sell advertisements within the publication to preserve the authenticity of voice from FPA and our Founding Partners.

Partnerships: $20,000/year

Reach	23,000
Partners	4

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

VIRTUAL EDUCATION

CUSTOM E-LEARNING SERIES

Partner with FPA to create a multi-part educational program, delivered virtually (or in-person) to FPA members and targeted audiences as identified in partnership with FPA and co-creator. Leverage FPA's dynamic and inspired expertise to customize a learning program that hits all the high notes for our audiences and positions your firm as a subject-matter-expert and thought leader who is equally dedicated to shaping our profession.

Customization may include CFP CE-approved content, use of consultant hours for strategic development, and FPA marketing distribution elements.

Packages start at
$15,000
for a 3-part virtual course

FPA JOURNAL IN THE ROUND WEBINARS

Engage with FPA members through our most-trusted and well-attended monthly webinars, where FPA digs into the most recent Journal of Financial Planning content, and uncovers layers of additional insight with authors, thought-leaders and other subject-matter-experts. Underwriting sponsorships include branding, commercials for several minutes prior to the session start time while attendees are logging on, attendee demographic information, and the ability to act as a host or contributor for one of the webinars. Sponsorship includes a full-page ad in the digital Journal of Financial Planning. Typical attendance is / 300-500 registrants.

Prices start at
$3,500 **per month**

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

VIRTUAL EDUCATION

FPA LEADERSHIP INSTITUTE

FPA curates talented leaders across our organization through community engagement, educational programming, and a number of leadership opportunities which inspire even the most diverse leaders to grow and learn for the benefit of the profession-at-large.

In 2019, FPA is launching a new platform aimed at supporting these leaders, incorporating the more than 2,000 volunteer leaders across FPA's Chapter Network, through customized leadership content.

To underwrite this leadership venture, partners are asked to commit resources including any in-house custom content, internal thought-leaders, and dollars to create a remarkable platform that will elevate the profession and position your firm at the center of a profession-shaping venture. Benefits include access to the volunteer participants, top-line branding and media exposure, and much more.

Underwriting starts at
$25,000 and requires a
minimum 2-year commitment

NEW PLANNER PODCAST

Hannah Moore's podcast, "You're a Financial Planner…*Now What?*" explores topics relevant to those starting out as financial planners. From designations, to business models, to the history of financial planning, planners can find the resources and knowledge that they need to be successful. The podcast airs every Tuesday, and is free through all major podcast platforms.

67,000
Unique downloads in 2018

700
Downloads per episode in first week

YOU'RE A FINANCIAL PLANNER...
NOW WHAT?

UNDERWRITING PODCAST PARTNER:

- Two 30 second commercials in a verbal format, either spoken by the podcast host, or offered as pre-recorded content from the Underwriting partner. The content should be provided either in written format or pre-recorded, or FPA can coordinate the recording of the message.
- Logo recognition and link on podcast landing page during month of underwriting.
- All parties expected to promote the podcasts via social and digital marketing.

Underwriting starts at
$5,000 **per month**

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

FPA MEMBER DISCOUNT PROGRAM

MEMBER DISCOUNT PROGRAM (MDP)

Does your company offer products or services that can help financial planners run their businesses more successfully? Help us power the profession of financial planning by becoming a Member Discount Partner.

Financial Planning products and services, education providers, insurance firms and consultants are eligible for consideration as a Member Discount Partner. FPA is always vetting top-notch businesses, partnering with those that highlight quality, preferred or custom services (offered at better than market rates), and who share FPA's aim of elevating the profession. Depending upon your level of commitment, various marketing opportunities are available, which position your firm at the forefront of FPA member communications.

Benefits	**Basic** Discount Partner	**Enhanced** Discount Partner
Use of FPA's Proud Partner logo	X	X
FPA-hosted splash pages (public & private)	X	X
Inclusion in the FPA Member Benefits Guide	X	X
1-month rotating banner ad on FPA's Discount Program web pages	X	X
1-month skyscraper banner ad hosted in the digital *Journal of Financial Planning* (to link to rich content)		
1 full page digital ad in the *Journal of Financial Planning** (Placement based upon open inventory at the time of reservation)		X
Pre-recorded webinars posted on FPA's web pages		X
Live webinars hosted on your platform and promoted by FPA		X
Ability to submit educational content for consideration on FPA blogs/forums		X
1x use of the FPA direct mail list (no email)		X
Annual Investment (no conference)	**$2,500**	**$5,000**

*FinTech partners will also be included in a cumulative ad in the Technology issue of the *Journal of Financial Planning*.

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

RESEARCH & PRACTICE INSTITUTE

2018 RESEARCH PROJECTS:

Succession Challenge 2018
FPA revealed research and whitepapers in partnership with Janus Henderson Investors that uncovered the challenge financial planners have in planning their eventual transition out of business.

2018 Trends in Investing
FPA and the Journal of Financial Planning partnered to conduct annual research on investing trends for 2018 and beyond.

State of Client Understanding
FPA partnered with Capital Preferences and T. Rowe Price to conduct new research on the steps financial professionals take to understand their clients and build relationships.

2019 RESEARCH PROJECTS:

FPA offers spring, summer and fall research partnerships. All planned 2019 research partnerships are sold-out, however we are always considering unique research ideas for now and the future. Please connect with FPA to discover ways to partner on research for 2020.

Research Partnerships are $35,000 and include:
- Field research support and data aggregation
- Summary reports and topline findings
- Press release & media interviews
- Panel discussion/breakout session at an FPA event
- Creation of white papers and other related content

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

FPA COMMUNITIES

FPA offers virtual communities (Knowledge Circles) to encourage peer-to-peer learning and transference of wisdom centered around key themes. Each Knowledge Circle includes volunteer hosts who guide the content calendar and oversee speaker selection and preparation. These communities are actively seeking partner support to underwrite their activities throughout the year. While most of their content takes place virtually, there are also in-person discussions at FPA's major conferences.

FPA Knowledge Circles available for underwriting support:

Business Support	569 members
FPA Latino	32 members*
International & Cross-Border	834 members
Investment Planning	359 members
Pride Planners	40 members*
Tax & Estate Planning	665 members
Women & Finance	1100 members

(numbers as of February 13, 2019)

*Brand new communities started in 2019

Underwriting benefits include logo displayed on community conversation threads, placement of content that thematically aligns with editorial calendar, private meetings with Knowledge Circle hosts to understand content opportunities, participation in a minimum of one Knowledge Circle discussion, branding on in-person FPA conference Knowledge Circle discussions, and more. Calls occur monthly in most communities and see anywhere from 30-50 participants on each call.

(1 sponsorship available per community) $6,000

FPA CONNECT APP

Meet members where they are through the FPA Connect Mobile App. This app enables FPA members to access and participate in conversations, Knowledge Circles, resources, mentoring opportunities, and conference information all through their mobile device. Help bring FPA's proprietary, compliance-friendly resource to FPA members with this new member benefit.

Underwriting sponsorship includes branding on the app, exclusive advertising opportunities and title sponsorship on the email communications to members reminding them to download the app.

$20,000 for the year or $15,000 for multi-year commitments

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

NEXT GENERATION PLANNER

OUR NEWEST NEXGEN PUBLICATION: *LAUNCHED MARCH 26, 2019*

The *Next Generation Planner* is a monthly app-based publication designed for those new to the financial planning profession. Content is generated by an editorial board comprised of financial planners and FPA professionals.

FOUNDING PARTNER: NEXT GENERATION PLANNER

An extensive publication underwriting engagement available exclusively to a maximum of four, deeply committed, year-round Strategic partners. Includes a number of touch points, strategic discussions, and exclusive exposure to FPA's highly-coveted NexGen Planner audience. This is an opportunity to elevate and enhance education and resources for the next generation of financial planners through monetary and thought-leadership support of a new and highly-read digital publication.

(4 available) $20,000/year

Selection of Partners

- Requires an existing, deep and trusting relationship with FPA
- Requires a minimum 1-year commitment to elevating the profession, working alongside FPA and our next generation programs and leaders
- Requires an understanding of FPA editorial process and ability to "share, don't sell"
- Requires review and acceptance by the editorial team

Benefits to Partners

- Integration with FPA editorial team & ability to submit content
- Recognized on a "Thank You" page in each publication
- Exclusive advertisement space
- Logo recognition as a Founding Partner in select marketing messages

"Cool stuff. Looking forward to more."
FPA NexGen Member

"Excellent resource for personal financial planning program students!"
FPA Faculty Member

1,139 App Downloads

1,591 Issues Read

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

MEMBERSHIPS

GROUP MEMBERSHIPS

FPA Group Membership is an easy and efficient way for your office to manage individual FPA memberships through one centralized point. Group membership offers a single consolidated invoice and discounts.

Cost: $250 administration fee + one payment for all memberships

Group Membership Benefits:

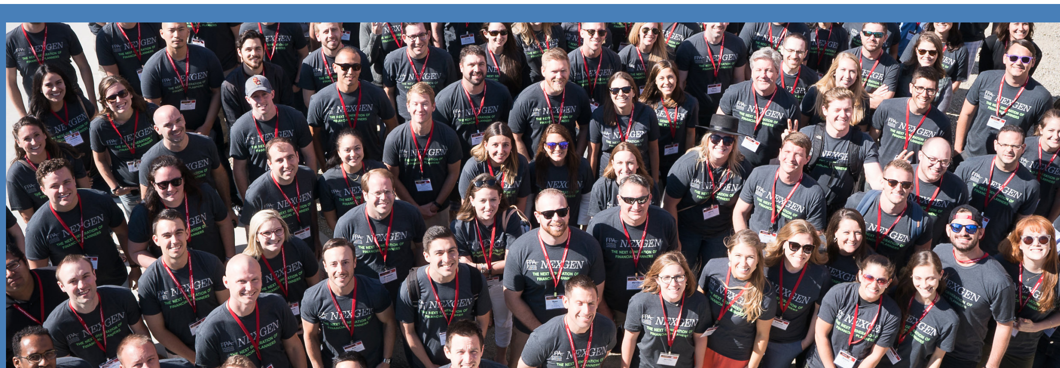
- 15% off individual FPA membership dues*
- 10% off FPA national conferences (FPA Annual Conference and the FPA Retreat)
- Free live webinars and six free on-demand webinars
- Recognition at the FPA Annual Conference
- Use of FPA group member logo
- Plus, all the benefits of individual FPA membership!

*Discount valid for CFP® Professional and Allied Professional membership dues only. Not valid with any other offer, promotion, or discount.

COMPANY MEMBERSHIPS

Firms with several hundred advisors have options available to secure a discount on FPA membership, personalized materials to promote the membership benefits, and specialized benefit packages including private communities, access to virtual learning or in-person learning events, discounted access to world class conferences and learning experiences, and more.

Rates vary by career stage and location. Work with FPA to set a custom pricing model for your firm.



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CHAPTER SPONSORSHIPS

ENGAGE LOCALLY

FPA has national reach through 86 local chapter communities across the US. Each chapter hosts a variety of events which may include in-person networking, CE presentations, half-day/multi-day conferences, Pro Bono Days and Advocacy Days. Many chapters are accepting new and renewing partners on an ongoing basis. To learn more about which chapters and events may be of benefit to add into your FPA national relationship, contact us.

BOOSTED PARTNERSHIP LEVELS

In support of the OneFPA Network plan, FPA Partners who spend a certain amount regionally, coupled with a national event/advertising package, can enjoy an even higher level of FPA partnership and recognition across the organization.

Strategic Partner Level

- $50,000 = National Spend
- $75,000+ = Regional Spend

Cornerstone Partner Level

- $100,000 National Spend
- $100,000+ Regional Spend

2019 CHAPTER COMMUNITIES

FPA OF FLORIDA

Joe Grimes, Chapter Executive
(303) 867-7186
jgrimes@onefpa.org

FPA OF ILLINOIS

Kristin Prine, Chapter Executive
(303) 867-7185
kprine@onefpa.org

FPA OF METRO NEW YORK

Clary Delano, Chapter Executive
(303) 867-7187
cdelano@onefpa.org

Arkansas, Austin, Baton Rouge, Central California, Central Florida, Central New York, Central Ohio, Central Oklahoma, Central Pennsylvania, Central Virginia, Charlotte, Colorado, Connecticut-Fairfield County, Connecticut-Greater New Haven, Connecticut Valley, Dallas / Fort Worth, East Tennessee, Eastern Iowa, Georgia, Greater Indiana, Greater Kansas City, Greater Memphis, Greater New Orleans, Greater Phoenix, Greater Rochester New York, Greater St. Louis, Gulf States, Hampton Roads, Hawaii, Houston, Idaho, Illinois, Iowa, Kansas, Kentuckiana, Long Island, Los Angeles, Maryland, Massachusetts, Metro New York, Miami, Michigan, Mid-Oregon, Middle Tennessee, Minnesota, Mississippi, Nebraska, New Jersey, North Alabama, Northeast Florida, Northeast Ohio, Northeastern New York, Northern California, Northern New England, Orange County, Oregon & S.W. Washington, Pittsburgh, Puget Sound, Rhode Island, San Antonio & South Texas, San Diego, San Francisco, San Gabriel Valley, Silicon Valley, South Carolina, South Florida, Southern Arizona, Southern Colorado, Southwest Florida, Southwestern Ohio, Spokane, Tampa Bay, The East Bay, The Greater Hudson Valley, The National Capital Area, The Philadelphia Tri-State Area, The Southern Tier of New York, The Suncoast, The Triangle, The West Valleys, Tulsa, Utah, Ventura County, West Texas, Western New York, & Wisconsin.

For more information on partnering with FPA, please contact **StrategicPartnerships@OneFPA.org** or call 800.322.4237 Option 5.

THANK YOU TO OUR PARTNERS!

FPA Cornerstone Partners

FPA Strategic Partners

FPA Supporting Partners

Over 200+ other partners *(not all pictured)*

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