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 22,000 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.

TOTAL MEMBERS: 21,932
TOTAL CERTIFIED FINANCIAL PLANNERS™ 14,873

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.

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, FPA Strategic Partner

IN 2020, OUR FOCUS IS ON:

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.

EMBRACING THE 21ST CENTURY OF FINANCIAL PLANNING
As fee compression and consolidation take over the profession, the challenges facing planners force new thinking around advisor value, smart business planning, and behavioral psychology. Ground-breaking research, case studies and emerging technologies are key to staying relevant.

ELEVATING PLANNER LEARNING EXPERIENCES
FPA bundles expertise in adult learning theory and financial planning education to shape a world-class content strategy. 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.

INTEGRATION POINTS

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>30%</td>
<td>30% of FPA conference content came from FPA partners</td>
</tr>
<tr>
<td>60%</td>
<td>60% of FPA webinar attendees viewed partnered content</td>
</tr>
<tr>
<td>18%</td>
<td>18% of FPA members have personal insurance through FPA partners</td>
</tr>
<tr>
<td>55%</td>
<td>55% of FPA's Journal in the Round presentations were delivered with partner support</td>
</tr>
</tbody>
</table>

Integration points as of December 31, 2018.

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

TRUE PARTNERSHIPS BUILT ON SOLID FOUNDATIONS

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 difference 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.

Elements of FPA Partnership

- Underwriting programs
- Conference Participation
- Supplying Educational Content
- Impactful Research
- Custom Programs
- Elements of FPA Partnership

Are you ready to support the growth and development of the financial planning profession? Let’s do something remarkable together.
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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For more information on partnering with FPA, please contact [StrategicPartnerships@OneFPA.org](mailto:StrategicPartnerships@OneFPA.org) or call 800.322.4237 Option 5.
PARTNERSHIP LEVELS

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+

CLASSIC PARTNERSHIP
Align your brand with FPA and unlock 15 FPA memberships, a lowest-rate guarantee on FPA events, logo recognition on the FPA website, 15% off additional memberships and FPA’s local chapter list.

COST: $6,000+

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.
FPA RETREAT
Hyatt Regency Lost Pines Resort & Spa, Cedar Creek, TX  |  May 4–7
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: $8,000 – $25,000

FPA ADVOCACY DAY & FIDUCIARY SYMPOSIUM
Capitol Hill, Washington, DC  |  June 2–3
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

FPA NEXGEN GATHERING
Sahara Las Vegas, Las Vegas, NV  |  June 21-24
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 – $15,000

FPA RESIDENCY
Hyatt Regency Aurora – Denver Conference Center, Denver, CO  |  June & October
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: $35,000 per event

FPA ANNUAL
Phoenix Convention Center, Phoenix, AZ  | September 30–October 2
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: $12,500 – $38,000 | 10x10 Exhibits: $7,500 – $8,500

OneFPA CHAPTER LEADERS
Gaylord Rockies Resort & Convention Center, Denver, CO  |  November 6–8
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 attendance.
Association Partners: $3,500  |  Financial Profession Partners: $7,500

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

May 4–7, 2020
Hyatt Lost Pines
Cedar Creek, TX

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 wisdom from their generation to the next. The nearly 400 attendees have well-established practices of $250M AUM or higher, on average, and are primarily fee-only or fee-based planners. 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 confidants, and remains a hallmark of the gathering to this day.

“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®

HOW TO MAXIMIZE THIS EVENT

FPA Retreat is not your traditional lecture-style conference. Your wisdom, leadership and support, when engaged correctly, allows attendees to freely press the boundaries of financial planning by exploring new ways of serving clients and growing modern planning practices. Your contributions are important to ensuring a safe environment free of product-pitches and geared towards the ultra-intelligent financial planner who is looking for “what’s next?” Partners should avoid standing behind table exhibits and bring along giveaways that are high-quality and unique to the event. Attendee feedback helps identify which partners are invited to return in following years.

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

Affiliate your brand with FPA's flagship event and enjoy exclusive access to FPA's elite members and respected leaders within our profession. We offer limited partnership opportunities which sell out quickly.

PLATINUM | $25,000  This is the best value for FPA Retreat. Provide a 60-minute solo-session with the speaker of your choice (FPA Task Force approval required), and you also can select from the largest branding and experience-driven opportunities at the conference (below). Includes two conference attendees and a table.

Arrival Experience
Greet attendees as they arrive with welcoming signage in the lobby, snacks and beverages, complete with baby goats or an alpaca from the onsite petting zoo!

Kick-Off Reception
Welcome attendees with drinks and dinner on the first night of the conference. Enjoy high-level branding, private invite to all attendees, and an Austin-themed experience.

Closing Night Party
Reward attendees for their hard work with an awesome closing party! Live stage recognition, high level branding and logo placement, and a night attendees won’t forget.

General Session + Meet & Greet
Introduce a General Session speaker and enjoy high-level branding and logo placement, and a private one-hour reception with the speaker and select attendees.

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

GOLD | $20,000  Join a breakout session in partnership with 1-2 other well-respected names in the financial planning space (may be other Gold Partners). Topics are created in collaboration with FPA Retreat Task Force & FPA education team, and roles will be filled as approved by all parties. Session format is dynamic and may incorporate debates, round table discussions, TED talks, live Q&A, and digging into case studies. A financial planning practitioner may be allocated to facilitate the session and guide peer-to-peer learning. Includes two attendees and a table.

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.
### WAYS TO PARTNER (CONTINUED)

**SILVER | $12,000** Dive into FPA Retreat with an attendee experience that no one will forget. From s’mores at the fire pit to an Austin distillery tasting, your brand will leave a lasting impression for Retreat attendees. Includes two attendees, a table, and full page ad in the conference notebook.

**Tasting Experience**  
Bourbon, tequila, local craft beer - whatever your flavor, bring it to the Retreat attendees. Includes 200 tickets for a tasting experience that will be the talk of the show.

**Fire Pits & S’mores**  
After a full day of learning and catching up with friends, provide branded marshmallows and s’mores kits, sticks and let the good times roll.

**Massage Station**  
There’s nothing that says ‘FPA Retreat’ more than a relaxing massage. Experience includes massage team for two full days and high level branding and marketing.

**Glow Golf Experience**  
Back for another year - with a twist - Glow Golf (formerly Goofy Golf) offers a mini-golf course and lawn games with an open bar. This is an attendee favorite!

**Midnight Food Truck**  
Be the late night hero! Keep the connections and conversations flowing at the fire pits with some midnight snacks from the food truck, with high level branding.

**Cowboy Boot Station**  
Reward a number of attendees with a pair of authentic Texas cowboy boots fitted right from your exhibit space. Includes the boots and staff for fittings.

**BRONZE | $8,000** An effective way to experience FPA Retreat while also showcasing your company in ways that enhance the traditional attendee experience. Choose from one of the most practical attendee branding opportunities like the conference notebook, wifi, or coffee/snack breaks. Or sponsor a small group event and allow FPA to send invites to attendees on your behalf for special events (limited space) like Horseback Rides or a Clay Shoot. Includes one attendee, a table and half page ad in the conference notebook.

**Conference Notebook**  
Includes branded wrap on notebook and first inside page advertisement.

**Coffee Station**  
Provide a coffee station right next to your exhibit table. Includes branded sleeves.

**Horseback Rides**  
Provide a fun experience for a select number of attendees. Includes invites and FPA logistical support.

**Cowboy Boot Station**  
Reward a number of attendees with a pair of authentic Texas cowboy boots fitted right from your exhibit space. Includes the boots and staff for fittings.

**Conference WiFi**  
Create the password and provide to attendees in a conference notebook ad.

**Morning Pick Me Up**  
Provide smoothie shooters from your exhibit table to attendees as they enter the morning General Session.

**Sporting Clay Shoot**  
Provide a fun experience for a select number of attendees. Includes invites and FPA logistical support.

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

June 2–3, 2020
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 event: this includes a half-day educational symposium and full day of meetings on the hill. Partners and attendees dialogue with federal policymakers about our profession while displaying FPA’s strength as the association for all CFP® professionals.

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

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.
One of the most well-attended Next Generation events in the profession is the FPA 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. Over 150 talented young professionals come together each year to celebrate their learning and development in a safe space among like-minded friends. This event provides a format conducive to close-knit experiences that have 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

“FPA NexGen Gathering provides young planners the opportunity to learn from their peers, be exposed to new ideas and best practices, and gain access to the tools needed to jumpstart their careers.” — Martin Seay, Ph.D., CFP®
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. Attendance is highly limited and monitored to ensure all attendees are NexGen financial planners.

**HIGH ROLLER | $15,000** Enjoy the highest level of branding and access to attendees. High Rollers will host a private off-site reception for attendees, receive space in an exclusive attendee-focused Hospitality Suite located near the breakout rooms complete with games, snacks, and places to sit and chat. High Rollers will be the only logos positioned on the official NexGen Gathering t-shirts, and will receive an FPA email sent to all Gathering attendees. Includes four conference passes.

**BET ON BLACK | $7,500** Underwriting “host” for one of the six main conference breakout rooms which includes branding and naming rights, a brief introduction during the initial homeroom, and the ability to introduce each session occurring in the breakout space. Enjoy a select number of special event, excursion and drink tickets to hand out to attendees throughout the event, listing in the mobile app, and two conference passes.

**DOUBLE DOWN | $3,500** This is the exhibit-only opportunity at this event. Receive a cocktail-style table to place giveaways and materials (though most interactions will occur when mixing with attendees during breaks and meals), listing in the mobile app, and one conference pass.

HOW TO MAXIMIZE THIS EVENT

This conference is unlike any you’ve experienced. This is not a traditional lecture-style event with General Sessions. Instead, attendees experience a community-style gathering, complete with peer-led learning sessions, roundtables, and close-knit 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.

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

June & October 2020
Location TBD
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. Over the course of a week, 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. FPA Residency elevates CFP® Professionals’ skills and addresses the difference between BECOMING and BEING a financial planner.

ABOUT THE RESIDENTS

Approximately 35 Residents per session.
100% of Residents either have, or are in the process of obtaining, their CFP® certification.

GROW YOUR CFP STRENGTH

It’s no secret that holistic financial planning is the way of the future. As your firm brings on new professionals, why not send them through the FPA Residency Program? Unlock special pricing through your partnership with FPA. Contact us to learn more about discounted rates, jumping the waitlist, and more.

WAYS TO PARTNER

Given the intimate nature of the FPA Residency Program, FPA offers only one opportunity to connect with Residents.

SUSTAINING PARTNER | $15,000  Enjoy high level branding and access to Residents during the second-to-last day and that evening’s social outing. Your firm will underwrite the private off-site reception for Residents and Mentors (think bowling and beers), and receive an opportunity to meet and greet each Resident. Your firm will also be recognized on Residency marketing as having reduced the price of the FPA Residency program for the current session’s Residents, and will receive one post-event email message (sent by FPA) to all Residents.

“...It’s a great program and a tremendous opportunity to develop the interpersonal skills that you’re not getting in your technical training.”
— Ken P., CFP®, FPA Residency resident

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.
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
• Present Educational Sessions
• Underwrite Experiences and Amenities

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

<table>
<thead>
<tr>
<th>Exhibit Booth</th>
<th>Early Bird Rate*</th>
<th>Standard Rate</th>
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<tbody>
<tr>
<td>10x10 Booth</td>
<td>$7,500</td>
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<tr>
<td>10x20 Booth</td>
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</tbody>
</table>

*Expires November 1, 2019. However, Classic Partners (or higher) always receive Early Bird Rates.

**EXHIBIT BOOTHS** include 2 conference passes, listing in conference marketing, piped and draped space, carpet, and access to conference Wifi. Booth purchase does not include table, chairs, electrical, or hard-line internet.

**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. There are two furnishing packages noted below, as well as branding upgrade options:

*Registration by May 1, 2020 includes a 10-minute presentation on the LED wall.*

**FINTECH SHOWCASE PACKAGES**

- **$5,000 - Basic Package**
  - Two bar stools
  - One bar-height table
  - One full conference registration

- **$7,000 - 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

SPONSORSHIPS

Our goal at FPA Annual Conference 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 financial planners. Only the highest levels of sponsorship include a speaking element, and the more cost-effective options include an interactive amenity and branding experience that aims to deliver more quality conversations with attendees than just a traditional exhibit booth.

LEADING EDGE | $38,000 An over-arching sponsorship that includes a 10x20 exhibit space, four (4) full conference registrations, (1) 60-minute speaking session, and selection from one of the following headline sponsorship areas:

- **NexGen Lounge** Receive a 20x30 branded space adjacent to your 10x20 exhibit booth, includes high-impact branding, social amenities within the space, and marketing exposure.

- **FinTech Showcase** Receive booth adjacent to the FinTech Showcase, branding on the LED wall, floor stickers, directional signage, and a podcast follow-up interview after your session.

- **Students** Branding on student programming and student sessions, private event promotion, session introductions, and student contact information.

- **Diversity** Branding on the Diversity & Inclusion Private Reception, branded invitations, RSVP information, and five (5) minutes to address the audience.

PLATINUM | $35,000 Deliver a robust 60-minute program that will illuminate different perspectives and experiences on a topic of your choice (pending FPA educational task force approval). Platinum sessions will receive first right of refusal on topics and session days/times. Platinum sessions 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. Also includes up to four (4) conference registrations and a 10x10 booth.

GOLD | $30,000 Work with FPA to construct a 60-minute program on a topic of your choice (pending FPA educational task force approval). Gold sessions will be placed on the conference agenda once all Platinum sessions have been solidified. Slides and handouts can be provided in the mobile app for all attendees to access. Also includes up to three (3) conference registrations and a 10x10 booth.

+ Add snacks and/or beverages to your speaking session - inquire for options and pricing.

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.
Conference attendees responded positively in 2019 to our select partners who were able to offer an amenity experience from their exhibit booths or in connection with high-impact experiences during the conference. While all partners offering an amenity have already renewed, there are still several low-lift, high-impact amenities available. Contact FPA to see availability.

**SILVER | $17,500**

Includes 10x10 exhibit, three (3) conference passes, inclusion in an FPA Amenity Experiences ad in the conference notebook, and selection of one of the below:

- **Closing Night Party**
  Receive high-level branding and marketing leading up to the event and onsite, branded invitations to all attendees, push notifications, verbal recognition, and more!

- **Coffee Bar**
  Features a 4-hour coffee bar for one (1) day, directly adjacent to your exhibit booth. Includes directional signage and branding/marketing, and all fees.

- **Breakfast Smoothies** (or similar choice)
  Receive one (1) pre-conference email and includes all fees and logistics to serve up to 250 attendees from your exhibit booth.

- **Golf Simulator**
  Adjacent to your 10x10 exhibit booth and includes all fees and logistics. Receive high-level branding on the experience, directional signage and onsite marketing.

- **Massage Station**
  Receive booth adjacent to the Massage Station, as well as onsite marketing, directional signage and all fees and logistics for two (2) days with 4-5 massage therapists.

- **Exhibit Hall Classroom**
  Underwrite and support the educational classroom in the middle of the exhibit hall where mini and full-fledged presentations will occur throughout the conference. Includes branding on the glass walls and over-ear headphones, directional signage, and ability to introduce sessions.

- **NexGen Mini Talks**
  Support the future of the profession and underwrite the selection of 3 TED-talk style presentations from emerging young professionals. High-impact branding on the call for submissions marketing campaign, ability to introduce the session and speak for three (3) minutes, and moderate Q&A.

- **Coaches Corner**
  Introduce a track of practice management sessions at the conference, as well as receive logo/branding on all Coaches Corner marketing and activities. Includes mainstage logo recognition.

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.
Conference attendees responded positively in 2019 to our select partners who were able to offer an amenity experience from their exhibit booths or in connection with high-impact experiences during the conference. While all partners offering an amenity have already renewed, there are still several low-lift, high-impact amenities available. Contact FPA to see availability.

**BRONZE | $12,500** Includes 10x10 exhibit, two (2) conference passes, and selection of one of the below:

- **Charging Stations**
  Portable charging stations branded with your logo. Booth must be placed where an adjacent seating area can be staged. Covers all costs.

- **Tote Bags**
  Ability to bring your own tote bags and hand them out at the front of the exhibit hall, welcoming attendees on Day 1 of the conference.

- **Coffee/Snack Breaks**
  Includes branded napkins/coffee sleeves, signage, and branding on the selected break.

- **Wifi**
  Create your own password, and receive a full page ad in the conference notebook. Big screen recognition and signage at registration.

- **Mobile App**
  Receive branding on the conference mobile app, recognition in marketing to attendees, and

- **Headshots**
  Includes additional space, photographer, signage and branding. Branded email sent to attendees with link to download personal photo.

**CONFERENCE ADD-ONS: (MUST PURCHASE EXHIBIT BOOTH SEPARATELY)**

- **New Planner Breakfast**
  Welcome 200+ new professionals & students to the conference with a morning coffee and donuts bar, and deliver words of wisdom. Opportunity for direct exposure to students. **$15,000**

- **Power Networking Reception**
  Inspire the next generation of planners with a speed-dating style of discussion on key topics. Receive five minutes to kick off the reception, selection of one table topic, and high-level branding. **$5,000**

- **International Reception**
  Kick-off the conference for the international attendees with a private reception: breakfast or happy hour. Access to event limited to sponsor and international planners. **$7,500**

- **Podcast Partner**
  Receive branding on the glass podcast walls in the exhibit hall. Ability to host interviews/be interviewed, and receive 30 second advertisements on all conference podcasts. **$10,000**

+ Inquire about high-impact messaging and branding on FPA’s Conference Blog and ads in the Conference Notebook!

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

As powerful teammates in our mission to elevate the profession, FPA’s Strategic and Cornerstone Partners are invited to attend this conference to learn about FPA’s mission and vision over the next year, and how they can support our nearly 2,000 volunteer leaders.

There are a very limited number of sponsorship opportunities available:

- **Strategic & Cornerstone Partners**
  Attendance included within partnership packages. Additional exposure or custom integrations available and incorporated in overall partnership package. Always available as an add-on towards the end of the year, upon request, and custom priced.

  **Customized within partnership packages**

- **Financial Planning Partner**
  Receive a branded breakout room, which will house several sessions throughout the conference. Introduce all sessions within the space, as well as receive a branded amenity from the following list: Happy Hour, Hospitality Snacks, Wifi, Closing Party. Receive exhibit table, two attendees and attendee list.

  $7,500

- **Chapter Resource Partner**
  Available to companies that support membership association operations such as website, meetings, mobile apps, and other engagement tech that supports individual chapters. Includes marketing and a selection of branded amenity (wifi, notebook, creativity boxes, etc.) List available upon request.

  $3,500

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.
2020 PROGRAMS OVERVIEW

CUSTOM EDUCATIONAL PROGRAMS
Demonstrate excellence in thought leadership by co-creating something remarkable with FPA. Program development requires work on both parties, and final products will be strategically positioned to both FPA and partner audiences. Each program is highly customizable and unique per partner. Program content must appeal to FPA’s core audience and meet select criteria to qualify for co-branding and placement on FPA’s platform.

RESEARCH PROGRAMS
Identify an area of opportunity to study, engage and transform the way financial planning tackles big theories, issues, and questions that will move our profession forward. Work in partnership with FPA to customize a research project, analyze the results, and create and distribute content. The research process is highly customized and will be built with FPA and partner interests in mind. Development cost and timeline, as well as content distribution and life of content, will impact the overall price. See page XX to learn more.

SPONSORSHIPS: $35,000- $50,000+

E-LEARNING PROGRAMS
FPA will aid in development of an online learning 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 customizable and unique per partner. The final product may be a multi-part e-learning series, an interactive classroom, coursework for a certification program, or a variation of live and recorded content. See page XX to learn more.

SPONSORSHIPS: $15,000 - $50,000+

PODCAST PROGRAMS
Partner with FPA to create a special-release (single or series) podcast that capitalizes on your expertise and delivers valuable content to the financial planner community. Podcast Programs can be built into a bigger partnership strategy and lean upon FPA’s wide financial planner base to target the right distribution channels. FPA will work with you to devise a podcast plan that includes timeline, expertise, purpose/goals, and distribution channels. See page XX to learn more.

SPONSORSHIPS: $15,000+

PARTNER MARKETING PROGRAMS
If your product aligns with FPA’s financial planner audience, showcase your expertise and products in partnership with FPA. FPA reserves discretion in channels and messages, as well as which companies and products are promoted to FPA members.

MEMBER DISCOUNT PROGRAM
FPA works with companies that have a world-class product that supports the financial planning process. For a small fee and an exclusive, ongoing discount for FPA members, enjoy heightened member benefits marketing to FPA members. Choose from two levels, and additional benefits for FinTech Partners. See page XX to learn more.

SPONSORSHIPS: $2,500 - $5,000

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

FPA works with partners to identify, build-out, and generate timely research that furthers the financial planning profession, and/or aid financial planners in the practice or business aspects of financial planning. Research typically takes approximately four months from inception to completion, not including the marketing and distribution plan following completed research.

The first step in executing research with FPA is a discovery call to determine the goals and focus of the program. This is followed by a project scope and timeline. The overall research program price is determined by several factors including program scope, time, resources, content creation and distribution.

**RESEARCH PROGRAMS: $35,000 ++**

**Research Programs may include:**
- Field research support and data aggregation
- Summary reports and topline findings
- Press release & media interviews
- Panel discussion/breakout session at an FPA event
- An entire track of content at an FPA event
- Creation of white papers and other related content
- Programs designed to fulfill identified educational gaps
- Custom positioning within the *Journal of Financial Planning*

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**2019 RESEARCH:**

**War on Stress**
Janus Henderson Investors and Investopedia partnered with FPA to explore the issue of stress among financial advisors and investors, its causes and what can be done. Results revealed a significant connection between stress and feelings of financial insecurity.

**2019 Trends in Investing***
FPA and the *Journal of Financial Planning* partnered to conduct annual research on investing trends for 2019 and beyond (*repeated annually).

**Advisory Firms in 2030: The Innovation Imperative**
SEI and FPA unveiled new research at FPA Annual Conference 2019 from “Advisory Firms in 2030: The Innovation Imperative,” a study offering insight into how the profession is - and isn’t - anticipating clients’ changing needs and innovation’s role in adapting to these changes.
E-LEARNING PROGRAMS

Partner with FPA to create an educational program that will be delivered virtually either one-time or as a multi-part series, to FPA members and/or targeted audiences as identified in partnership with FPA and partner. Leverage FPA's dynamic expertise to customize a learning program that positions your firm as a subject-matter-expert and thought leader who is equally dedicated to elevating our profession.

Content created for FPA distribution requires FPA content review and approval. FPA seeks to provide world-class, unbiased content that is free of product pitches or self-serving messages. FPA will work with partners to identify gaps and opportunities for educational offerings that serve an audience of financial planning practitioners from novice to master across the profession.

E-LEARNING PROGRAMS: $15,000 ++

E-Learning Projects include:
- Co-branding on content
- Project management teamt
- Virtual delivery via webinar (or online classroom*)
- Content consultation hours*
- Instructional design hours*
- CFP Continuing Education credits, when applicable
- CFP Continuing Education reporting, when applicable
- Delivered at once or over multiple dates
- Standard (or Enhanced*) distribution
- Free or discounted registration rates*
- Summary performance reports
- Registrant information
- Press release & media exposure*
- FPA local chapter notification and incorporation*
- Incorporated into national FPA events*

*As determined by FPA and Partner, additional rates may apply.

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.
Partner with FPA to create an educational program that will be delivered as a multi-part series to FPA members and/or targeted audiences as identified in partnership with FPA and partner. Leverage FPA’s dynamic expertise to customize a program that positions your firm as a subject-matter-expert and thought leader who is equally dedicated to elevating our profession.

Content created for FPA distribution requires FPA review and approval of both message and partner. FPA seeks to provide world-class, unbiased content that is free of product pitches or self-serving messages. FPA will work with partners to identify gaps and opportunities for educational offerings that serve an audience of financial planning practitioners from novice to master across the profession.

**PODCAST PROGRAMS**: $15,000 ++

**Podcast Programs include:**
- Co-branding on content
- Hosting or contributing to the content
- Project management team
- Content consultation hours*
- Recording and editing of content
- Delivered at once or over multiple dates
- Standard (or Enhanced*) distribution
- Unrestricted access for listeners
- Summary performance reports
- Press release & media exposure*
- FPA local chapter notification and incorporation*
- Incorporated into national FPA events*
- Incorporated into FPA marketing and/or publications*

*As determined by FPA and Partner, additional rates may apply.

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

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Basic Discount Partner</th>
<th>Enhanced Discount Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use of FPA’s Proud Partner logo</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>FPA-hosted splash pages (public &amp; private)</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Inclusion in the FPA Member Benefits Guide</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>1-month rotating banner ad on FPA’s Discount Program web pages</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>1-month skyscraper banner ad hosted in the digital <em>Journal of Financial Planning</em> (to link to rich content)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>1 full page digital ad in the <em>Journal of Financial Planning</em></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>(Placement based upon open inventory at the time of reservation)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-recorded webinars posted on FPA’s web pages</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Live webinars hosted on your platform and promoted by FPA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to submit educational content for consideration</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>on FPA blogs/forums</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1x use of the FPA direct mail list (no email)</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

**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.

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 firms with less than 300 employees to gain access to the resources they need to be successful. With Group Membership, your firm can manage individual FPA memberships through one centralized point.

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.

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.
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 Threshold
- $75,000 = National Spend
- $50,000+ = Regional Spend

Cornerstone Partner Threshold
- $125,000 National Spend
- $75,000+ Regional Spend

2020 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


For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.
2020 ADVERTISING OVERVIEW

Reach our highly engaged audience with traditional and native advertising, content marketing and a variety of underwriting opportunities. Discount pricing offered for packages of three or more.

PUBLICATIONS (PRINT & DIGITAL) 

Reach our highly engaged audience with display and native publishing opportunities in the Journal of Financial Planning and our NexGen digital publication, the Next Generation Planner.

WEBSITE 

CURRENTLY UNAVAILABLE

Increase awareness, promote content and drive more traffic through FPA’s website, OneFPA.org. FPA is releasing a new website in 2020, and additional opportunities will be identified throughout the year. High level partners receive priority placement on main pages.

EMAILS 

PAGE 36

Place your content directly in FPA member’s inboxes. FPA offers a variety of stand-alone, e-newsletter, and other membership emails that present your company as a subject-matter-expert. Native, advertorial, and custom content opportunities exist.

PODCASTS 

PAGE 37

Reach thousands of financial planners every month with a targeted message, read at the beginning of every podcast. (To influence or co-create content with a Podcast Program, see page 24.)

COMMUNITIES 

PAGE 38

Support the growth and development of FPA’s most engaged communities, centered around a variety of shared goals and experiences. Position your firm at the center of educational excellence and foster an environment that encourages sharing and mentorship.

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

**JOURNAL OF FINANCIAL PLANNING**
The Journal of Financial Planning is the #1 valued benefit of FPA membership and its content, with CE-credit eligible articles, insightful interviews, and practice management insights, is among the most respected in the industry. The Journal’s editorial calendar (each month’s themes) drives all content and member engagements across FPA. This intensive approach deeply engages our membership and provides content to FPA members that is dynamic, innovative and directly beneficial to financial planners.

- **62%** felt that ads in the *Journal* either introduce or reinforce their awareness of products/services
- **57%** have either visited an advertiser’s website or contacted an advertiser in some other manner as a result of seeing ads in the *Journal of Financial Planning*
- **50%** stated that if they are interested in buying a product/service, the ads in the *Journal* help them decide whom to contact
- **57%** of *Journal* readers access their subscription in both print and digital formats

**Display Ad Sizes and Rate Card***

<table>
<thead>
<tr>
<th>AD SIZE - COLOR</th>
<th>1X</th>
<th>3X</th>
<th>6X</th>
<th>9X</th>
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</thead>
<tbody>
<tr>
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<td>$5,400</td>
</tr>
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<td>$4,000</td>
<td>$3,800</td>
<td>$3,600</td>
<td>$3,400</td>
</tr>
<tr>
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<td>Spread</td>
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<td>$10,800</td>
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<tr>
<td>Cover 2, Page 1 Spread</td>
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<td>$13,300</td>
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</tr>
<tr>
<td>Cover 3</td>
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<td>$5,900</td>
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<td>Cover 4</td>
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<td>$6,800</td>
<td>$6,700</td>
<td>$6,500</td>
<td>$6,300</td>
</tr>
</tbody>
</table>

For more information on partnering with FPA, please contact [StrategicPartnerships@OneFPA.org](mailto:StrategicPartnerships@OneFPA.org) or call 800.322.4237 Option 5.
An advertorial is an advertisement delivering information about a brand, product or offering in the style of an editorial article. Advertorials provide an opportunity to tell your company’s story and share your perspectives in a way that engages financial planners, while also integrating your message with the top-quality editorial content available through the Journal of Financial Planning.

‘All content must be approved by the Journal editorial staff.

**PRICING:**

Spread - $11,500 | Full Page - $7,500

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

JOURNAL OF FINANCIAL PLANNING - Unique Sponsorships

The Best of the JFP Sponsorship

This special December digital issue highlights the best content from the past year, as selected by our editors. Sponsorship includes a First Spread advertorial, a 1608px x 294px belly band on the cover, and a 650px x 80px banner ad on the JFP App interface. All options can be linked to your specified url.

$7,500

Distribution: 18,544  |  Open Rate: 28.9%  |  Click Rate: 18.6%  |  Forward Rate: 8.7%

JFP App & Digital Edition Sponsorship

As the world becomes more mobile, so does the Journal’s readership. The Journal’s digital edition average monthly circulation is 28,923 and its cumulative App downloads as of 12/31/17 are 14,500. Engage digitally with a 379px x 379px corner cover or 1608px x 294px belly band on the cover of the JFP digital edition, as well as a 650px x 80px banner ad on the JFP App interface. All options can be linked to your specified url.

$1,500/ea. (bundle of 3 @ $1,200/ea.)

Native Content on the Journal’s Homepage

Generate leads with sponsored content that flows seamlessly within the content on the Journal’s home web page. Includes a 30-word description/intro that links to your content that is hosted on your website.

$2,500/ea. (bundle of 3 @ $2,200/ea.)

Monthly JFP Release Sponsorship

FPA’s favorite member benefit gets a lot of eyeballs each month. Catch the attention of our members with a top-of-email logo and sponsored content article that can link to your specified url. Placement is within FPA’s monthly content email, positioned for members to access all relevant content that is in line with the JFP’s editorial theme. Sponsorship includes branding and recognition on FPA’s Journal in the Round webinar, FPA’s most widely-viewed webinar each month. (500+ attendees on average). Receive pre-roll advertisement page, 30 second commercial, and webinar attendee list for 1x email follow-up.

$4,500/ea. (bundle of 3 @ $3,900/ea.)

Distribution: 19,500+  |  Open Rate: 26%  |  Click Thru: 12.5%  |  Forward: 8.3%

For more information on partnering with FPA, please contact StrategicPartnerships@OneFPA.org or call 800.322.4237 Option 5.
## 2020 JFP Editorial Calendar

<table>
<thead>
<tr>
<th>Issue</th>
<th>Editorial Focus</th>
<th>Materials Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td><strong>College Funding</strong></td>
<td>Understanding various financial aid options, including grants, scholarships, work-study, and loans; 529 plans</td>
</tr>
<tr>
<td>February</td>
<td><strong>Fintech</strong></td>
<td>How the latest software, systems, big data, and AI is impacting the planning process and financial planning firms</td>
</tr>
<tr>
<td>March</td>
<td><strong>Client Trust and Communication</strong></td>
<td>Financial counseling and financial therapy theories and practices</td>
</tr>
<tr>
<td>April</td>
<td><strong>Estate Planning</strong></td>
<td>The latest on estate planning according to recent case law and new legislation</td>
</tr>
<tr>
<td>May</td>
<td><strong>Next Generation of Planners and Clients</strong></td>
<td>Career paths in financial planning; business models for successfully serving the next generation of clients</td>
</tr>
<tr>
<td>June</td>
<td><strong>Trends in Investing</strong></td>
<td>Insights from the 2020 Trends in Investing Survey, including cryptoassets, ESG, and alternative investments</td>
</tr>
<tr>
<td>July</td>
<td><strong>Health &amp; Aging Planning</strong></td>
<td>Navigating healthcare planning; working with aging clients (best practices and understanding the planner’s responsibility); unique issues related to “solo agers”</td>
</tr>
<tr>
<td>August</td>
<td><strong>Behavioral Finance</strong></td>
<td>Practical applications of behavioral finance concepts and theories</td>
</tr>
<tr>
<td>September</td>
<td><strong>Regulatory Update/Fiduciary Issues</strong></td>
<td>State-level fiduciary efforts, including possible state preemption of the SEC investment adviser rule package</td>
</tr>
<tr>
<td>October</td>
<td><strong>Tax Planning</strong></td>
<td>End-of-year tax planning strategies; implications of and any new amendments to the TCJA</td>
</tr>
<tr>
<td>November</td>
<td><strong>Diversity/Inclusion</strong></td>
<td>How to recruit and retain professionals of color; understanding changing planner/client demographics</td>
</tr>
<tr>
<td>December</td>
<td><strong>Future of the Profession</strong></td>
<td>Trends driving the future the profession; progressive business models and client servicing systems; exploring the definition of “financial planning”</td>
</tr>
<tr>
<td>December</td>
<td><strong>Best of the Journal 2020</strong></td>
<td>The most influential articles from 2020</td>
</tr>
</tbody>
</table>

*Calendar is subject to change without notice.*

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

FPA Partnership Opportunities  
OneFPA.org/PartnerWithFPA

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FPA Partnership Opportunities

OneFPA.org/PartnerWithFPA

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NEXT GENERATION PLANNER

The Next Generation Planner is a monthly digital-only publication designed for those new to the financial planning profession. Content is generated by an editorial board comprised of financial planners, FPA staff and underwriting partners.

ANNUAL UNDERWRITING PARTNERSHIPS: $15,000

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.

Underwriting Partnerships include:
- Integration with FPA editorial team & ability to submit content
- Recognized on a “Thank You” page in each publication
- Exclusive advertisement space
- Logo recognition in select NGP marketing messages, including monthly distribution email

4,068 Total App Users
4,293 Issues Downloaded
## PUBLICATION SPECIFICATIONS

### Print

<table>
<thead>
<tr>
<th>FULL PAGE</th>
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<th>HALF 2 PAGE SPREAD</th>
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<tbody>
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<td>Bleed size:</td>
<td>8.625” x 11.125”</td>
<td>Live Area: 15.25” x 4.75”</td>
</tr>
<tr>
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<td>2/3 page: 4.5” x 9”</td>
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<td>Live area:</td>
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<td>1/2 page horizontal: 7” x 4.5”</td>
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<table>
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<tr>
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<tbody>
<tr>
<td>Bleed size: 17” x 11.125</td>
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<tr>
<td>Trim size: 16.75” x 10.875”</td>
</tr>
<tr>
<td>Live Area: 16.25” x 9.875”</td>
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<th>2/3 page: 4.5” x 9”</th>
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<tbody>
<tr>
<td>1/2 page horizontal: 7” x 4.5”</td>
</tr>
<tr>
<td>1/2 page island: 4.5” x 7”</td>
</tr>
<tr>
<td>1/3 page square: 4.5” x 4.5”</td>
</tr>
<tr>
<td>1/3 page vertical: 2.125” x 9”</td>
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</tbody>
</table>

### Digital

**STATIC GRAPHICS/IMAGES:**
- JPEG or GIF 72ppi

**ANIMATED ADS**
- GIF format, file sizes not to exceed 1MB
- Point roll tags

**PODCAST**
- 30 second commercial = approximately 5 sentences
- Require 4/month; due at same time
- Hi res, transparent background logo - .ai (vector) or .png file (raster)

**VIDEO**
- (must include all 3 files)
  - MP4 = MPEG 4 files with H264 video codec and AAC audio codec
  - WebM= WebM files with VP8 video codec and Vorbis audio codec
  - Ogg = Ogg files with Theora video codec and Vorbis audio codec
- 30 seconds max
- File sizes not to exceed (1) MG
- Sponsored content video files must be YouTube uploads

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

Sponsored Content Article
FPA members engage with great content and this is your opportunity to reach them with high quality material. FPA provides FPA members with rich, non-promotional content that correlates to each month’s Journal of Financial Planning theme. 175-word intro with 2-word call to action that links to your specified url. Content is subject to FPA review and approval.

$2,500/ea. (bundle of 3 @ $2,200/ea.)
Distribution: 19,000+  |  Open Rate: 26%  |  Click Rate: 5%  |  Forward Rate: 7%

Standalone Email
FPA Partners can purchase a Power of Planning Partner email blast, which is delivered on Fridays to all members opted-into partner communications. Content is subject to FPA review and approval. Reserve quickly to ensure inventory availability.

$4,500/ea. (bundle of 3 @ $3,900/ea.)
Distribution: 12,800+  |  Open Rate: 25%  |  Click Rate: 4%  |  Forward Rate: 6%

Targeted Email Messages
Reach a specific audience within FPA with a message that is exclusive, product-agnostic and relevant. The content is subject to FPA review and approval. Includes logo recognition and content lead-in. Use as a lead generation vehicle. Targeted audiences include: NexGen, Students & Professors, and FPA Chapter Leaders.

$2,500/ea. (bundle of 3 @ $2,200/ea.)

All Member Open Forum Daily Digest Email
Place a 200px x 200px banner ad on the FPA community’s daily all member email. Receives approximately 130,000+ impressions per month.

$2,500/ea. (bundle of 3 @ $2,200/ea.)

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FPA Partnership Opportunities
PODCASTS

Created with the next generation in mind, “You’re A Financial Planner, Now What?” (YAFPNW) features real financial planners, including masters of financial planning theory and practice to novice planners looking for the next step in their career. YAFPNW offers practical advice, personal stories, and thought-provoking discussions that inevitably lead to growth and development of the financial planning profession.

Join Hannah Moore, CFP®, and her team of financial planners, as they tackle everything from career paths to work-life balance, in this brilliant, weekly podcast built by financial planners, for financial planners. Armed with a passion for lifelong learning, YAFPNW empowers the next generation of financial planners to thrive in their chosen career. Reach thousands of next generation financial planners each month by advertising on the podcast.

PODCAST ADVERTISING: $3,500/MO. (MULTIPLE MONTHS @ $3,000/MO.)

Podcast Advertising includes:
- Logo on the first four (4) podcasts of the month
- Your choice of 30-second message (either recorded or read by podcast host)
- Two 30-second advertisements (beginning and end of podcast)
- Logo on marketing of podcast for the month of sponsorship
- Select the month of sponsorship based upon content alignment

This advertising opportunity does not include the ability to influence or shape content for the podcast. It also does not include any guarantee of featuring your product, service, or expertise within the content of the month’s podcasts. FPA will honor the sponsorship relationship to ensure that no competing products, services, or expertise occurs during the month of your sponsorship.
COMMUNITIES

FPA has a variety of thriving, inclusive communities centered around shared goals and purpose. The opportunity to support these communities is heavily-guarded under FPA and community approval. To access these intimate groups, FPA requires a rigorous screening process. Upon approval, qualified partners enjoy exclusive and untethered access to both educate and financially support the community’s activities throughout the year.

Due to the variety of communities, benefits are customized for each partner experience.

**COMMUNITY SPONSORSHIPS: $25,000/YR. (MULTI-YEAR @ $20,000/YR.)**

**Community Sponsorships may include:**
- Logo on the FPA Connect internal community conversation hub
- Ability to share educational resources with community members
- Branding on content or events occurring within the community
- Exposure in social media, press notifications, or FPA marketing messages
- Invitations to private events with community members

This advertising opportunity does not guarantee your influence over conversations within the community. It also does not include the ability to feature your products or services.

In person events provide opportunities to meet community members, host private receptions, and contribute to conversations that elevate the financial planning profession.

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