# 2021 Partnership Guide

Change Tomorrows™

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# About FPA

## You + FPA = The Next Level

For more than 20 years, the Financial Planning Association® (FPA®) has been the principal membership organization for financial planning practitioners, educators and students who are committed to elevating the profession that transforms lives through the power of financial planning. With a focus on the pursuit of mastery in the practice, business and profession of financial planning, FPA helps practitioners advance their knowledge and expertise through every phase of their careers.

Our best-in-class educational programming, courses and trainings, and profession-leading publications enable our members to gain critical knowledge as they work to achieve higher levels of competency in financial planning. For FPA members, knowledge gathering is only one component of the journey to true financial planning expertise, as our network of 86 chapters and state councils across the country, vibrant and compliance-friendly community forums and myriad other ways to connect offer access to the power of idea-sharing, collaboration and growing together. Advocacy efforts at the state and federal levels position our members and association to make an impact on the future of the profession, and pro bono planning and other volunteer opportunities offer members the chance to take their place as financial planning leaders.

The profession of financial planning is built on the critically important work financial planners do every day, helping Americans envision, build and pursue a brighter future. Just as our members change tomorrows for their clients, the Financial Planning Association changes tomorrows for financial planners by helping them become the best they can be.

# Partner with FPA

Companies that support the growth of the financial planning profession, share our values and want to do impactful and relevant work alongside the Financial Planning Association should consider a Strategic Partnership. Strategic Partnerships are year-long relationships built upon mutual goals and alignment that include account management for your firm. There are three levels of Strategic Partnership, each offering exclusive marketing opportunities, high-impact positioning and thought leadership integrations.

### Elements of an FPA Strategic Partnership

- Sponsoring and Speaking at FPA Events
- Online Learning Webinars and Programs
- Research and Surveys
- High-Impact Marketing, Including Emails
- Thought Leadership Integrations
- Account Management Support

Let’s do something powerful and lasting together—connect with us to start the conversation.

# Strategic Partnerships

FPA works with a limited number of partners who embrace the core policies and strategies that define who we are as an organization, how we seek to shape the financial planning profession and how we serve our members. Partnership is a year-long (or multi-year) relationship that harmonizes thought leadership and content curation to equally benefit our financial planner members and their clients, and your organization. Your alignment with our mission, as well as your goals, budget and priorities, dictate your level of partnership with FPA.

## Feature Partner

Our highest level of partnership, Feature Partners receive first pick of any FPA opportunities each year and have access to an Account Management team that oversees the project management and thought leadership, branding and positioning integrations across FPA membership marketing, publications, events and programs. Partners at this level are the first recipients of bonus exposure and elevated opportunities, as well as a variety of benefits that are otherwise not available to other partners.

**Threshold: $250,000+ annual commitment**

## Cornerstone Partnership

As one of the deepest levels of partnership with FPA, Cornerstone Partnership includes account management support, tailored project and program exploration and delivery, and targeted branding and marketing integrations across FPA membership marketing, publications, events and programs. Cornerstone Partners typically select one key area of focus for the duration of the partnership, but always have the option to expand and grow into a Feature Partner relationship in the following year.

**Threshold: $100,000+ annual commitment**

## Supporting Partnership

FPA Supporting Partners typically fold tactical elements into a collaborative, annual relationship which may include any combination of advertising and branding, content distribution, membership, speaking or exhibiting at conferences, online learning and quarterly account management reviews.

**Threshold: $40,000+ annual commitment**

# Advertising and Positioning

Engage with FPA members through traditional and high-impact advertising and marketing opportunities aligned with FPA’s publications and communications.

# *Journal of Financial Planning*


FPA members receive the digital edition of the *Journal of Financial Planning*, our award-winning, monthly peer-reviewed academic publication, free of charge as part of the cost of membership. The *Journal's* editorial calendar (each month's themes) drives the majority of content and member engagements across FPA, ensuring that all of our educational offerings are directly beneficial to financial planners.

**According to our 2019 Readex Survey, advertisements in the *Journal* can bring a greater awareness of your products/services to FPA members:**

- **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

Average Monthly Circulation: 40,219 | January–June 2020 Page Impressions: 137,478

# *Journal of Financial Planning* Advertisements


## *Journal of Financial Planning*

### Full-page Advertisements

A full-page advertisement, linking to the URL of your choice. The *Journal of Financial Planning* is sent to all FPA members each month and will exist in a page-turner format for 2021.

**$2,500**


## *Journal of Financial Planning*

### Premium Advertisements

Amplify your reach with a full-page advertisement in the *Journal of Financial Planning* monthly edition, as well as a banner advertisement on FPA's ungated website. The 300x250 banner advertisement will be placed within one of four ungated, featured *Journal of Financial Planning* articles each month on the FPA website. Both the full-page advertisement and the 300x250 banner advertisement may direct to the URL of your choice.

**$5,000**


## *Journal of Financial Planning*

### Sponsored Content

Place your sponsored content so that it flows seamlessly within the content on the *Journal's* homepage. Includes a 30-word intro that links to your content hosted on your website. This includes both a link within the digital edition (page-turning platform), as well as in the *Journal of Financial Planning* content displayed on the FPA website. Both links will deliver traffic to your sponsored content, which shall be hosted on your website. This also includes a link to your article within the *FPA Weekly Wrap*, our weekly all-member email newsletter.

**$7,500**


FPA Weekly Wrap Email

## *Journal of Financial Planning*

### Title Sponsorship

The *Journal* remains one of FPA's highest-rated benefits and generates major member interest with thousands of visitors each month. Catch the attention of our members with your name exclusively powering the monthly issue, including:

- Your logo displayed in the all-member email and positioned alongside every *Journal of Financial Planning* article in the *FPA Weekly Wrap* for the entire month
- Sponsorship also includes branding and recognition on that month's FPA *Journal in the Round* webinar, one of FPA's most widely viewed webinars each month
- Receive an advertisement on the webinar landing page, a 30-second commercial and the webinar attendee list for 1x email follow-up

**$20,000**

**FPA Weekly Wrap:** 17,149 recipients | 26.6% open rate | 7.1% click rate

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digital belly band


## The Best of the *Journal of Financial Planning*

### Special Issue

This special-edition issue of the *Journal of Financial Planning* highlights the best content from the past year, as selected by our editors. Powering this issue includes:

- A First Spread Advertisement or Advertorial Sponsored Content
- A digital belly band on the cover
- Positioning alongside additional FPA membership marketing related to this special issue.

All digital advertisements can be linked to your specified URL. The special-edition is released mid-December.

**$10,000**

**FPA Best of the *Journal of Financial Planning* Email:** 18,544 recipients | 27.5% open rate | 12.7% click rate

# 2021 *Journal of Financial Planning* Editorial Calendar

January Issue

## College Funding

Understanding various financial aid options, including grants, scholarships, work-study, and loans; 529 plans; and student loan forgiveness programs

February Issue

## FinTech

How the latest software, systems, big data, and AI is impacting the planning process and financial planning firms

March Issue

## Client Trust and Communication

Financial counseling and financial therapy theories and practices

April Issue

## Estate Planning

The latest on estate planning according to recent case law and new legislation

May Issue

## Next Generation of Planners and Clients

Career paths in financial planning; business models for successfully serving the next generation of clients

June Issue

## Trends in Investing

Insights from the 2021 Trends in Investing Survey, including ESG, volatility hedges and alternative investments

July Issue

## Health and Aging Planning

Navigating healthcare planning; working with aging clients; understanding Medicare options and strategies

August Issue

## Behavioral Finance

Practical applications of behavioral finance concepts and theories

September Issue

## Regulatory Update/Fiduciary Issues

Federal and state level fiduciary efforts, CFP Code of Ethics and Standards of Conduct

October Issue

## Tax Planning

End-of-year tax planning strategies; implications of new tax legislation

November Issue

## Diversity/Inclusion

How to recruit and retain professionals of color; understanding changing planner/client demographics

December Issue

## Future of the Profession

Trends driving the future the profession; progressive business models and client servicing systems; exploring the definition of "financial planning"

The *Journal of Financial Planning* Editorial Calendar is subject to change without notice.

# FPA Next Generation Planner


## FPA Next Generation Planner

The *FPA Next Generation Planner* is a monthly digital-only publication providing content for financial planners new to the profession that is incredibly practical and ridiculously valuable, helping them to develop personally and professionally as they work their way toward their most important career goals.

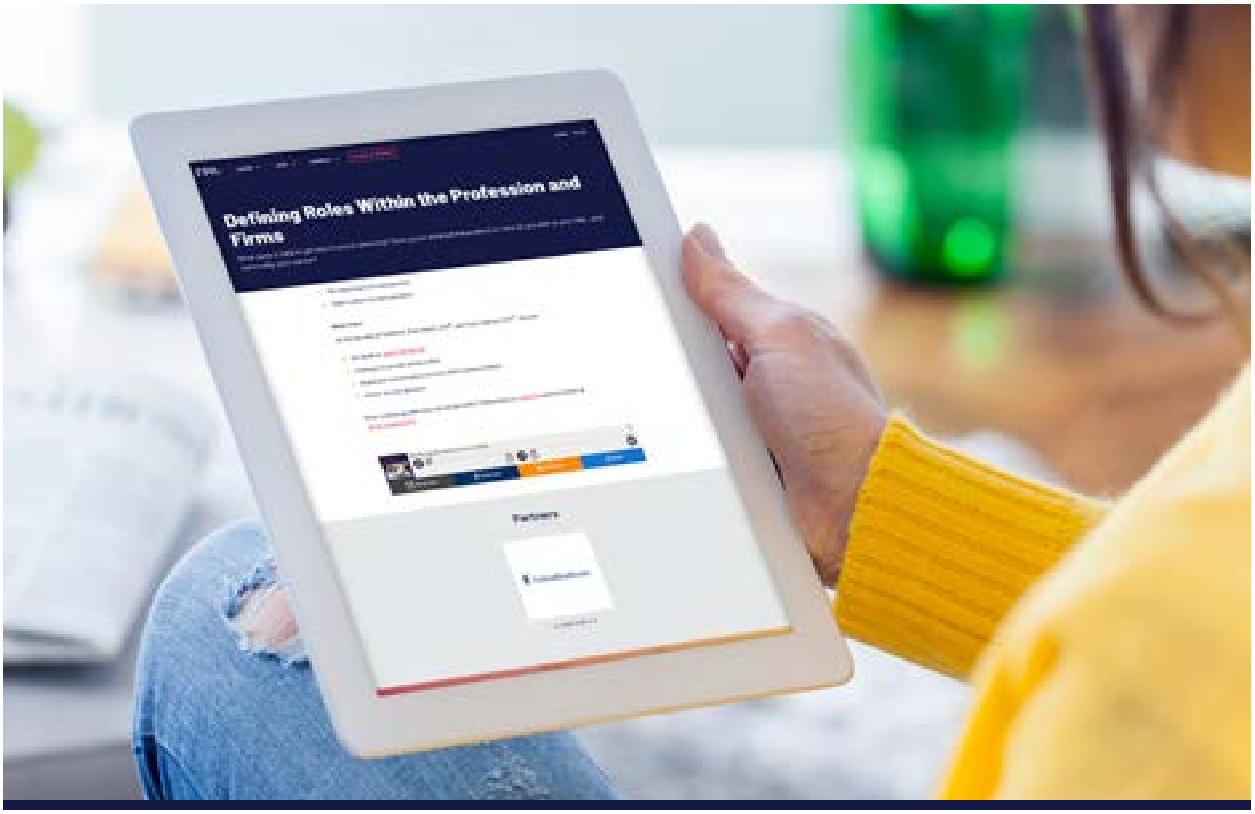
The content follows its own editorial calendar, which is aligned with other FPA NexGen content sources including the *You're a Financial Planner... Now What?*® weekly podcast.

**2020 Stats:*** 4,098 app users | 4,293 issue downloads

*This publication moved from an app to a digital web platform in 2020. Ask us for the most recent subscriber information.

> *"I just discovered the Next Generation Planner, have already caught up through the back issues, and I just wanted to say really excellent job! I've been a member of FPA for a bit and have had a job in the industry for the last 3 years and there is a ton of great information in your issues that is usually never addressed in typical financial planning publications."*
>
> Ryan Kellinger, CFP®

# *You're a Financial Planner...Now What?®* Podcast (*YAFPNW*)




## *You're a Financial Planner...Now What?®* Podcast (*YAFPNW*)

Created with the next generation in mind, the *You're a Financial Planner...Now What?®* (*YAFPNW*) podcast features a variety of financial planner guests, from thought leaders to novice planners looking for the next step in their career. *YAFPNW* offers practical advice, personal stories and thought-provoking discussions that lead to growth and development for individual financial planners and, longer-term, the financial planning profession. Hannah Moore, CFP® and her team of financial planners 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.

**Total Podcast Downloads:** 357,486 (As of Sept. 2020) | **Monthly Unique Downloads:** 8,800
**Average Episode Listener Count:** 1,574 | **Issue Count:** 52 episodes/year

# 2021 *FPA Next Generation Planner* & *You're a Financial Planner...Now What?®* Editorial Calendar

January Issue

## Taking Charge of Your Career

Developing your career. Best practices for moving up the ranks and achieving your goals.

February Issue

## Business Models

Explore different business models in the profession and best tips on how to pursue them.

March Issue

## FinTech

What new planners need to know about fintech.

April Issue

## Compensation Models

A dive into different compensation models in the profession.

May Issue

## Career Paths

Cultivate and manage relationships, including with mentors, colleagues and clients.

June Issue

## Advocacy

What advocacy positions does your professional organization take and how can you get involved?

July Issue

## Personal Branding

Developing your personal brand for success in the financial planning profession.

August Issue

## Giving Back

Giving back with pro bono planning and getting involved in local chapters.

September Issue

## Designations Post CFP® Certification

What designations and certifications should you pursue once you've locked in your CFP® certification?

October Issue

## Professional Development

Developing your career. Best practices for moving up the ranks and working on professional development.

November Issue

## Succession Planning

How to plan for buying into a firm and other elements of succession planning for G2 planners.

December Issue

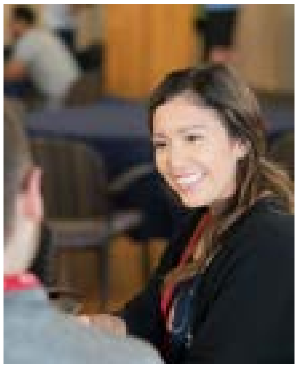
## Future of the Profession

Trends driving the future the profession.

The FPA *Next Generation Planner* and *You're a Financial Planner...Now What?®* Editorial Calendar is subject to change without notice.

# FPA NexGen Marketing

## FPA NexGen Marketing Package



Similar to the *Journal of Financial Planning* Title Sponsorship, partners receive powering positioning and branding on that month's issue, which includes logo placement on the cover of the issue, as well as "powered by" positioning alongside content shared in FPA's Weekly Wrap emails for that month. Sponsorship also includes branding and recognition on FPA's *You're a Financial Planner...Now What?*® podcast, geared towards up-and-coming financial planners. You will also receive a 30-second commercial, branding and positioning on each podcast for the month.

**$12,500**

**FPA Weekly Wrap:** 17,149 recipients | 26.6% open rate | 7.1% click rate

***You're a Financial Planner...Now What?*® Podcast**

Total Podcast Downloads: 357,486 (As of Sept. 2020) | Monthly Unique Downloads: 8,800
Average Episode Listener Count: 1,574 | Issue Count: 52 episodes/year

## FPA Professor News


This quarterly email newsletter provides timely information sent directly to 500+ professors in FPA's academic community, and includes student resources, events and programs. Sponsorship includes a sponsored content article or message with a 150-word introduction and link to a URL of your choice, plus your logo placed at the bottom of the email.

**$2,500**

**FPA Professor News Email:** 540 distribution | 29.1% open rate | 2.85% click rate

# Email Advertising

## Power of Planning Email Blast

FPA Partners can purchase a Power of Planning Email Blast, which is delivered on Fridays to all members who have opted-into partner communications. Content is subject to FPA review and approval. Due to limited inventory, please work with your Account Manager to reserve your dates as soon as possible.

**$7,500**

**Partner Email:** 12,464 recipients | 27.5% open rate | 5.9% click rate

# Online Learning

FPA Strategic Partners are looked upon as thought leaders across the organization and have the unique opportunity to share or co-create dynamic online learning courses and certificate programs in partnership with FPA.

# Online Learning

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. Because FPA seeks to provide world class, unbiased content that is free of product pitches all content created for our audience requires review and approval by FPA.

## Single Course

### $7,500

Deliver up to 50 minutes of content plus 10 minutes of live Q&A. Content may be featured on the FPA Learning Center for up to a year after the live event. Topic, description and learning objectives are required to reserve a course date. Includes:

- FPA Content Review
- CFP Board Continuing Education Submission (when applicable)
- Member Insights Report (after the live event)
- Content on the FPA Learning Center
- Course Registration Link in two FPA Weekly Wrap Email Newsletters
- Registrant emails for a 1x Email Follow-up

## Course Series

### $20,000

Deliver up to three 50-minute interrelated courses over a specified amount of time. Topics, descriptions and learning objectives required to reserve course dates. Content may be featured on the FPA Learning Center for up to a year after live events. Includes:

- FPA Content Review
- CFP Board Continuing Education Submission (when applicable)
- Member Insights Report (after the live event)
- Content on the FPA Learning Center for each course in the Series
- Course Registration Link in two FPA Weekly Wrap Email Newsletters
- Registrant emails for a 1x Email Follow-up


## Partner Content Hub

### $12,000

FPA will create and host a landing page specific to your firm complete with content provided by your firm that supports FPA members, which may include webinars, courses or certificate programs hosted on FPA's platform, recordings from your own platform, white papers, interviews, tools, and other relevant content. Design of this landing page follows FPA's Learning Center format. A minimum of four relevant content pieces are required on this landing page at all times. Content will be reviewed quarterly with your account manager. The landing page will exist until December 31, 2021, at which point you may opt to renew for the following year.

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## Courses & Certificates

### Pricing Varies

Partner with FPA to create an educational course with set learning objectives that will result in mastery of a topic and/or a certificate upon completion.

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## Online Learning Advertisements

Take advantage of FPA's 5,000+ active members on the FPA Learning Center each month, and place a prominent sliding banner advertisement that promotes your educational programs within our platform, or create a splash page within the FPA Learning Center and send members to your content hosted on the FPA Learning Center.

**$3,000/month**

Active FPA Members on the Platform: 5,000+

# FPA Signature Events

Our signature events deliver an opportunity to spotlight your business by connecting with some of the most influential professionals in financial planning.

| | |
|---|---|
| FPA Annual Conference | Sept. 22-24, 2021 |
| FPA Retreat | Postponed* |
| FPA NexGen Gathering | July 2021* |
| FPA Externship Program | Summer & Fall 2021 |
| One FPA Chapter Leaders Conference | November 2021* |

* Due to COVID-19, this event is currently under review

# FPA Annual Conference

Date:
**Sept. 22-24, 2021**

Location:
**Hybrid Event**
**Digital + Columbus, OH**

Sponsorships:
**Varies**

Exhibits:
**$3,500-$7,500**

Attendees:
**(500 in-person)**

Partners:
**150**

The FPA Annual Conference is one of the largest financial planning conferences held each year, attracting thousands of 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.

## How to Maximize This Event

This year's event will be a hybrid experience, offering both in-person and digital sessions and engagements. We encourage you to support both offerings for maximum exposure, as different benefits come from both opportunities. Speaking sessions, activities and amenity experiences provide the richest engagements with attendees, and allows your team to meet planners from all backgrounds and influence key decision makers from some of the largest and most well-known firms in the profession. In the exhibit hall (digital or live) it's always a good idea to provide an incentive for attendees to stop by and meet your team. Showcase your expertise and dedication to the profession in ways that captivate and delight financial planning attendees by providing powerful resources like inspirational and how-to videos, as well as fun polls, trivia, or other conversation starters within your exhibit space.

## About the Attendees

### Registration Type

| | |
|---|---|
| Dually Registered | 47% |
| RIA Only | 40% |
| BD Rep Only | 13% |

### Compensation Structure

| | |
|---|---|
| Fee-Only | 71% |
| Commission-Only | 17% |
| Fees and Commisions | 12% |

### Top Custodians

| | |
|---|---|
| Fidelity | 332 |
| Charles Schwab & Co., Inc. | 314 |
| TD Ameritrade | 278 |
| Pershing | 170 |
| American Enterprise Investment Services Inc. | 53 |

# Ways to Partner

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:

- Exhibit Booth and/or FinTech Exhibit
- Present Educational Sessions
- Underwrite Experiences and Amenities

## Exhibits

### Digital: $3,500 | In-Person: $7,500

Exhibitors receive exhibit space (digital or in-person), three conference registrations, your logo and link on the FPA conference website and the opted-in attendee email list for a 1x follow up. Digital exhibits also include the ability to download visiting attendee's contact information.

## FinTech Showcase

### Digital: $3,500 | In-Person: $5,500

FinTech Showcase exhibitors are just like exhibit booths with an additional perk. Fintech Showcases include all of the above Exhibitor benefits, plus a 10-minute TED-style talk that will be placed alongside the standard conference agenda. FPA will work with partners to pre-record the video, which will then be placed within the conference agenda and marketed to attendees as an alternate educational format, offering a break from the conference's traditional back-to-back hourly sessions. All FinTech content will be presented through the FinTech Showcase, ensuring that attendees will learn about new and current FinTech offerings and best practices, and meet the firms shaping the future of financial planning. The 10-minute TED-style talks will be included in the FinTech Showcase library in an on-demand format for anyone who missed the session. You must be qualified as a FinTech company to purchase space in the FinTech Showcase.

## Speaking Engagement—Guaranteed First Day

### $20,000

Includes a digital exhibit booth and a 50-minute session with 10-minutes of live Q&A. Session content is subject to FPA review and approval. Session is guaranteed to be placed on Day 1 of the conference. Your digital exhibit booth can be upgraded to an in-person exhibit booth for an additional $4,000, and for in-person speakers, one additional registration will be provided.

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## Speaking Engagement

### $15,000

Includes a digital exhibit booth (and all affiliated benefits) and a 50-minute session with 10-minutes of live Q&A. Session content is subject to FPA review and approval. Session will be placed on Day 2 or later. Your digital exhibit booth can be upgraded to an in-person exhibit booth for an additional $4,000, and for in-person speakers, one additional registration will be provided.

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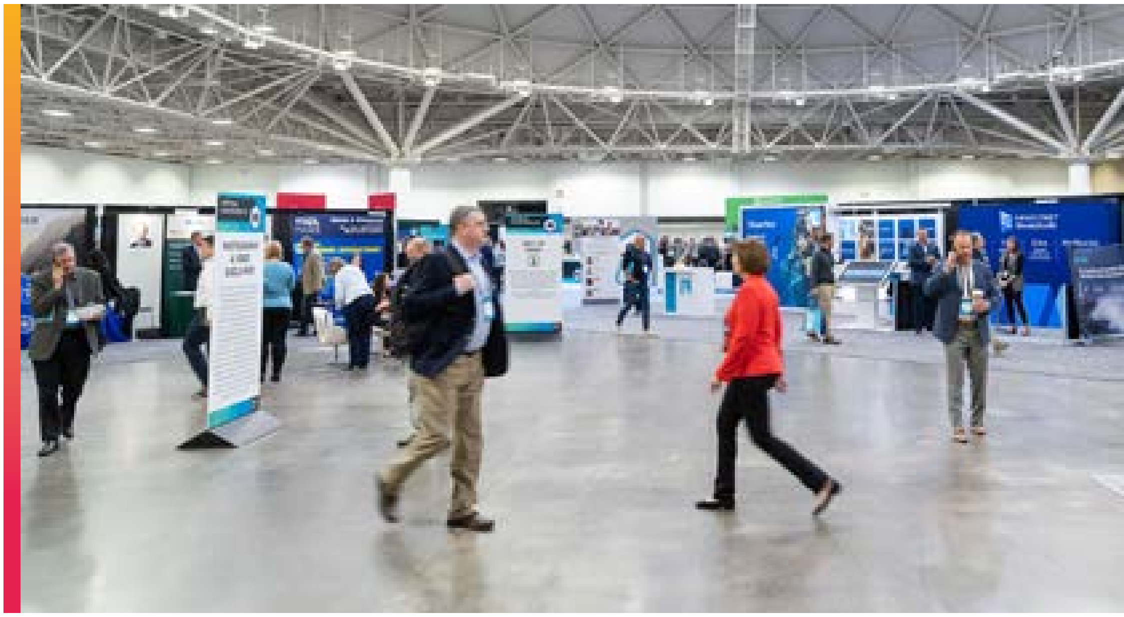
## Experiences

### Price upon request

This year's hybrid event provides both digital and in-person opportunities to create unique and intimate experiences with conference attendees. Either scenario offers fun activities or amenities–work with FPA to determine the right offering that supports your goals and objectives in sponsoring FPA Annual Conference.



# FPA Retreat

Date:
**Postponed***

Location:
**Digital**

Sponsorships:
**$7,500+**

Attendees:
**400**

Partners:
**10**

* Due to COVID-19, this event is currently under review

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. Each year, the top minds in the industry convene to share ideas, examine key issues and pave the way forward for the profession. FPA Retreat harnesses the kinship and power of the financial planning community in a beautiful, intimate setting.

## About the Attendees

The nearly 400 attendees have well-established practices of $250M AUM or higher (on average) and are primarily fee-only or fee-based planners.

## How to Maximize This Event

FPA Retreat is not your traditional lecture-style event. Your contributions are important to ensuring a safe environment free of product-pitches and geared towards the ultra-savvy financial planner who is looking for "what's next?" Partners are encouraged to offer giveaways from their exhibit booths, connect with attendees in networking spaces and co-exist with attendees in sessions. Connect, learn and lead through the conversations that stem from FPA Retreat sessions and interactions. Your wisdom, leadership and support guides attendees to explore new ways of serving clients and growing modern planning practices. Your interactions are important as attendee feedback helps elevate which partners they would like to see in following years.

# Ways to Partner

Affiliate your brand with our intimate event and enjoy exclusive access to FPA's elite members and respected leaders within our profession. We offer limited partnership opportunities and they tend to sell out quickly. You must have a Strategic Partnership with FPA to access partnership and speaking opportunities at Retreat.

## Speaking Engagement

### $7,500

Receive a 50-minute concurrent breakout session, thoughtfully aligned with your firm's expertise and FPA partnership goals. All content is subject to FPA review and approval. Includes three conference registrations, opted-in attendee email list for a 1x follow up, a digital exhibit booth, and (if applicable) your booth incentive marketed to attendees in FPA's Know Before You Go email.

## Retreat Experiences

### $10,000

Select one of the following Retreat experiences that showcases your firm's financial planning focus and provides a fun networking experience to foster deeper relationships, even in a virtual environment.

### Roundtable Discussion

Engage an intimate group of up to 10 FPA Retreat attendees in a one-hour topical conversation that provides both insight for your firm, as well as lively debate and discussion amongst attendees. Moderated by FPA and your firm, includes recording of session and participant list for 1x email follow up.

### Team Activity

Foster a connection with up to 20 FPA Retreat attendees in a joint activity. (Select from FPA's pre-set list of activities.) Invitations to RSVP sent by FPA to attendees prior to the conference. Includes participant list for 1x email follow up.

> *"I've 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

# FPA NexGen Gathering


Date:
**July 2021***

Location:
**TBD**

Sponsorships:
**$4,500+**

Attendees:
**150**

Partners:
**10**

* Due to COVID-19, this event is currently under review

FPA NexGen Gathering is one of the only events designed specifically for those who are new to the financial planning profession. Grown from an intimate, peer-to-peer event in the early 2000's, FPA NexGen Gathering now brings over 150 talented young professionals together each year to celebrate their learning and development in a safe space among likeminded friends. This event provides a format conducive to close-knit experiences that have attendees returning year after year.

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## How to Maximize this Event

This conference is unlike any you've experienced. 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.

## About the Attendees

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

| Role in the Compay | |
|---|---|
| Financial Planner | 42% |
| Owner/Partner | 31% |
| Para-planner/ Jr. Planner | 14% |
| Senior Planner | 11% |
| Resident | 2% |

| Certified Financial Planners™ | |
|---|---|
| CFP® Professional | 67% |
| Not a CFP® Professional | 16% |
| Preparing For/Passed Exam | 11% |

*Based upon Discovery Data & FPA results, July 2020

# 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 event for you. A Strategic Partnership is required for all partnership opportunities, with the exception of exhibit booths being available to former FPA NexGen Gathering sponsors and exhibitors.

## Networking Package

### $10,500*

Enjoy three amazing benefits in one package! This package offers the highest level of branding and exposure to conference registrants and includes both the exclusive opportunity to market a private Virtual Reception for attendees, as well as host a Virtual Interview Booth for set windows throughout the event. Partners will work with FPA to pre-record a video for attendees that walks aspiring financial planners through a career path with your firm, and invites interested registrants to engage with you and/or reserve an interview time to learn more. This video will be provided to registrants in one of FPA's pre-conference emails, and will also be placed within the Virtual Interview Booth. Package also includes marketing exposure leading up to the conference in two FPA pre-conference emails (1 promoting the Virtual Reception, 1 promoting the Virtual Interview Booth), and five conference attendees.

* For the Virtual Reception, FPA will approve and promote your selected conference activity (suggestions provided). Selection of the activity influences the overall expense of the Virtual Reception, therefore the final cost of the selected activity will be billed to the Partner.

## FPA NexGen Gathering Experience

### $7,500

FPA NexGen Gathering attendees love to network and engage with their peers. Through this package, partners will host a digital experience for a self-selected group of attendees. Partners will also receive pre-recorded commercials at the start of no less than two conference breakout sessions, as well as a digital exhibit booth with the ability to capture visitor's information. Partners also receive the FPA NexGen Gathering opted-in attendee list with emails for 1x follow up, and two conference registrations. Partners are encouraged to provide an incentive for attendees to visit their exhibit booth, which FPA will share with attendees in the FPA conference Know Before You Go email. Experience options may include trivia, consultant-led activities, virtual cocktail hours, or others. Contact FPA to discuss available opportunities.

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## Exhibit Booth

### $3,500

Includes a digital exhibit booth with the ability to capture visitor's information, as well as the NexGen Gathering opted-in attendee list with emails for 1x follow up, and two conference registrations. Partners are encouraged to provide an incentive for attendees to visit their exhibit booth, which FPA will share with attendees in the FPA conference Know Before You Go email.

# FPA Externship Program

Dates:
**Pending (2x/year)**

Location:
**Digital**

Sponsorships:
**$20,000+**

Attendees:
**300 per**

Partners:
**5 per event**

FPA Externship Program is perfect for those who cannot attend an in-person internship, want to explore a career change or who want to dive deeper into the art and practice of financial planning.

The goal of this powerful, one-of-a-kind event is to provide students the opportunity to see how financial planning is applied in diverse financial planning firms, and with diverse clientele. With curriculum created and approved by FPA, aspiring and CFP® professionals can learn more about the profession and its practice from wherever they choose to log in. Unlike most financial planning curricula, information will be presented in dynamic, live discussions that allow new planners to see how a real CFP® professional would implement it.

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## About the Attendees

Externship participants are primarily new to the profession, students or career changers.

## How to Maximize this Event

Become a sustaining part of the Externship Program by repeatedly engaging with attendees and helping enhance the program with both financial support and thought leadership and resources that benefit the participants.

# Ways to Partner

The FPA Externship is an incredibly intimate event that does not offer sponsored speaking roles or any type of overt product pitches. Externship partners are companies that can seamlessly integrate with FPA's program, offer attendees valuable resources and wisdom, and ultimately support and elevate the next generation of financial planners.

## Financial Planning Software Partner—Exclusive

### $25,000 per event

This partnership includes a level of exclusivity not available to any other partner of this program. Financial Planning software is a core element of the program, and the participants will be thoroughly trained so that they can complete homework and ultimately comprehensive financial plans upon graduation from the Externship program. Your team will have full, uninhibited access to the program participants, and will provide guidance, resources, technology support, and assist in teaching Externs how to leverage FinTech to best serve their clients.

## Sustaining Partner

### Custom pricing starting at $15,000

Sustaining Partners are integral to the success of the FPA Externship Program. These partners not only financially sustain the Externship, but also provide guidance, resources, and at least one in-depth discussion, lecture, or workshop developed in partnership with FPA. Additionally, partners will be recognized throughout the program in verbal recognition, branding and positioning, and will receive a participant list for a 1x email. Partners may also collaborate with FPA to offer virtual interviews or related job-search resources, practice interviews, and/or resume reviews. Enhanced offerings are possible but require deeper discussion and are priced upon request.

> ***"This externship is exactly what our students and our program needed. Too many well-meaning people without a solid understanding of what financial planning really is have been influencing the direction of our degree for too long. The externship is introducing our students to the reality that financial planning is its own, proud, and exciting field. Finally!"***
>
> David Evans, Director of the Certified Financial Planning Board-Registered Baccalaureate Degree program at Purdue University

# OneFPA Chapter Leaders Conference

Date:
**November 2021***

Location:
**TBD**

Attendees:
**300**

Partnership:
**Upon Request**

* Due to COVID-19, this event is currently under review

The OneFPA Chapter Leaders Conference is an intimate gathering of 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 are critical to the successful management of a membership organization.

As powerful teammates in our mission to elevate the financial planning profession, FPA's Strategic Partners are highlighted at this event, despite the event being an internal FPA leadership event.

Sponsorships are no longer offered at this event, though select Strategic Partners who have engaged with this event in the past may be offered unique opportunities to participate.

Please inquire with your FPA Account Manager to learn more!

# FPA Research

FPA collaborates with our many valued partners to engage in research that is designed to provide financial planners with the business insights they need so they can best determine the steps they need to take for greater business prosperity.

# Research

## State of Financial Planning - Annual FPA Research

Support FPA's inaugural financial planning research project for 2021 and beyond. "State of Financial Planning" will be an annual research project that is directly tied to the trends, strategies, challenges, and needs of the financial planning community and their clients. While incredibly robust, this research will provide a deep look into the core elements of financial planning, and has ample opportunity for partners who support the financial planning community to engage, support and utilize the research results.

### Partners of this opportunity will receive the following benefits:

- Logo aligned with the project on materials, website and reports
- Public Relations opportunities individually and with FPA
- Access to FPA member insights
- Recognition as a research partner on all content stemming from the research

FPA will create the survey and send it to FPA members, encourage partners to share the survey link, compile and analyze the results and publish the results for the broader community and media partners. The research is slated to be released at the FPA Annual Conference each year, which includes a Press Conference. Partners who support this research project will also receive a role in the FPA Annual Conference session that will share insights from the report.

**"State of Financial Planning" Research: $50,000**

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## Other Research Projects

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 the content. The research process is highly customized and will be built with FPA and partner interests in mind. Development cost and timeline, project management and resource demands, as well as content distribution and life of content, will impact the overall price.

This highly custom opportunity is exclusively reserved for FPA's Feature Partners and the research topic/focus must align with FPA's focus on supporting members and their development as financial planners. Examples include: Partner-Identified Research Topics, Focus Groups, Product Testing, Member Interviews, etc.

**Custom Research Project: Pricing varies**

## Surveys

Pose questions to FPA's membership on topics that are highly relevant to the financial planning community. Share your objectives and goals with FPA to determine if your survey meets FPA's filter. FPA's baseline survey opportunity includes project management oversight, a strategic review and editing of partner's questions, FPA uploading the survey, partner logo on the survey, FPA distribution of the survey to FPA members via one email blast, and FPA-created membership messages encouraging survey responses in two FPA Weekly Wrap emails, and one posting on the FPA Connect member forum.

All content is subject to FPA review and approval. Total number of responses cannot be guaranteed, and partners are encouraged to offer an incentive. Partner will receive survey data and is responsible for analyzing results. Due to the very limited inventory, please work with your FPA Account Manager to reserve your dates as soon as possible. You must have a Strategic Partnership with FPA to access survey opportunities.

**Survey: Custom pricing starting at $25,000**

# Diversity & Inclusion

Diversity is an integral part of FPA's culture and identity. Inclusion is the way we treat and perceive all individuals and differences. We strive to create an inclusive culture where diversity is seen as a value for the association to elevate the profession that transforms lives through the power of financial planning.

# Get Involved

## FPA's Diversity & Inclusion Vision Statement

FPA believes in the power of diversity and inclusion in elevating the financial planning profession. FPA is engaged in a multi-year Diversity & Inclusion plan which also aims to cultivate a deeper support community for FPA's financial planners and aspiring financial planners from under-represented groups.

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## Support FPA's Financial Planning D&I Initiative

### $50,000 per year

We are inviting a number of FPA Strategic Partners to join us in diversity and inclusion activities needed to sustain and transform the financial planning profession.

The work of this community of partners, volunteers, consultants, and FPA Staff will result in a number of activities delivered over a number of years, including but not limited to:

- Inclusive Content and Programming
- Thought Leadership and Training
- Community Building
- Elevated Exposure and Awareness

Your investment will not only support this work, but also amplify our alignment across all D&I activities at FPA throughout the term of our relationship. We believe FPA and our Strategic Partners have the rare opportunity to unite and ignite change from within the profession. That alone drives us to carry this initiative forward.

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## During your term of support

Partners of this initiative will be connected to elements created and/or delivered during their term of support. Partners will enjoy elevated exposure across FPA stakeholder audiences which include members, nonmembers, corporate partners, media partners and influencers and the greater financial planning profession. Additionally, top D&I executives and thought-leaders within partnering firms will be invited to sit on FPA's Diversity Advisory Council throughout their term of support. This group will cultivate a safe community for executives and FPA to discuss the high-level strategy for Diversity & Inclusion across the financial planning profession. Executives will meet quarterly and be tapped as needed throughout the term of support, including opportunities to comment on research, address media questions, and deliver messages to stakeholder audiences.

# FPA Membership

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

# Where Financial Planning Practitioners Come Together

## Change Tomorrows™ With Us

When you become a member, you'll have a wealth of opportunities to connect, learn and lead — not only in your journey toward mastery in the practice of financial planning, but in shaping the profession itself.

- Total FPA Members: 20,773 (66% are CFP® Professionals)
- 55% have 20 years of experience or more
- 228 FPA Group Member Firms (Average of 10 Membership Per Group)

Take a look at our latest FPA Membership Dashboard to learn more.

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## What FPA Membership Gives Financial Planning Professionals

### A Place to Belong

FPA gives you access to a receptive community unlike any other where you feel heard, supported and involved. Here's how you can take part:

- Engage With Planners in Your Local Chapter
- Join the Conversation on FPA Connect
- Participate in FPA Knowledge Circles
- Connect Through FPA Social Media
- Build Your Network at FPA Signature Events

### Inspiration

Access timely ideas, unique perspectives and forward-looking points-of view that have value through these publications and platforms:

- *Journal of Financial Planning*
- *FPA Next Generation Planner*
- *"You're a Financial Planner...Now What?" Podcast*
- FPA Social Media Channels

### Growth

FPA provides knowledge, guidance and mentorship to help you continually advance and improve so you can meet the changing needs of your clients with:

- FPA Signature Events
- Online Learning

### Amplification

FPA gives financial planners a unified voice that represents our shared values, vision and collective interests. You can get involved by:

- Lending Your Voice to Legislative Efforts
- Giving Back With Pro Bono Planning
- Sharing Your Expertise

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## Individual Memberships

FPA Strategic Partners receive up to five complimentary individual memberships as part of the cost of the annual relationship. Additional complimentary FPA memberships can be built into your partnership—please let your Account Manager know if you're interested.

For all other companies who are not Strategic Partners of FPA, we encourage participation in FPA's Group Membership program. See below.

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## Group Memberships

FPA Group Membership is an easy and efficient way for financial planning firms 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*
- 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.


# FPA Chapters

Forge powerful and lasting relationships with your local financial planning community. Our 86 active chapters host local meetings and events, and other ways to connect throughout the year.

# Chapter Sponsorship

## Engage Locally

FPA members exist across 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. Partners are encouraged to contact and work with chapters directly.

## 2021 Chapters

- 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

# FPA Strategic Partnerships Team


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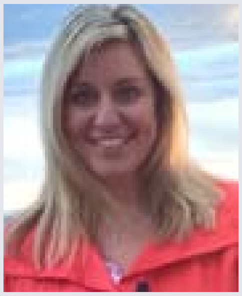


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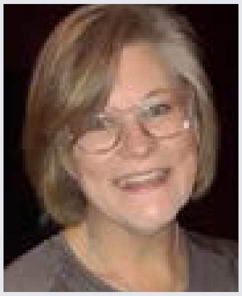


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