



Platinum	Gold	Bronze
\$5,000	\$4,000	\$3,000
<i>Gold and Bronze benefits, plus:</i>	<i>Bronze benefits, plus:</i>	
<b>Symposium</b>		
One 50 minute CFP® CE- approved session (Spring)	Marketing insert in attendee materials (Winter)	Marketing insert in attendee materials (Spring)
"Commercial" played at beginning of one session – 2 Minute video	One copy of attendee list (Winter)	One copy of attendee list (Spring)
Priority booth reservation, premium location	Facilitated introduction to members	Exhibit table & Two reps w/ meals included (Spring)
		Firm logo, rep. contact on screen at all events
<b>In-person Monthly Member Events</b>		
One 50 minute CFP® CE- approved session	Booth next to registration desk at one monthly event	Reserved seating
One jointly held happy hour with another Platinum partner	Attendee list for each event	Brochure/research distribution
	Additional representative (Two total) at each meeting, meals included	One representative at each meeting, meals included
	Attendance at Socials and New Member Orientations	Firm logo, representative contact on screen at all events
	Facilitated introduction to members	
<b>Digital Offerings</b>		
One partner event marketed on FPA NCA calendar	Access to Plum benefits for discounted concert/theater/sports tickets	Recipient of all email announcements to membership
Asset management data survey information	One email blast subject to FCC rules announcing partner event	Firm name, logo, representative contact information on website
	One featured article on website	Copy of membership mailing labels

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

All Partnership Packages are based on the 2022 calendar year. FPA National Capital Area reserves the right to require all membership literature, correspondence and ad submissions to conform to our policies and format regulations, and may require all sponsor speaker presentations be eligible for quality CE credit, as well as speaker outlines, bios and handouts be submitted by the requested due date in order to be eligible for a sponsor speaker presentation time for the monthly meetings, the Symposium or any other speaking event.

\*\*Platinum-level partnerships are limited to TEN partners. Priority will be given to prior year platinum partners, and sponsors actively serving on a committee or Board in the previous year.

### To Discuss Partnership Opportunities Contact:

Catherine Mulcahy- [cmulcahy@alexandriacapital.com](mailto:cmulcahy@alexandriacapital.com)

Jessica Jarosik - [jjarosik@buckinghamgroup.com](mailto:jjarosik@buckinghamgroup.com)

Bo Brinkman - [B.Brinkman@capitalamg.com](mailto:B.Brinkman@capitalamg.com)

Other Questions: Contact Kristin Beane, Executive Director, 508-320-1685, [Kristin@FPANCA.org](mailto:Kristin@FPANCA.org)

## LETTER OF AGREEMENT FOR YEAR 2022

The undersigned hereby applies to become a Partner of the Financial Planning Association of the National Capital Area chapter (FPA NCA) under the terms of the Partnership Program. If Partner is accepted, Partner further agrees to a partnership contract term of January 1<sup>st</sup> through December 31<sup>st</sup>, payable in advance.

The FPA NCA strives to develop quality partnership relationships with sponsors who have a long-term interest in supporting the financial planning industry. Partner understands that FPA NCA has the ultimate right to refuse acceptance to any party without recourse in its pursuit of that goal. All benefits are offered with the understanding that the Partner assumes the responsibility to use benefits within the calendar year.

## RESPONSIBILITIES OF PARTNERS

### Responsibilities of partners will include:

- Prompt payment of annual partnership fee. Refer to Benefits at a Glance sheet for payment amounts.
- Actively participate in the education of our membership on your company's products and services.
- Assume the responsibility to take advantage of the benefits to be used within calendar year.
- Provide company logo, website address, contact name, phone and email for website listings.

### FPA NCA may:

- At its sole discretion, accept, deny, non-renew and/or terminate Partner for cause with no refunds or carry-overs.
- Schedule, reschedule, or cancel, at its discretion, meeting dates or presentations and will not be responsible for any Partner liabilities, financial or otherwise, arising from such actions.
- Change the Partnership fees and/or benefits at renewal with a 30 day notice.

### Partner agrees to the above terms, and hereby applies for a partnership with FPA NCA:

Agreement entered into this \_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_ Level of Partnership-Indicate Preference: Platinum -- Gold --- Bronze

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Printed Name*

\_\_\_\_\_  
*Company Name – as listed on website*

Partner to be listed on the website: \_\_\_\_\_

\_\_\_\_\_  
*Email Address*

(\_\_\_\_) \_\_\_\_\_  
*Phone*

\_\_\_\_\_  
*Address*

\_\_\_\_\_  
*City*

\_\_\_\_\_  
*State*

\_\_\_\_\_  
*Zip*

Toll Free Number \_\_\_\_\_ Website \_\_\_\_\_