

Local Preferred Vendor Sponsorship



*Eligibility Requirements:

\$1,000

- ★ Company/firm must be located within the National Capital Area
- ★ Unlimited sponsorships available

Benefits:

- ★ One email blast to membership per year
- ★ Exhibit table at “Local Vendor Spotlight” happy hour with members
- ★ Company name, logo and contact info on website
- ★ Marketing insert in Spring Symposium materials
- ★ Receive all email announcements to members

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.

To Discuss Partnership Opportunities Contact:

Catherine Mulcahy - cmulcahy@alexandriacapital.com
Jessica Jarosik - jjarosik@buckinghamgroup.com
Bo Brinkman - B.Brinkman@capitalamg.com

Other Questions: Contact Kristin Beane, Executive Director, 508-320-1685, 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 1st through December 31st, 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 of \$1000 for Local Preferred Vendor
- 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____ .

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 _____