

YOUR PARTNERSHIP OPPORTUNITIES



**FINANCIAL
PLANNING
ASSOCIATION**

SOUTH CAROLINA





2022 EVENTS

Symposium

We host an annual one-day symposium offering education, exhibit booths and networking opportunities.

Continuing Education

Throughout the year members obtain CE through in-person and virtual meetings.

Student Success Summit & Career Fair

In partnership with more than a dozen other FPA chapters this event is hosted to bring together aspiring financial planning students.

Networking Events

We are planning a variety of social events for members to network in casual settings.

Other Chapter Events

Our chapter hosts several different events including pro bono opportunities, community outreach and more.

CHAPTER AT-A-GLANCE

Number of Members: 308

CHAPTER DEMOGRAPHICS

73%

cfp professionals

68%

state registered rias

32%

sec registered rias

29%

life insurance license

26%

health insurance license

23%

series 7

20%

variable annuity license

TYPES OF PRACTITIONERS

Accountant
Attorney

Banking Professional

Broker-Stockbroker Registered Rep

Financial Planner

Insurance Professional

Investment Manager

Retirement Planning Professional



2022 CALENDAR OF EVENTS

All events are in person unless otherwise noted. Schedule subject to change without notice

JANUARY

18 | Annual Meeting & CE (Virtual)

FEBRUARY

1 | Webinar

4 | Student Success Summit & Career Fair (Virtual)

15 | Lunch & Learn

MARCH

22 | Lunch & Learn - Charleston

23 | Lunch & Learn - Columbia

24 | Lunch & Learn - Greenville

APRIL

17 | National Volunteer Week Activities

MAY

10 | Annual Ethics and Case Study

JUNE

Regional Member Outings

AUGUST

30 | Lunch & Learn - Charleston

31 | Lunch & Learn - Columbia

SEPTEMBER

1 | Lunch & Learn - Greenville

21 | Sponsor Reception with Members

22 | Annual Symposium

23 | Golf Outing

OCTOBER

4 | Webinar

DECEMBER

6 | Lunch & Learn - Charleston

7 | Lunch & Learn - Columbia

8 | Lunch & Learn - Greenville

We are thrilled about your interest in helping us deliver a first-class member experience. A partnership with you will provide us with a wealth of opportunities including the ability to bring in nationally recognized speakers. What this means for you as a partner of FPASC is that you will enjoy a vast exposure to more financial planning professionals. Our mission is to serve our members by providing educational, networking and mentoring opportunities, representing their professional interests to the government, and promoting the value of financial planning to the public. We strive to offer superior resources and opportunities to our members, and partnerships are critical to the ongoing success of our organization and mission. By partnering with the FPASC, you will have direct access to financial services professionals in South Carolina. Our members include financial planners, brokers, insurance professionals, attorneys, CPAs, trust specialists, banking professionals and more – all dedicated to providing the most valuable products, services and advice to the clients they serve.

Recognition as a chapter partner will allow you to sponsor our organization and reinforces your commitment to the success and growth of our membership, as well as the financial planning profession. In addition to receiving recognition at our chapter meetings and events, you will have the opportunity to make connections, build relationships, engage in conversation, and exchange knowledge with key decision makers in the financial planning industry in the state.

Should you have questions, please contact:

Bobby Cummings

2022 FPA of South Carolina President-Elect

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Ready to sign up?

Visit www.fpasouthcarolina.org



Benefits Package

BENEFIT TRACKER	LEADING	COLLABORATING	IMPACT	COMMUNITY
Symposium				
One General Session Presentation	■	■		
Time to Address Audience	10 min	5 min		
Exhibit Table	■	■	■	■
Symposium Attendee List	■	■	■	
Complimentary Passes for Representatives	2	2	1	1
Complimentary Passes for Guests	4	3	2	1
Meetings				
Annual Pass to all Meetings	■	■	■	■
Recognition During all Regional Meetings	■	■		
One Regional Meeting Presentation	■	■	■	
5-Minutes to Address Audience During 1 Meeting	■	■		
Marketing & Advertising				
Feature Article in One Newsletter	Full	Half	Quarter	
Ad in Chapter Newsletter	Full	Half	Quarter	
Dedicated Personalized Page on Chapter Website	■	■		
Firm Logo and Link to Company Website	■	■	■	■
Firm Recognition in all Chapter Newsletters	■	■	■	
Firm Recognition in all Weekly Announcements	■	■		
Social Media Content Opportunities	6	3	2	1
Other Events				
Chapter-Marketed/Partner-Sponsored Events with no Financial Assistance	■	■	■	
Complimentary Career Fair Booth (Virtual)	■	■	■	
Right of Refusal Exclusive Sponsorship of Member Outing	First	Second		
Annual Pass to all Chapter-Sponsored Networking Events	■	■	■	■
Right of Refusal for Additional Opportunities at Your Own Expense	First	Second	Third	
PARTNER CONTRIBUTION	\$3,500	\$2,500	\$1,000	\$750

Leading Partners are limited to 3 per year.

Right of refusal for special opportunities will be granted in the order partner commitment forms are received.