

Corporate Partnerships

Specific Responsibilities

- Promotes the Financial Planning Association and chapter mission and purpose.
- Attend monthly board meetings, chapter meetings and chapter activities.
- Has primary responsibility for securing platinum and gold partners for FPA Austin so that the organization has enough money to fund its programs and operations.
- Be willing to meet with potential corporate partners and learn about the potential partners' business and motivations (face-to-face meetings or phone calls is the best way to achieve success)
- Attend monthly board meetings, chapter meetings and chapter activities
- Develop a corporate partner committee to assist in delivering benefits and following up on potential leads
- Develop ongoing benefits for sponsorship. Update the Partner Package
- Work closely with Chapter Executive when onboarding new Partner
- Develop and coordinate recognition and appreciation programs for corporate partners and work with board to achieve these goals (ie Partner-Board assignment for introductions to members)
- Work with Partners throughout the year to ensure that they are meeting their goals with the chapter
- Plans the Partner Social with the Chapter Executive
- Maintain communication with other FPA chapters to benchmark corporate sponsorship activities and share ideas.
- Provide ready-to-go content to Chapter Executive for website, invites, surveys and newsletter

Timelines and Details for a successful program

November and December - Update partner Benefit Package for the upcoming year. Need to make a push (start sending emails) to get Sponsors for the following year. Many companies have \$ budget for things like this, and it is better to get those dollars before they are spent elsewhere.

Communicate regularly with Partners. Try to introduce them to luncheon attendees. Send periodic emails to check in with the sponsors.

Set expectations - You must make the sponsor aware that they are going to get out what they put in. If their goal is to get referrals or new business, they need to show up to meetings and take advantage of the other benefits available.

Chapter Executive's Responsibilities as they related to Corporate Partner Director:

- Works with Partners on program benefits and schedules webinars/conversation circles
- Manages website-Partner page and front page
- Sends partner details to Partners
- Sends quarterly Membership list and Chapter Profile to Partners
- Works very closely with Partners and takes care of their needs
- Creates Partner PowerPoint shown before meetings
- Works with Director and President on Partner Social

Updated 2/2022