



**FINANCIAL  
PLANNING  
ASSOCIATION**

**WESTERN  
NEW YORK**

# SPONSORSHIP PROGRAM

Updated October 2021

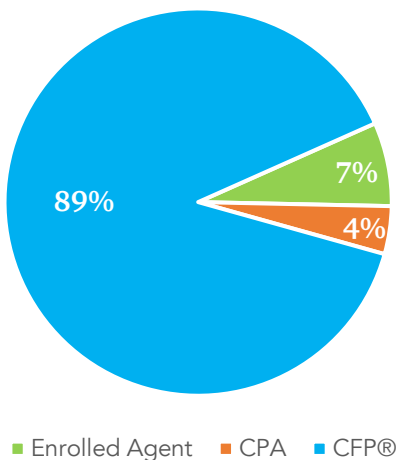
PO Box 368, Amherst, NY 14226 | [www.fpawny.org](http://www.fpawny.org) | (716) 597-3905

The Financial Planning Association® (FPA®) is the largest membership organization for CFP® professionals in the US. Members of this association also include those who support the financial planning process. Our members adhere to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve. The WNY chapter has been in existence since January 1, 2006 and is one of 81 chapters of the FPA®. Our chapter has 130 members managing over \$9 billion for 13,000 clients.

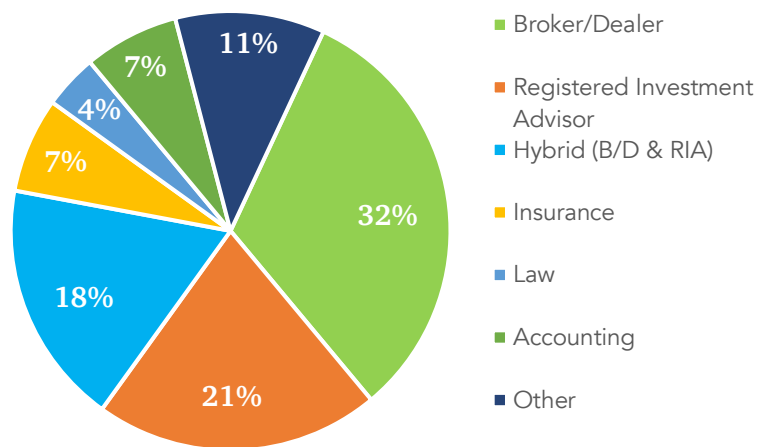
As a Chapter Sponsor you will be supporting one of the industry’s premier associations and receiving exposure to over 100 financial professionals. Sponsorship opportunities include; Gold (\$2,500), Silver (\$2,000), Bronze (\$1,500), and Meeting Sponsor (\$1,000). Please review the next page for details regarding each sponsorship level.

## MEMBERSHIP COMPOSITION

Professional Designations



Member Affiliation



## FPA WNY SPONSORSHIP PROGRAM DETAIL

### GOLD: \$2,500

Benefit	Value
Exclusive Luncheon Meeting Sponsorship* (5-10 minute presentation prior to the program)	\$1,000
20 Luncheon Tickets (May be used any time during the 12 months)	\$500
Exhibit table at symposium (Introduction to all attendees)	\$500
Website logo & link for 12 months	\$200
Participation in our Summer events (Networking Event & Fundraiser/Golf Outing)	\$200
12 Months of email access to members (Limited to once per month)	\$1,000
<b>Total value</b>	<b>\$3,400</b>
<b>Sponsor discount</b>	<b>-\$900</b>
<b>Special pricing</b>	<b>\$2,500</b>

### SILVER: \$2,000

Benefit	Value
Exclusive Luncheon Meeting Sponsorship* (5-10 minute presentation prior to the program)	\$1,000
10 Luncheon Tickets (May be used any time during the 12 months)	\$250
Website logo & link for 12 months	\$200
Participation in our Summer events (Networking Event & Fundraiser/Golf Outing)	\$50
12 Months of email access to members (Limited to once per month)	\$1,000
<b>Total value</b>	<b>\$2,500</b>
<b>Sponsor discount</b>	<b>-\$500</b>
<b>Special pricing</b>	<b>\$2,000</b>

### BRONZE: \$1,500

Benefit	Value
Exclusive Luncheon Meeting Sponsorship* (5-10 minute presentation prior to the program)	\$1,000
4 Luncheon Tickets (May be used any time during the 12 months)	\$100
Website logo & link for 12 months	\$200
6 Months of email access to members (Limited to once per month)	\$500
<b>Total value</b>	<b>\$1,800</b>
<b>Sponsor discount</b>	<b>-\$300</b>
<b>Special pricing</b>	<b>\$1,500</b>

### MEETING SPONSOR: \$1,000

Benefit	Value
Luncheon Meeting	\$1,000
2 Luncheon Tickets	\$50
Attendee List	\$100
1 Month of email access to members	\$80
<b>Total value</b>	<b>\$1,230</b>
<b>Sponsor discount</b>	<b>-\$230</b>
<b>Special pricing</b>	<b>\$1,000</b>

**LUNCH BOOTH: \$500** | Includes two luncheon tickets

## FPA WNY CHAPTER FACT SHEET

- The WNY chapter has been in existence since January 1, 2006 and is one of 81 chapters of the National Financial Planning Association® (FPA®)
- The WNY chapter has over 130 members managing over \$9 billion for 13,000 clients
- Our members hold one or more of the following professional designations:
  - 89% of members hold the CFP® designation
  - 12% of members are CPAs; some also are PFSs (Personal Financial Specialist)
  - 1% of members are attorneys (6 have their JD)
  - 11% of members are ChFCs (Chartered Financial Consultant)

For further understanding of specific designations, visit FINRA's website:  
<http://apps.finra.org/DataDirectory/1/prodesignations.aspx>

- Financial illiteracy is prevalent among our citizens, but most alarmingly among high school students. Our chapter members volunteer with local schools by visiting elementary, junior high, and high school classrooms in the Erie/Niagara region to discuss financial concepts and raise the students' level of financial awareness
- We celebrate National Financial Planning Week (the first week of October) by presenting seminars in our community, writing articles for local papers, and serving as mentors to future financial planners
- Our chapter members meet monthly for lunch from September through June for educational seminars to satisfy our continuing education requirements to maintain our credentials. In addition, we offer a half day symposium in the fall that features nationally known speakers on insurance, investments, taxation, retirement planning and estate planning