2022 Partnership Guide

Your Partner in Planning™

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About FPA

Let's Partner to Support Financial Planners

For more than 20 years, the Financial Planning Association® (FPA®) has been the leading membership organization for CERTIFIED FINANCIAL PLANNER™ professionals and those committed to the financial planning process. FPA partners with our members to help them realize their vision of professional fulfillment through practice support, learning, advocacy, and networking.

Our collaboration with various organizations makes the tools and services growing financial planning practices need more accessible. Our profession-leading publications and educational programs—delivered how and when busy professionals need them—build planner competencies. Our nationwide network of local chapters, vibrant and compliance-friendly community forums, and myriad other ways to connect make impactful networking possible. Advocacy efforts at the state and federal levels, pro bono efforts, and volunteer leadership opportunities position our members as a force leading the profession.

Partner with FPA in this critical work.

Partner with Our Community

The financial planning profession is growing, and financial planners in the FPA community are leading the way. But they need the support of organizations with the tools, products, and services to achieve the next level. Strategic Partnerships with FPA are long-term relationships built upon mutual goals and a desire to support financial planners. FPA offers three tiers of Strategic Partnership, each with exclusive marketing opportunities.

Potential elements of an FPA Strategic Partnership

- Sponsoring and speaking at FPA Events
- Online learning programs
- Research and surveys
- High-impact marketing, including email campaigns
- Thought leadership integrations
- Account management support

Let's partner to support the financial planning community.

Strategic Partnerships Opportunities

FPA offers three Strategic Partnerships opportunities:

Feature Partner

Our highest level of partnership, Feature Partners receive the first pick of any FPA opportunities each year and have access to an Account Management team that oversees the relationship, content integration, branding, and positioning across FPA membership marketing, publications, events, and programs. Partners at this level are the first recipients of bonus exposure, elevated opportunities, and various benefits that are otherwise not available to other partners.

$250,000 minimum annual commitment

Cornerstone Partner

As one of the deepest levels of partnership with FPA, Cornerstone Partners receive account management support, tailored project and program exploration and delivery, and targeted branding and marketing integrations across FPA membership marketing, publications, events, and programs.

Cornerstone Partners typically select one key area of focus for the duration of the partnership. Still, they can expand and grow into a Feature Partner relationship in the following year.

$100,000 minimum annual commitment

Supporting Partner

Supporting Partners typically fold tactical elements into a collaborative, annual relationship, which may include any combination of advertising and branding, content distribution, FPA membership, speaking or exhibiting at conferences, online learning, and quarterly account management reviews.

$50,000 minimum annual commitment

Advertising and Positioning

Engage with FPA members through traditional and high-impact advertising and marketing opportunities aligned with FPA's publications and communications.

Journal of Financial Planning

The *Journal of Financial Planning* is an award-winning monthly publication that provides original, peer-reviewed research and compelling thought leadership for FPA members. The *Journal* is available for all members across multiple platforms and is a comprehensive professional development, education, and advocacy source.

Readers can engage with the *Journal* via online page-turner and web versions. All members have access to the full library of *Journal of Financial Planning* content online.

According to our 2019 Readex Survey, advertisements in the *Journal* can bring a greater awareness of your products/services to FPA members:

- **62%** felt that ads in the *Journal* either introduce or reinforce their awareness of products/services
- **57%** have either visited an advertiser's website or contacted an advertiser in some other manner as a result of seeing ads in the *Journal of Financial Planning*
- **50%** stated that if they are interested in buying a product/service, the ads in the *Journal* help them decide whom to contact

Average Monthly Circulation: 42,184 | **January–June 2021 Page Impressions:** 1,044,738

Journal of Financial Planning Sponsorships and Advertisements

Display Ads

The *Journal* is available digitally to all FPA members each month and will exist in a page-turner format for 2022. Digital ads can link to the URL of your choice.

Ad	Ad Size	1x	3x	6x	12x
Full Page	7.96″ x 10.46″	$4,000	$3,500	$3,000	$2,500
½ Page	6.88″ x 4.75″	$2,250	$2,000	$1,850	$1,500
⅓ Page vertical	2.125″ x 9″	$1,850	$1,500	$1,350	$1,200
Spread	16.36" x 10.46″	$7,500	$7,000	$6,500	$6,000
Cover 2 (page 1 Spread)	(See Spread)	$8,500	$8,000	$7,500	$7,000
Cover 2 (inside front cover)	(See Full page)	$5,000	$4,500	$4,000	$3,500
Digital Skyscraper	120 x 600 pixels	$500	N/A	N/A	N/A
Directory: Small Rectangle	3.35″ x 1.3″	$200	$175	$150	$125
Directory: Small Square	3.35″ x 2.75″	$300	$225	$200	$175
Directory: Large Square	6.87″ x 5.7″	$400	$350	$300	$250
Directory: Vertical Rectangle	3.35″ x 8.67″	$750	$600	$500	$400
Directory: Horizontal Rectangle	6.87″ x 2.75"	$500	$400	$300	$200

Notes to Partners About Advertising:

- All ads need to be High Print Quality PDF.
- **Directory and Digital Bellyband (Static graphics/images)**
  High Print Quality PDF, JPEG, or GIF. (Best practices: JPEGs are best for pictures; GIFs/PNGs for graphics.)
- **JFP Directory | See Directory pricing in above rate card**
  This monthly feature in the print and digital editions of the *Journal* highlights your brand with a logo, description, and URL of your choice.
- **Digital Add-Ons | $1,000-$3,000, depending on format and placement**
  Enhance your digital ad with video and GIF elements in the digital edition. Link to a video from your ad or layer a moving image to attract readers' attention to your message.

Journal of Financial Planning

Digital Sponsored Content

Place your sponsored content so that it flows seamlessly within the content on the *Journal's* homepage. Includes a 30-word intro on the *Journal of Financial Planning* website that links to your content hosted on your website. Digital sponsored content includes a link to your article within the FPA Weekly Wrap, our weekly all-member email newsletter.

$5,000 per item

Journal of Financial Planning

Title Sponsorship

The *Journal* remains one of FPA's highest-rated benefits and generates significant member interest with thousands of digital readers each month. Catch the attention of our members—and many in the greater financial planning community—with your name exclusively powering the monthly issue, including:

- A digital belly band (7.25 wide x 3.5 high) or your logo displayed on the cover of the issue
- 120 x 600 skyscraper banner ad on page zero of the online page-turner
- *Powered by* branding displayed in the all-member email and positioned alongside every *Journal* article in the FPA Weekly Wrap for the entire month
- *Powered by* branding in a dedicated *Journal of Financial Planning* bi-weekly email highlighting content from the current issue

$25,000

Special "Best Of 2022" Issue

This special edition of the *Journal* highlights the best content from the past year, as selected by our editors. The Best Of issue is a popular recruitment tool and has a broader readership than a typical issue of the *Journal of Financial Planning*. Sponsorships are sold on an exclusive basis—your ads are the only ones that readers of this special issue will see.

Powering this issue includes:

- Run-of-book for ad placement (maximum of four)
- A digital belly band across the cover
- Positioning alongside additional FPA membership marketing related to this special issue

Notes to Partners About the Special Issue:

- All digital advertisements can be linked to your specified URL. The special edition is published in mid-December.

$15,000 (December)

Journal of Financial Planning 2022 Editorial Calendar

Month	Topic	Deadline
January	Risk Management	October 29, 2021
February	Health and Caregiving	December 15, 2021
March	Fintech	January 7, 2022
April	Succession Planning	February 4, 2022
May	Financial Literacy and Wellness	March 10, 2022
June	Trends in Investing	April 6, 2022
July	Retirement Planning	May 11, 2022
August	Estate Planning	June 7, 2022
September	Regulatory Update/Fiduciary Issues	July 7, 2022
October	Tax Planning	August 5, 2022
November	Diversity, Equity, and Inclusion	September 6, 2022
December	Charitable Giving	October 7, 2022

Topics and deadlines are subject to change. To submit an article for consideration, email Danielle Andrus, editor, at dandrus@onefpa.org.

Publications for the Next Generation Sponsorships and Advertisements

FPA NexGen Marketing Package (FPA *Next Generation Planner* and *YAFPNW*)

Similar to the *Journal* Title Sponsorship, partners receive powerful positioning and branding on content targeted toward the up-and-coming planner, which includes premium logo placement on the lead page of the section, as well as *Powered by* positioning alongside content shared in FPA's Weekly Wrap emails for that month. Sponsorship also includes branding and recognition on the *You're a Financial Planner...Now What?*® podcast, including a 30-second commercial, branding, and positioning on each episode for the month.

- **FPA *Next Generation Planner:*** The FPA *Next Generation Planner* is a special section within the *Journal* that focuses on new planners and career changers to enhance their skills and help them build the careers they want. The publication complements the *Journal's* larger mission to be a trusted partner for financial planners by helping new planners take their first steps on their path to success.
- ***You're a Financial Planner...Now What?*® Podcast:** Created with the next generation in mind, the *You're a Financial Planner... Now What?*® *(YAFPNW)* podcast features various financial planner guests, from thought leaders to novice planners looking for the next step in their careers. *YAFPNW*, offers practical advice, personal stories, and thought-provoking discussions that lead to growth and development for individual financial planners.

$12,500 per month

FPA Next Generation Planner and *YAFPNW* 2022 Editorial Calendar

Month	Topic	Deadline
January	Business Models	October 29, 2021
February	Marketing and Branding	December 15, 2021
March	Lifestyle Practices	January 7, 2022
April	Succession Planning	February 4, 2022
May	Business Development	March 10, 2022
June	Mentoring	April 6, 2022
July	Advocacy	May 11, 2022
August	Compensation Models	June 7, 2022
September	Client Outreach	July 7, 2022
October	Professional Development	August 5, 2022
November	Diversity, Equity, and Inclusion	September 6, 2022
December	Future of the Profession	October 7, 2022

Topics and deadlines are subject to change. To submit an article for consideration, email Danielle Andrus, editor, at dandrus@onefpa.org.

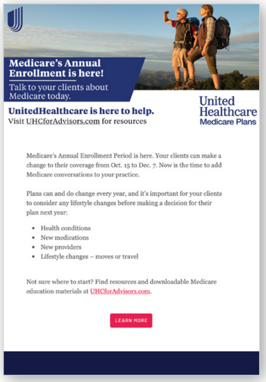
Email Advertising

Email Advertising

Power of Planning Dedicated Email

All FPA partners can purchase a Power of Planning Dedicated Email, delivered on Fridays to all members who have opted into partner communications. Content is subject to FPA review and approval. Due to limited inventory, please work with your Account Manager to reserve your dates as soon as possible.

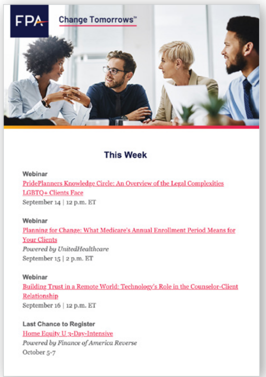
$8,000 per item



Weekly Wrap Sponsored Content

Place your financial planning content within one of FPA's member-favorite properties, the FPA Weekly Wrap—our weekly all-member email newsletter. Featured 1x per month and includes a title and 30-word intro that links to content hosted on your website.

$3,500 per item



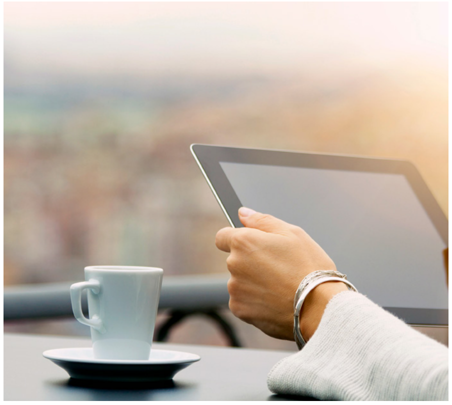
Online Learning

FPA Strategic Partners are looked upon as thought leaders across the organization and have the unique opportunity to share or co-create dynamic online learning courses and certificate programs in partnership with FPA.

Online Learning

Single Course

$8,000 per item



Deliver up to 50 minutes of content plus 10 minutes of live Q&A. Content may be featured on the FPA Learning Center for up to a year after the live event. Topic, description, and learning objectives are required to reserve a course date. Includes:

- CFP Board continuing education submission (when applicable)
- Member Insights Report (after each live event)
- Content on the FPA Learning Center
- Course registration link in FPA Weekly Wrap email newsletters
- Registrant emails for a 1x email follow-up

Course Series

$20,000 per series

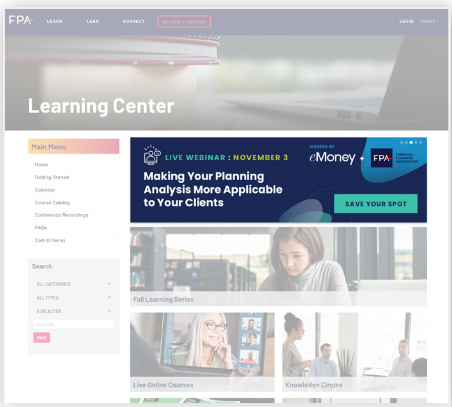
Deliver up to three 50-minute interrelated courses over a specified amount of time. Topics, descriptions, and learning objectives are required to reserve course dates. Content may be featured on the FPA Learning Center for up to a year after live events. Includes:

- CFP Board continuing education submission (when applicable)
- Member Insights Report (after the live event)
- Content on the FPA Learning Center for each course in the Series
- Course registration link in FPA Weekly Wrap email newsletters
- Registrant emails for a 1x email follow-up

Courses & Certificate Programs

Partner with FPA to create an educational course with set learning objectives that will result in mastery of a topic and/or a certificate upon completion.

Custom Pricing



Online Learning Advertisements

Take advantage of FPA's 5,000+ active members on the FPA Learning Center each month. Place a prominent sliding banner advertisement that promotes your educational programs within our platform.

$3,500/month

FPA Virtual Externship 2022

Dates:
Summer 2022

Location:
Virtual

Sponsorships:
$15,000+

Attendees:
300+ per event

Partners:
5 per event

The FPA Virtual Externship is perfect for students who cannot attend an in-person internship, those who want to explore a career change, or those who want to learn more about financial planning. The goal of this powerful, one-of-a-kind event is to allow attendees to see how financial planning is applied in diverse financial planning firms and with a diverse clientele. With a curriculum created and approved by FPA, aspiring and CFP® professionals can learn more about the profession and its practice from wherever they choose. Unlike most financial planning curricula, information is presented in dynamic, live discussions and hands-on work based on financial planning scenarios.

How to Maximize this Event

Become a sustaining part of the FPA Virtual Externship by repeatedly engaging with attendees and helping enhance the program with financial support, thought leadership, and resources that benefit participants.

Ways to Partner

The FPA Virtual Externship is an incredibly intimate event that does not offer sponsored speaking roles or overt product pitches. Externship partners are companies that can seamlessly integrate with FPA's program, offer attendees valuable resources and wisdom, and ultimately support and elevate the next generation of financial planners.

Financial Planning Software Partner—Exclusive

$25,000 per event

This partnership includes a level of exclusivity not available to any other partner of this program. Financial Planning software is a core element of the program. The participants will be thoroughly trained to complete homework and, ultimately, comprehensive financial plans upon completion of the Externship. Your team will have full, uninhibited access to the program participants to provide guidance, resources, technology support, and assist in teaching Externs how to leverage FinTech to serve clients.

Sustaining Partner

Custom pricing starting at $15,000

Sustaining Partners are integral to the success of the FPA Virtual Externship. These partners financially sustain the Externship and provide guidance, resources, and at least one in-depth discussion, lecture, or workshop developed in partnership with FPA. Additionally, partners are recognized throughout the program in verbal recognition, branding and receive a participant list for a 1x email. Partners may also collaborate with FPA to offer virtual interviews or related job-search resources, practice interviews, and/or resume reviews. Enhanced offerings are possible and priced upon request.

> ***"This externship will go down in history as one of the most valuable experiences of my career. The exposure to so many different points of view within the profession and seeing the actual human side of the planning work made me feel like I'm getting my footing in this profession much better than I ever could without an experience like this externship."***
>
> Brandon Tacconelli, 2020 Extern

FPA Signature Events

Our signature events deliver an opportunity to spotlight your business by connecting with some of the most influential professionals in financial planning.

FPA Annual Conference	December 12–14, 2022
FPA Retreat	April 25–28, 2022
FPA NexGen Gathering	August 22–24, 2022

FPA Annual Conference 2022

Date:
December 12–14, 2022

Location:
Seattle, Washington

Exhibits:
$6,000+

Attendees:
1,800

Partners:
150

FPA Annual Conference is one of the largest financial planning conferences held each year, attracting nearly 2,000 CFP® professionals and financial planning thought leaders worldwide. Attendees range from young professionals to expert, lifelong planners eager to share practical strategies, tactics, and knowledge.

How to Maximize This Event

Speaking sessions, activities, and amenity experiences at the conference provide the richest engagements with attendees and allow your team to meet planners and influence critical decision-makers from some of the most well-known firms in the profession. In the exhibit hall, it's always advisable to incentivize attendees to stop by and meet your team. Showcase your expertise and dedication to the profession in ways that captivate and delight financial planning attendees by providing powerful resources like inspirational and how-to videos, as well as fun polls, trivia, or other conversation starters within your exhibit space.

Ways to Partner

Discover all the ways your firm can support the growth and development of financial planners and the profession at the FPA Annual Conference:

- Exhibit Booth and/or FinTech Exhibit
- Present Educational Sessions
- Underwrite Experiences and Amenities

Exhibits

$8,000 per booth

Exhibitors receive a 10x10 exhibit space and basic exhibit package, including carpet, conference WiFi, one six-foot table, two chairs, three conference registrations, company logo and link on the FPA conference website, and the pre-conference attendee list (due to FPA's privacy policy, this list does not include phone or email).

FinTech Showcase

$6,000

FinTech Showcase exhibitors are just like exhibit booths but include a 10-minute TED-style talk placed alongside the conference schedule and marketed to attendees as an alternative educational opportunity. This unique "showcase" ensures attendees learn about new and current FinTech offerings and best practices and meet the firms shaping the future of financial planning. Your firm must qualify as a FinTech company to purchase space in the FinTech Showcase.

Speaking Engagement—Guaranteed First Day

$22,500

Includes an exhibit booth and a 50-minute session with 10-minutes of live Q&A. Session content is subject to FPA review and approval, and the session is guaranteed for Day 1 of the conference. One additional registration is provided.

Speaking Engagement

$17,000

Includes a 50-minute session with 10-minutes of live Q&A. Session content is subject to FPA review and approval, and the session will be placed on Day 2 or later. One additional registration is provided.

Experiences

Price upon request

The conference provides opportunities to create unique and intimate experiences with attendees. Whether fun activities, interactive elements, or amenities—work with FPA to determine the right offering that supports your goals and objectives in sponsoring FPA Annual Conference. Experiences partners have had success with include WiFi, receptions, coffee/snack breaks, custom experiences and more.

FPA Retreat 2022

Date:
April 25–28, 2022

Location:
Lost Pines, TX

Sponsorships:
$9,000+

Attendees:
400

Partners:
10

FPA Retreat is not your traditional lecture-style event. Each year, the top minds in the profession convene to share ideas, examine critical issues, and pave the way forward for the profession. FPA Retreat harnesses the kinship and power of the financial planning community in a beautiful, intimate setting. Among the 400 attendees, most have well-established practices of $250M AUM or higher (on average) and are primarily fee-only or fee and commission planners.

How to Maximize This Event

Your contributions are essential to ensuring an environment free of product pitches and geared towards the ultra-savvy financial planner looking to discover what's next in the profession. Partners are encouraged to offer giveaways from their exhibit tables, connect with attendees in networking spaces, and participate in sessions. Your insight, leadership, and support help attendees explore new ways of serving clients and growing modern planning practices.

Ways to Partner

Affiliate your brand with our intimate event and enjoy exclusive access to FPA's members and respected leaders within our profession. We offer limited partnership opportunities, which tend to sell out early. You must have a Strategic Partnership with FPA to access partnership and speaking opportunities at Retreat.

Speaking Engagement

$9,000

Receive a 50-minute concurrent breakout session, thoughtfully aligned with your firm's expertise and FPA partnership goals. All content is subject to FPA review and approval. Includes three conference registrations, opted-in attendee email list for a 1x follow up, an exhibit space, and (if applicable) your table incentive marketed to attendees in FPA's "Know Before You Go" email.

Retreat Experiences

$12,000

Select one of the following Retreat experiences that showcases your firm's financial planning focus and provides a fun networking experience to foster deeper relationships.

Roundtable Discussion

Engage an intimate group of up to 10 FPA Retreat attendees in a one-hour topical conversation that provides both insight for your firm, as well as lively debate and discussion amongst attendees. Moderated by FPA and your firm, includes recording the session and participant list for 1x email follow-up.

Team Activity

Create a connection with up to 20 FPA Retreat attendees in a joint activity (select from FPA's pre-set list of activities). FPA sends invitations to attendees before the event and provides a participant list for 1x email follow up.

> *"I've attended several FPA Retreats and made lasting connections and friendships with people who care as deeply about our profession as I do. I've found that the thoughtful themes of the gathering provide a rich environment for provocative conversations that invariably lead to new ways of thinking and being."*
>
> Debbie Grose, CFP®, 2020 FPA Retreat Task Force

FPA NexGen Gathering 2022

Date:
August 22-24, 2022

Location:
Las Vegas, Neveda

Sponsorships:
$3,500+

Attendees:
150

Partners:
10

FPA NexGen Gathering is one of the only events explicitly designed for the next generation of financial planners. Grown from an intimate, peer-to-peer event in the early 2000s, FPA NexGen Gathering now brings over 150 talented young professionals together to explore their learning and development among friends. This event provides a format with unique experiences that have attendees returning year after year.

How to Maximize this Event

This conference is unlike any you've attended or exhibited at before. Attendees experience a community-style gathering, complete with peer-led learning sessions, roundtables, and close-knit sessions that cater to an organic, learning environment. For partners, this means you need to blend into your surroundings, get out from behind the table and engage with planners in their comfort zone. With a limited number of partner opportunities each year, our planning committee plays a key role in selecting and assessing the partners that participate.

Ways to Partner

Due to the intimate nature of Gathering, only a handful of partners experience this event firsthand. If your firm is interested in supporting the next generation of planners, this is the event for you. A Strategic Partnership is required for all partnership opportunities, except for exhibit tables available to former FPA NexGen Gathering sponsors and exhibitors.

Networking Package

$10,500

Enjoy three amazing benefits in one package! This package offers the highest level of branding and exposure to Gathering attendees and includes both the exclusive opportunity to market a private reception for attendees, as well as host an Interview Booth for set times throughout the event. Partners will provide a pre-recorded video for attendees that walks aspiring financial planners through a career path with your firm, and invites interested registrants to engage with you and/or reserve an interview time to learn more. This video will be provided to registrants in one of FPA's pre-conference emails. The package also includes marketing exposure leading up to Gathering in two FPA pre-event emails: one promoting the reception and one promoting the interview booth. Note: This package is for the opportunity to host a reception and does not include food and beverage, décor, or other reception add-ons.

FPA NexGen Gathering Experience

$7,500

FPA NexGen Gathering attendees love to network and engage with their peers. Through this package, partners will host an in-person experience for a self-selected group of attendees. Date, time, and location of the experience will be coordinated with the partner and FPA. Experience options may include trivia, consultant-led activities, cocktail hour, or others. Contact FPA to discuss available opportunities.

Partners will also receive an exhibit table. Partners are encouraged to provide an incentive for attendees to visit their exhibit table, which FPA will share with attendees in the event "Know Before You Go" email. Partners also receive the Gathering opted-in attendee list with emails for 1x follow-up, and two conference registrations.

Exhibit Table

$3,500

The exhibit table includes two Gathering registrations. Partners are encouraged to provide an incentive for attendees to visit their exhibit table, which FPA will share with attendees in the event "Know Before You Go" email.

FPA Research

From time to time, FPA collaborates with valued partners to conduct research designed to provide financial planners with the business and financial planning insights they need to thrive.

Research

Custom Research Project

Pricing varies based on the scope

Have you identified an area of opportunity to study, engage, and transform how financial planning tackles significant issues and questions? Partner with FPA to customize a research project, analyze the results, and create and distribute the content. The research process is highly customized and will be built with FPA and partner interests in mind. Development cost and timeline, project management and resource demands, and content distribution and life of content impact the overall price. This highly custom opportunity and the research focus must align with FPA's focus on supporting members and their development as financial planners.

Partners that work with FPA on customized research receive (when appropriate and/or possible):

- Brand alignment on all related materials, website, and reports
- Integration with an upcoming FPA conference
- Virtual presentation/webinar for the FPA member community
- Public Relations opportunities individually and with FPA
- Access to FPA member insights
- Recognition as a research partner on all content stemming from the research

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Surveys

Custom pricing starts at $30,000

Are you interested in taking the pulse of the FPA member community on a topic relevant to your company? There are a limited number of opportunities each year to pose questions to FPA members on highly relevant topics to the profession and your business. Let us know your objectives and goals to see if a survey is possible. Each survey opportunity includes project management, review and development, partner branding, survey distribution via one email blast, promotion in two FPA Weekly Wrap emails, and one posting on the FPA Connect member forum.

All content, including questions, is subject to FPA review and approval, and FPA cannot guarantee the total number of responses. The partner will receive raw survey data and is responsible for analyzing results. Due to limited inventory, please work with your FPA Account Manager to reserve your survey as soon as possible. Only those companies engaged in a Strategic Partnership can access survey opportunities.

Diversity, Equity and Inclusion

FPA is engaged in ongoing Diversity, Equity and Inclusion work, which also aims to cultivate a deeper support community for FPA's financial planners and aspiring financial planners from under-represented groups.

Get Involved

FPA's Diversity, Equity and Inclusion Vision Statement

Diversity is an integral part of our culture and identity. Inclusion is the way we treat and perceive all individuals and differences. We strive to create an inclusive culture where diversity is seen as a value for the Association to elevate the profession that transforms lives through the power of financial planning.

FPA DE&I Initiative Supporting Partnership

$50,000 per year

FPA Strategic Partners are invited to join us in the diversity and inclusion activities needed to sustain and transform the financial planning profession. The work of this community of partners, volunteers, consultants, and FPA Staff will support:

- Diversity, Equity & Inclusion Training for stakeholders at all levels of the organization
- Dedicated support to local leaders to support diversity and inclusion work occurring at chapters
- Support of one of FPA's many diverse Knowledge Circles provides peer-to-peer learning for individuals from diverse backgrounds or those seeking to learn how to support diverse staff or clients. Knowledge Circles include: African-American, Asian-American/Pacific Islander, Latino, Neurodiverse, PridePlanners, Women and Finance
- Inclusive content, programming, and community building at FPA conferences

Your investment will support this work and amplify your alignment across all DE&I activities at FPA throughout the term of our relationship. We believe FPA and our Strategic Partners have the rare opportunity to unite and ignite change within the profession. That alone drives us to carry this initiative forward.

FPA Membership

Our members are CERTIFIED FINANCIAL PLANNER™ professionals and those engaged in the financial planning process. The more our members grow as practitioners, the better they can serve their clients today and meet the needs of their clients tomorrow.

A Valued Partner

As a CERTIFIED FINANCIAL PLANNER™, FPA is your partner in planning by helping you realize your vision of success with practice support, learning, advocacy, and networking.

- FPA supports members with vast savings on the tools they need.
- FPA provides members with a relevant, accessible learning program.
- FPA helps members be advocates for financial planning.
- FPA provides unmatched networking with a vibrant community of planners.

Individual Membership

Complimentary with an annual relationship

FPA Strategic Partners receive up to five complimentary individual national memberships as part of an annual partnership. Additional complimentary FPA national memberships can be added to any annual partnership. Let your Account Manager know if you're interested.

For all companies that are not Strategic Partners of FPA, participation in FPA's Enterprise Membership program is encouraged.

Enterprise Membership Package

$1,500 annual access fee

Let FPA help your team find professional fulfillment through practice support, learning, advocacy, and networking. FPA Enterprise Membership is a quick and effective way for firms to provide their employees the resources they need to be successful financial planners. With an enterprise membership, your firm will be provided with a promotional code to share with your team. Your unique codes unlocks:

- **15%** off individual FPA membership dues
- **15%** off registration for FPA Annual Conference and FPA Retreat
- **15%** off select online learning courses
- **15%** off FPA Job Board postings
- All the benefits of individual FPA membership!

FPA Chapters

Forge powerful and lasting relationships with your local financial planning community. FPA's vibrant network of chapters host local meetings and events, and other ways to connect throughout the year. Ask your FPA Account Manager for an introduction to a chapter you want to engage with.

FPA Chapters

- Austin
- Baton Rouge
- Central California
- Central Florida
- Central New York
- Central Ohio
- Central Oklahoma
- Central Pennsylvania
- Central Virginia
- Charlotte
- Colorado
- Connecticut
- Dallas / Fort Worth
- East Tennessee
- Eastern Iowa
- Georgia
- Greater Indiana
- Greater Kansas City
- Greater Memphis
- Greater New Orleans
- Greater Phoenix
- Greater Rochester New York
- Greater St. Louis
- Gulf States
- Hampton Roads
- Hawaii
- Houston
- Illinois
- Iowa
- Kansas
- Kentuckiana
- Long Island
- Los Angeles
- Maryland
- Metro New York
- Miami
- Michigan
- Mid-Oregon
- Middle Tennessee
- Minnesota
- Mississippi
- Nebraska
- New England
- New Jersey
- North Alabama
- Northeast Florida
- Northeast Ohio
- Northeastern New York
- Northern California
- Orange County
- Oregon & S.W. Washington
- Pittsburgh
- Puget Sound
- Rhode Island
- San Antonio & South Texas
- San Diego
- San Francisco
- San Gabriel Valley
- Silicon Valley
- South Carolina
- South Florida
- Southern Arizona
- Southern Colorado
- Southwest Florida
- Southwestern Ohio
- Spokane
- Tampa Bay
- The East Bay
- The Greater Hudson Valley
- The National Capital Area
- The Philadelphia Tri-State Area
- The Southern Tier of New York
- The Suncoast
- The Triangle
- The West Valleys
- Tulsa
- Utah
- Ventura County
- Western New York
- Wisconsin

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