



FINANCIAL  
PLANNING  
ASSOCIATION

VENTURA  
COUNTY



# 2022 CHAPTER RESOURCE PARTNERSHIP OPPORTUNITIES

## FPA VENTURA CHAPTER

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[WWW.FINANCIALPLANNINGASSOCIATION.ORG/CHAPTER/FPA-VENTURA-COUNTY](http://WWW.FINANCIALPLANNINGASSOCIATION.ORG/CHAPTER/FPA-VENTURA-COUNTY)

The FPA of Ventura County is dedicated to facilitating the success of our professional members through education, business development, networking and advocacy. FPA supports the efforts of individuals who believe in and practice the financial planning process and share our ethical values.



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# FPA of Ventura County

Camarillo, CA

JOIN

A photograph of a beach at sunset. The sky is a mix of orange and blue. In the foreground, there are dark, jagged rocks. In the middle ground, a person is surfing on a wave. In the background, there is a wooden pier and palm trees.

# ABOUT US

The Financial Planning Association is the leadership and advocacy organization that connects those who need, support, and deliver financial planning. FPA's 88 chapters represent close to 20,000 members nationwide. Locally, our 150 members located in the greater Ventura area, represent a community of advisors that continually elevate our profession.



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## **ABOUT OUR CHAPTER**

The chapter holds Quarterly Meetings in February, May, August and November. Thanks to the generosity of our Chapter Resource Partners we are able to bring our members top local and national speakers to provide engaging, educational sessions on a wide range of topics relevant to financial planners and allied professionals.

We have four designated Area Coordinators to give members a way to connect to the chapter and its leadership within their own community. In addition to providing a local link to our chapter, the Area Coordinators also conduct monthly Study Group meetings in their respective areas on a variety of local topics, planning issues, and client case studies.

## **TYPES OF PARTNERSHIPS**

One benefit of having to recreate different member experiences during the pandemic was a newly found creativity and the ability to focus on the goals of each partner to tailor their partnership. We used Zoom for much of 2020 and 2021. As the world slowly recovers post pandemic, we are open to new ideas and partnerships that can be tailored to different experiences.



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# PARTNER LEVELS

**Gold  
\$1200**

- 10-Minute Presentation to members at one Quarterly Education Meeting.
- Education Sponsor on marketing materials for Quarterly Education Mtg.
- Priority consideration for speaking sessions at Quarterly Education Mtgs.
- Partner Slide at all Quarterly Education Meetings.
- Ability to introduce speakers at two Quarterly Education Meetings.
- Large Company Logo and contact information listed prominently on Ventura FPA website.
- Quarterly newsletter spotlight with products and services.

**Silver  
\$950**

- Education Sponsor on marketing materials for Quarterly Education Mtg.
- Partner Slide at all Quarterly Education Meetings.
- Ability to introduce speakers at two Quarterly Education Meetings.
- Large Company Logo and contact information listed prominently on Ventura FPA website.
- Quarterly newsletter spotlight with products and services.

**Bronze  
\$700**

- Partner Slide at all Quarterly Education Meetings.
- Ability to introduce speakers at two Quarterly Education Meetings.
- Large Company Logo and contact information listed prominently on Ventura FPA website.
- Quarterly newsletter spotlight with products and services.

**Cash  
\$500**

- Large Company Logo and contact information listed prominently on Ventura FPA website.
- Quarterly newsletter spotlight with products and services.



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# LETTER OF AGREEMENT

The undersigned party (“Partner”) hereby applies to become a “Partner of the FPA Ventura” for 2022.

FPA Ventura strives to develop quality partnership relationships with sponsors who have a long-term interest in supporting the financial planning community. Partner understands that FPA Ventura has the ultimate right to refuse acceptance of any party without recourse in its pursuit of that goal.

2022 Quarterly Meetings are scheduled for:

February 18, 2022

May 20, 2022

August 26, 2022

October/November TBD

## **Responsibilities of Partners and FPA Ventura**

### **Responsibilities of Partners will include:**

- Submission of signed application and payment of participation fee to assure participation level and opportunity.
- Active participation in the education of our membership consistent with the goals of FPA Ventura.
- Responding in a timely manner to requests for audio/visual needs, mailings, and meeting registrations for allotted number of representatives.

### **Responsibilities of FPA Ventura will include:**

- Continuation of the highest quality educational programs to attract the best, brightest, and most successful planners in Southern California.
- Working with Partners to maximize benefits under guidelines above.

**Partner agrees to the above terms, and hereby applies for a partnership with the FPA:**

**Gold Partner**

**Silver Partner**

**Bronze Partner**

**Cash Sponsor**

**Please return both pages of signed agreement to [infofpavc@gmail.com](mailto:infofpavc@gmail.com).**



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## **LETTER OF AGREEMENT, CONT.**

Authorized Signature of Partner: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Company Name: \_\_\_\_\_

Email Address: \_\_\_\_\_

Address, City, State, ZIP: \_\_\_\_\_

Phone Number Internal/Assistant's Name: \_\_\_\_\_

Internal/Assistant's Email Address: \_\_\_\_\_

Internal/Assistant's Phone Number: \_\_\_\_\_

Signed by (indicates acceptance into program): \_\_\_\_\_

Upon receipt of this signed agreement, we will email you an invoice for payment.