



FINANCIAL
PLANNING
ASSOCIATION

VENTURA
COUNTY



2023 CHAPTER RESOURCE PARTNERSHIP OPPORTUNITIES

FPA VENTURA CHAPTER

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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 coastal scene 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

There are various levels of partnership for each budget. With visibility at our four in person meetings that will happen at Cal Lutheran in 2023, FPA Ventura Partnership is a great way to expose your brand and services to financial planners, CFP's, and other professionals that work with financial services companies.



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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 2023.

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.

2023 Quarterly Meetings are scheduled for:

February 24, 2022

May 19, 2022

August 18, 2022

October 20

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.



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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.