

2023 FPA Dallas/Fort Worth Corporate Partnership Prospectus

Your Partner in Planning™

A photograph of two men in business suits sitting at a table, looking at a document. The man on the right is smiling and looking towards the camera, while the man on the left is looking down at the document. There is a glass of water on the table.

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Get to Know FPA Dallas/Fort Worth

Join FPA Dallas/Fort Worth in elevating the financial planning profession.

Thank you for your interest in being a 2023 FPA Dallas/Fort Worth (DFW) Corporate Partner. As a FPA DFW Partner you can help further educate and develop our industry. FPA DFW can connect you with individuals and organizations that are at the forefront of knowledge and expertise, while helping you raise your organization's profile and awareness within the industry.

The Financial Planning Association currently has 80 chapters which encompass over 20,000 members nationwide. The FPA DFW chapter is currently the largest and one of the most active chapters within the FPA. FPA DFW's reach extends well beyond our 860+ member base, to include an additional over 900 prospective members who are contacted and promoted to regularly on our partners' behalf. FPA of Dallas/Fort Worth is being contacted regarding sponsorships more than ever today as companies look for ways to connect with the financial planning community.

At FPA DFW we are proud to partner with a variety of companies and organizations within the industry that we consider true partners. Together, we are committed to providing financial planners with the tools, resources and experiences they need to thrive and be the best they can be. Companies that support the growth of the financial planning profession, share our values, and want to do impactful work alongside FPA should consider a partnership with the DFW chapter. Partnerships are year-long relationships built upon mutual goals.

The *Benefits at a Glance* page explains the four partnership tiers, benefits, and pricing. Each tier offers exhibit space at our Annual Conference which will take place in person at the Irving Convention Center on February 9, 2023.

The first step in securing a spot for 2023 is completing the online [Corporate Partner Renewal Agreement](#).

If you have questions, please reach out to the 2023 FPA DFW Partnership Director, Joel Berg: partnerships@fpadfw.org or the FPA DFW Executive Director, Melisa Hall: (972) 747-0407 (office), (972) 896-7442 (mobile), execdir@fpadfw.org.

We appreciate your interest in partnering with FPA DFW and hope to work with you in 2023.

2023 Sponsorship Level	Annual Dues
Diamond	\$8,500
Platinum	\$6,500
Gold	\$5,000
Silver	\$3,500



OUR VISION FOR OUR PARTNERS

To develop a long term professional and mutually profitable relationship with our partners and to create an excellent working relationship between our members and partners. Let's do something powerful and lasting together!

AT-A-GLANCE

FPA Dallas/Fort Worth is the largest chapter in the nation with an average of 860 financial professional members representing a broad spectrum of specialties including financial planning, broker dealer services, insurance, mutual funds, banks/trust, law, CPA's, investment management and accounting and tax specialists. As a FPA DFW Partner you have access an ideal target audience.

- ✓ 80% of members are over age 40
- ✓ 72% of members have ten plus years of professional experience
- ✓ 71% of members are CFP®'s
12% are ChFC's
11% are CLUs or CPA's
- ✓ 74% have at least a Bachelor's
23% have a Master's
- ✓ Top financial services provided:
77% Retirement Planning
72% Financial Planning
70% Investment / Asset Management
69% Estate Planning
- ✓ Long term involvement equals lasting relationships

"FPA DFW MEMBERS ARE A HIGHLY TARGETED MARKET FOR YOUR PRODUCT OR SERVICE."

Each sponsorship level offers you an excellent opportunity to be a valued partner of our organization and to reap the rewards of establishing a strong relationship with the premier financial planning organization in the Dallas/Fort Worth metroplex.



20,000+
Members Nationwide



80+
Chapters in the U.S.

Where Financial Planning Practitioners Come Together.

Our members are dedicated to elevating the financial planning profession. The more we grow as practitioners and planners, the better we serve our clients today and meet the needs of our clients tomorrow.

It is more important than ever in today's business environment to stay connected. FPA DFW is your gateway and connection to a chapter comprised over 850 leaders in the Dallas/Fort Worth metroplex, and beyond. FPA DFW's reach extends well beyond our 850-member base, to include an additional 900+ prospective members.

The Value of Partnering with FPA of Dallas/Fort Worth

PERSONAL CONNECTIONS

FPA DFW continually develops exciting new avenues to keep our partners connected with our members, both in-person and virtually, on a regular monthly basis. Increase your reach to new clients, customers and businesses, while re-enforcing current relationships with customers.

RECOGNITION

Visibility as an FPA Dallas/Fort Worth partner throughout the year at all chapter events, all newsletters, and on our website.

PUT YOUR BUSINESS FRONT AND CENTER

You are encouraged to attend all FPA DFW events where we will proudly introduce you to our membership. The financial professionals you'll meet through the FPA can help you build long-term business relationships. Members are continually looking for information on new products and services to meet their clients' needs.

GAIN MORE EXPOSURE

You can meet and share your message with a target market at all chapter events. This is an excellent time to collect business cards for follow-up marketing and potential future business.

EXHIBIT

Exhibit space at the annual FPA DFW Conference (February 9, 2023) with anticipated attendance of 250-300 participants. This gives you a premium opportunity to generate strong leads with leaders and decisions makers.

FPA DFW 2023 ANNUAL BENEFITS AT A GLANCE

	Value	Diamond (Limit 1) \$8,500	Platinum (Limit 8) \$6,500	Gold \$5,000	Silver \$3,500
FPA DFW Annual Conference Benefits					
Exhibit Table at the FPA DFW Conference + attendee list	\$2,000	2 Attendees	2 Attendees	1 Attendee	1 Attendee
Promotion of your company on all FPA DFW Conference marketing	\$750	✓	✓	✓	✓
Presenting keynote speaker at the 2023 FPA DFW Conference	\$2,000	✓			
10 Minute sponsor spotlight at 2023 FPA DFW Conference	\$1,500	* ✓			
2023 Annual Benefits					
Speaking engagement at 3rd Annual FPA DFW Virtual CE Day	\$950	✓	✓		
Presenting speaker at a chapter meeting <u>or</u> conference breakout session. <i>Speaking date priority contingent on receipt of contract & payment</i>	\$1,000		✓		
10 Minute Sponsor Spotlight – Opportunity to Pitch Your Services <i>Platinum: Chapter Meeting</i> <i>Gold: DFW Board of Directors Meeting</i>	\$750	*	✓	✓	
Nomination for Annual FPA DFW Corporate Partner of the Year Award	\$1,500	✓	✓	✓	
Promotion of your events and webinars on the FPA DFW website	\$500	✓	✓	✓	
Newsletter Advertising (published bi-monthly)	\$350 EA	4	3	2	1
FPA DFW administered blast e-mail	\$500 EA	4	4	4	2
Logo displayed in opening slide show at all chapter meetings	\$400	✓	✓	✓	✓
Quarterly membership list & demographic report	\$2000	✓	✓	✓	✓
Annual pass to all FPA DFW chapter meetings	\$55 EA	2 per event	2 per event	1 per event	1 per event
Logo & contact information on FPA DFW website + NEW! home page rotating banner starting in 2023	\$600	✓	✓	✓	✓
FPA DFW Sponsor Appreciation Event Networking opportunity with the FPA DFW Board & Leadership Alumni	★ Priceless	✓	✓	✓	✓
Regular recognition as Corporate Partner	★ Priceless	✓	✓	✓	✓

Special notes: FPA Dallas/Fort Worth may have special opportunities throughout the year for sponsorships that would provide you with additional exposure. As those become available, we will reach out to you by email - with absolutely no obligation on your part. We are very appreciative of all that you do for us.

FPA Dallas/Fort Worth Annual Conference

The FPA Dallas/Fort Worth Conference will take place on February 9, 2023. This annual event is for partners that seek to connect with experienced planners who typically handle high-net worth clients. The FPA Dallas/Fort Worth Conference exhibition benefits are included for every sponsorship level.

SPONSORSHIP BENEFITS AT A GLANCE

- ✓ Complimentary registrations
- ✓ Exhibit table for entire event
- ✓ Linked logo on FPA DFW website
- ✓ Invitation to 2 conference receptions
- ✓ Mention during chapter update
- ✓ Access to attendee list
- ✓ Access to all attendees

2023 Benefits	Diamond	Platinum	Gold	Silver
Draped exhibit table – placement based on sponsorship level	✓	✓	✓	✓
Conference attendee list	✓	✓	✓	✓
*Speaking engagement	✓	✓		
10 minute sponsor spotlight	✓			
Logo recognition on event website, signage, marketing materials, advertisements and programs	✓	✓	✓	✓
Registrations (additional discounted passes may be purchased)	3	2	1	1
Logo recognition on FPA Dallas/Fort Worth website	✓	✓	✓	✓
Sponsor recognition throughout the conference (program, signage, conference blast emails, and more)	✓	✓	✓	✓
Conference CE credits, swag, program and literature	✓	✓	✓	✓

For more information on the FPA Dallas/Fort Worth Conference, please contact our office at:

execdir@fpadfw.org

(972) 747-0407

***Speaking Engagement** *Speaking date priority contingent on receipt of contract & payment*

► **Diamond:** Guaranteed keynote speaker at the conference. Topics must be reviewed and approved by the FPA DFW Special Events Chair.

► **Platinum:** Guaranteed speaking spot at a conference breakout session **OR** a chapter meeting. Breakout sessions at the conference are limited and based on availability. Speakers and topics must be reviewed and approved and are selected at the discretion of the FPA DFW Special Events Director and/or FPA DFW Education Director.

2023 Events

FPA Dallas/Fort Worth events provide exclusive access to financial advisors in the greater Dallas/Fort Worth area. Our events are ideal settings for you to get to know our members, other partners, and allied professional guests. We also host many small group events, drawing on our members' combined experience, which are outstanding opportunities to meet and engage our members in more personal setting.

- FPA DFW Conference – February 9, 2023
- 6-7 FPA DFW chapter meetings
- FPA DFW Ballpark event (Opening Day)
- FPA DFW Ballpark event – summer 2023
- NexGen events
- 20th Annual FPA DFW Career Day
- Socials, networking events & happy hours
- DFW Honors Awards Banquet
- Career Development events
- DFW Sponsor Appreciation event
- Pro Bono opportunities
- FPA DFW Media Training



Contact Us



Joel Berg, CFP®
2023 Partnerships Director



Melisa Hall
FPA DFW Executive Director

If you would like to discuss partnership opportunities in greater detail, please contact Joel Berg, FPA DFW Partnerships Director @ partnerships@fpadfw.org.

If you would like to discuss any other questions regarding partnership benefits or general questions about our chapter, please contact Melisa Hall, FPA DFW Executive Director; 972-747-0407 execdir@fpadfw.org

Corporate Partnerships are based on the 2023 calendar year. FPA DFW reserves the right to require all membership literature, correspondence and ad submissions to conform to our policies and format regulations and may require all sponsor speaker presentations be eligible for quality CE credit, as well as speaker outlines, bios and handouts be submitted by the requested due date in order to be eligible for a sponsor speaker presentation time for the chapter meetings, the annual FPA DFW Conference or other speaking events.

We are very appreciative of all you do for us!



FPA of Dallas/Fort Worth

P.O. Box 2267

Frisco, Texas 75034

☎ (972) 747-0407

✉ execdir@fpadfw.org

🌐 www.fpadfw.org

Your Partner in Planning™



2023 Corporate Partner Agreement

To secure your partnership online for 2023

[CLICK HERE](#)

You will be redirected to *Microsoft Forms*

2023 Sponsorship Level	Annual Dues
Diamond	\$8,500
Platinum	\$6,500
Gold	\$5,000
Silver	\$3,500

2023 FPA Dallas/Fort Worth Corporate Partnership Agreement

Complete and submit online. If we do not have a current logo on file for you please send it in a high resolution format (JPG, GIF or PNG high resolution) to execdir@fpadfw.org.

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* Required

[CLICK HERE](#)

1. Date *

2. Company Name *

3. Your Name *