



FINANCIAL  
PLANNING  
ASSOCIATION  

---

ORANGE COUNTY

# 2024 Partner Opportunities

Financial Planning Association of  
Orange County

---

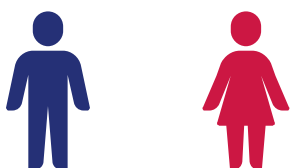


# About FPA of Orange County

The Financial Planning Association® (FPA®) is the leadership and advocacy organization that connects those who need, support and deliver financial planning. FPA's 88 U.S. chapters represent over 19,000 members nationwide. With close to 500 members in the local Orange County market alone, FPA is the definitive community of advisors that fosters the value of financial planning and advances the financial planning profession in our area. Here are the demographics for the current membership of our Orange County chapter

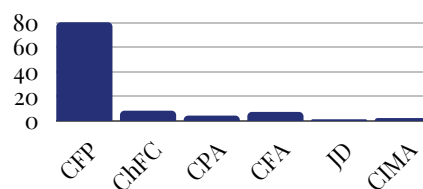
## Demographics

Male 73%      Women 27%



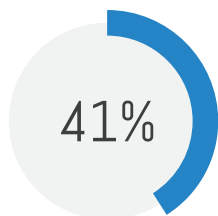
## Designations

% of Chapter Members



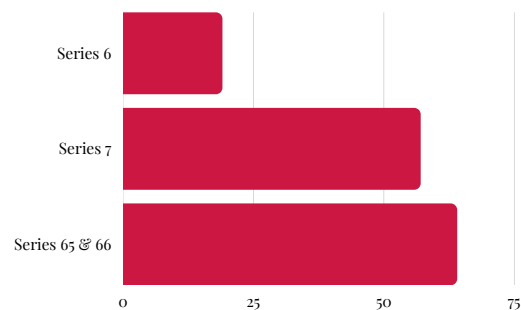
## Independent RIA

41% of Chapter Members



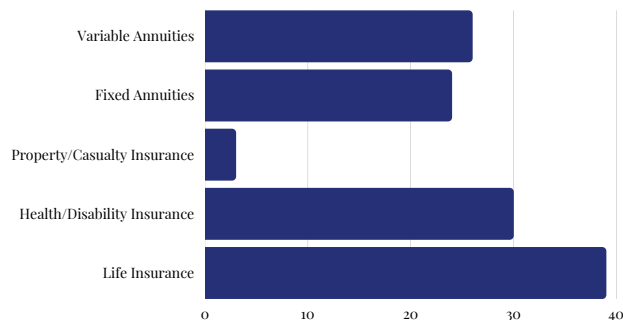
## Security Licenses

% of Members



## Insurance Licenses

60% of Chapter Members





# Survey of Broker Dealers Represented Within FPA of Orange County

---

Alliance Global Partners  
Ameriprise Financial Services Inc  
Cambridge Investment Research  
Centaurus Financial Inc  
Cetera Advisor Networks LLC  
Cetera Financial Specialists  
Chalice Capital Partners LLC  
Client One Securities LLC  
Commonwealth Financial Network  
Compak Securities Inc  
Crown Capital Securities LP  
Dunham & Associates Investment Counsel  
Edward Jones  
Financial Mgmt Network Capital Corp  
First Allied Securities Inc  
FMN Capital Corporation  
Fortune Financial Services Inc  
FSC Securities Corp  
Geneos Wealth Management Inc  
Girard Securities Inc  
GWN Securities Inc  
HD Vest Investment Services  
HSBC Securities (USA)  
Independent Financial Group LLC  
Kestra Investment Services LLC  
Kovack Securities Inc  
Lincoln Financial Advisors Corp  
Lincoln Financial Securities Corp  
LPL Financial LLC  
Merrill Lynch Pierce Fenner & Smith  
MML Investors Services LLC  
Money Concepts  
Morgan Stanley

Mutual Securities  
National Planning Corp  
Northwestern Mutual Investment Serv  
NPB Financial Group  
NYLIFE Securities  
OneAmerica Securities Inc  
Osaic Wealth Inc.  
Pacific Select Distributors LLC  
Park Avenue Securities LLC  
Planmember Securities Corp  
Raymond James Financial Services  
Royal Alliance Associates Inc  
Saturna Brokerage Services Inc  
Securian Financial Services Inc  
Securities America Inc  
Shareholders Service Group  
Sigma Financial Corp  
Signator Investors Inc  
Stifel Nicolaus & Co Inc  
Syndicated Capital  
TCFG Wealth Management LLC  
The Strategic Financial Alliance Inc  
Thrivent Investment Management Inc  
TIAA-CREF Advice and Planning  
United Planners Financial Services  
Waddell & Reed Financial Advisors  
Wells Fargo Advisors LLC  
Woodbury Financial Services Inc  
Other

<b>Total of Survey Respondents</b>	<b>354</b>
<b>Total with Broker Dealers</b>	<b>165</b>
<b>No Broker Dealers</b>	<b>189</b>

# FPA of Orange County

---



## FPA OF ORANGE COUNTY (FPAOC) PARTNER PROGRAM

FPAOC partners are true partners of our chapter. We know the success of both our members and our partners go hand in hand, and we all benefit from these strong relationships. We want our partners to engage with our members, and we work hard to make sure it can happen. Partners participate in our many events, in member communications, on our website, and through word of mouth by being associated with one of the strongest FPA chapters in the country.



## TYPES OF FPA OF ORANGE COUNTY PARTNERS

Interested in testing a partnership idea that is outside of the norm? Now's the time to try it! You will find basic partner levels below, but if we can expand our offerings to meet your needs, we are happy to discuss additional options. Please reach out.



## QUARTERLY EDUCATION MEETING (QEM) PARTNER

**2024 Scheduled Meeting Dates:**  
**February 21, 2024**  
**May 15, 2024**  
**August 21, 2024**  
**November 20, 2024**

# Sponsorships

---

- Gold Partners – Partners may reserve their 10-minute presentation date at time of payment.
- Bronze Partners - Presence at 2 Quarterly Education Meetings (February/August or May/November - Partners may choose from available date groups at time of payment.)

\*Maximum total number of silver and bronze partners at a meeting not to exceed 16. Number of each level may vary

## Gold Partner (limit 10)

**\$5,100 (\$4,900 if renewing)**

- 10-Minute Presentation to members at one QEM
- Event passes for 2 at all 4 QEMs
- Large Company Logo and contact information listed prominently on Partner Webpage
- Display Table Booth at all 4 QEMs - 6 foot table with two chairs
- Welcome Video (up to 20 sec) added to Company PowerPoint Slide in Rotating Slide Show
- Plus all Quarterly Meeting Education Meeting benefits listed below
- Raffle tickets to giveaway that help encourage booth traffic

## Silver Partner (limit 20)

**\$3,600 (\$3,450 if renewing)**

- Event passes for 2 at all 4 QEMs
- Medium Company Logo and contact information listed on Partner Webpage
- Display Table Booth at all 4 QEMs - 6 foot table with two chairs
- Welcome Video (up to 20 sec) added to Company PowerPoint Slide in Rotating Slide Show
- Plus all Quarterly Meeting Education Meeting benefits listed below
- Raffle tickets to giveaway that help encourage booth traffic

## Bronze Partner (limit 20)

**\$2,550 (\$2,450 if renewing)**

- Event passes for 2 at 2 QEMs
- Small Company Logo and contact information listed on Partner Webpage
- Display Table at 2 QEMs - 6 foot table with two chairs
- Your Company's PowerPoint Slide Added to Rotating Slide Show
- Plus all Quarterly Meeting Education Meeting benefits listed below
- Raffle tickets to giveaway that help encourage booth traffic

## Quarterly Meeting Refreshment Partner

**\$1,650**

**Tickets are given out by you!**

- Event passes for 1 at 1 QEM and a table at that particular QEM
- Small Company Logo and contact information listed on Partner Webpage
- Display Table at 2 QEMs x Your Company's PowerPoint Slide Added to Rotating Slide Show
- Plus all Quarterly Meeting Education Meeting benefits listed below

## Sponsors Above Also Receive These Quarterly Education Meeting Benefits:

- Invitation to post-event happy hour, Cocktails & Conversations
- FPAOC Member Names and list of Meeting Attendees (as allowed by FPA policies regarding member privacy)
- Priority Consideration for Keynote Speaker suggestions for QEMs
- Broadcast your educational events in our chapter Event Bulletin



# Sponsorships, cont.

## 2024 Allied Professionals Events- Expand your footprint with members and those who support CFP's!

**LIKELY 2024 EVENT DATES (subject to change): January 11 (Membership and Allied Mixer), April 25, July 18th (Membership and Allied Mixer, and October 23.**

**Sponsorships are PER EVENT. Two mixers are in conjunction with Membership.**

### **Title Sponsor: \$1500 (two available)**

- Three-minute speaking opportunity at the event to discuss your company, products, and services to all attendees
- An opportunity to record a 60 second "get to know you video" sent in all event marketing and invitations over 6 week period. Videos are archived on our AP website page.
- Opportunity to collect business cards and present a raffle prize
- Mention in Chapter e-blasts
- Logo and company link on event webpage
- Includes entry for two people

### **Platinum Sponsor: \$1200 (two available)**

- Your logo on a table sign that will say "Platinum sponsored by..."
- One-minute speaking opportunity at the event to discuss your company, products, and services to all attendees
- Opportunity to collect business cards and present a raffle prize
- Mention in Chapter e-blasts
- Logo and company link on chapter event page
- Includes entry for one person

### **Dessert or Wine Sponsor: \$750 (one available per wine or dessert)**

- Your logo on a table sign that will say "Dessert or Wine sponsored by..."
- Opportunity to collect business cards and present a raffle prize
- Mention in Chapter e-blasts
- Logo and company link on chapter event page
- Includes entry for one person

### **Cash Sponsor: \$500 (unlimited)**

- Mention in Chapter e-blasts
- Includes entry for one person
- Logo and company link on chapter event page

**Quarterly New Member  
Breakfast Sponsorship-  
\$400 per event or \$1,100 for  
all three in-person events in  
March, June, and September**

- Welcome/Introduction as appropriate for event
- Logo, website, video link and contact information displayed on event website and invitation
- Registration for one representative to attend event
- Lists of FPAOC Member Names and Meeting Attendee Names (as allowed by FPA policies regarding member privacy - e.g., no email addresses or phone numbers)

**One Membership Mixer  
Date TBD  
\$1250  
2 available**

- Welcome/Introduction as appropriate for event
- Logo, website, video link and contact information displayed on event website and invitation
- Registration for one representative to attend



# Letter of Agreement

---

Each sponsor is required to sign a Letter of Agreement at the time of payment.

[Click Here to Sign Letter of Agreement](#)



## Contact Us

---



**FINANCIAL  
PLANNING  
ASSOCIATION**

ORANGE COUNTY



Tyler VanZandt, CFA  
Partners Chair



313-269-7611



Partners@FPAOC.org



www.FPAOC.org