

2024 FPA DFW Partner Program

Your Partner in Planning™



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Reach our 800 members through a year-long partnership with FPA Dallas/Fort Worth

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

Thank you for your interest in being a 2024 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 19,000 members nationwide. The FPA DFW chapter is currently one of the largest and most active chapters within the organization. FPA DFW's reach extends well beyond our 800 member base, to include an additional over 900 prospective members who are contacted and promoted to regularly.

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 in February 2024.

If you have questions, please reach out to the 2024 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 2024.

[Register for the FPA DFW 2024 Partner Program](#)

2024 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!

500⁺

member firms
represented



19,000⁺

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 800 professionals in the Dallas/Fort Worth metroplex, and beyond. FPA DFW's reach extends well beyond our 800-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, 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 2024) with anticipated attendance of 250-300 participants. This gives you a premium opportunity to generate strong leads with leaders and decisions makers.

40%

of our membership
are RIAs with over
320 Billion AUM

41%

of our members
are Registered Reps,
representing
89 broker dealers

80%

of our membership
are CFP®s with an
average of 11 years
of membership in FPA



FPA OF DALLAS/FORT WORTH

2024 ANNUAL PARTNERSHIP BENEFITS AT-A-GLANCE

BENEFITS	VALUE	DIAMOND \$8,500	PLATINUM \$6,500	GOLD \$5,000	SILVER \$3,500
Website & Email Marketing					
DFW Newsletter Advertisements (published bi-monthly)	\$400 per ad	4	3	2	1
FPA DFW administered blast e-mail	\$500 each	4	4	4	2
Company logo displayed on FPA DFW website home page	\$600	✓	✓	✓	✓
Logo displayed in opening slides at all chapter meetings	\$400	✓	✓	✓	✓
Quarterly membership list	\$1,500	✓	✓	✓	✓
Events & Speaking Opportunities					
Annual pass to almost all FPA DFW events	\$50-75 per event	2 per event	2 per event	1 per event	1 per event
Speaking engagement at 4th 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>	\$1,200		✓		
10 Minute Sponsor Spotlight – Opportunity to Highlight Your Services	\$750		✓ Chapter Meeting	✓ DFW Board of Dir. Mtg	
Nomination for Annual FPA DFW Partner of the Year Award	\$1,000	✓	✓	✓	✓
FPA DFW Sponsor Appreciation Event Networking opportunity with FPA DFW Board & Leadership Alumni	Priceless	✓	✓	✓	✓
Annual Conference (see page 5 for additional details)					
Exhibit Table at the FPA DFW Conference + attendee list	\$2,250	2 Reps	2 Reps	1 Rep	1 Rep
Promotion of your company on all FPA DFW Conference marketing materials	\$750	✓	✓	✓	✓
Presenting keynote speaker at the FPA DFW Conference	\$2,000	✓			
10 Minute Sponsor Spotlight at the FPA DFW Conference	\$1,500	✓			

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

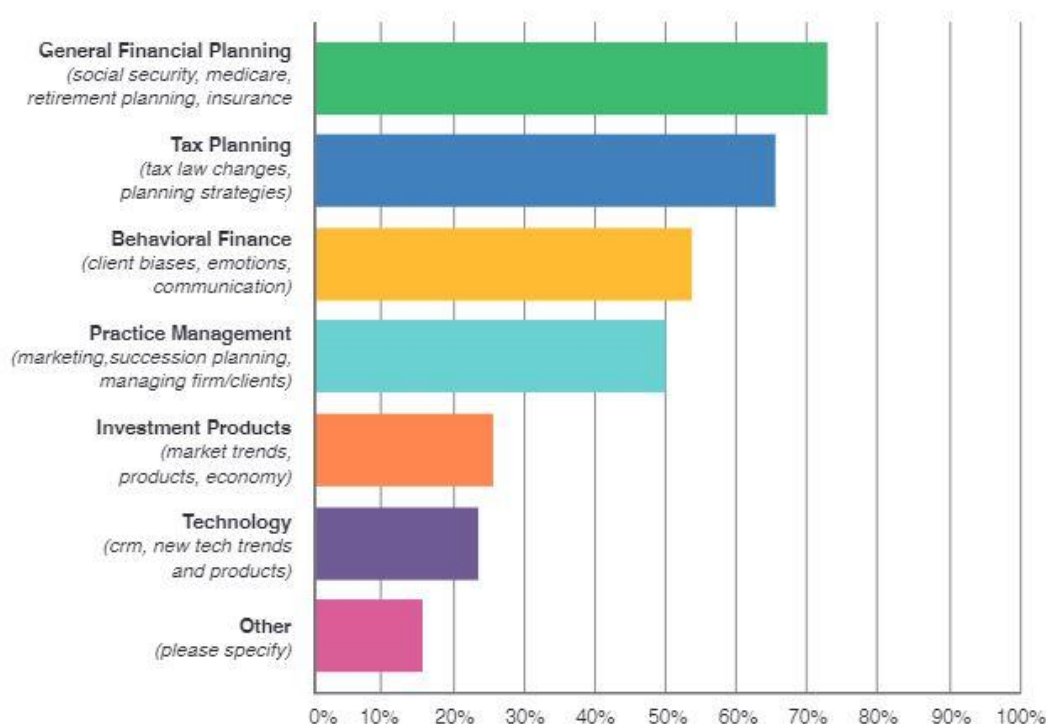
► **Platinum:** Guaranteed speaking spot at a conference breakout session or a chapter meeting. Breakout sessions at the conference are limited and based on availability. Speakers and topics must be reviewed and approved and are selected at the discretion of the FPA DFW Special Events Director and/or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

FPA DFW Annual Conference Benefits Overview

The FPA Dallas/Fort Worth Conference will take place February 2024. 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.

2024 Benefits	Diamond	Platinum	Gold	Silver
Draped exhibit table – placement based on sponsorship level	✓	✓	✓	✓
Copy of FPA DFW Conference attendee list	✓	✓	✓	✓
Speaking engagement (Diamond: Keynote or Platinum: Breakout Session)	✓	✓		
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 & marketing materials	✓	✓	✓	✓
Sponsor recognition throughout the conference (program, signage, conference blast emails, and more)	✓	✓	✓	✓
Conference CE credits, swag, program and literature	✓	✓	✓	✓

Initial Member Survey Results on Topics





2024 Levels

2024 Sponsorship Level	Annual Dues
Diamond	\$8,500
Platinum	\$6,500
Gold	\$5,000
Silver	\$3,500

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Ala Carte Opportunities

FPA DFW Ballpark Event – Opening Day
\$6,500

FPA DFW Summer Ballpark Event
\$3,500

FPA DFW Conference Reception
\$2,500

FPA DFW Pre-Con Reception
\$2,000

FPA Women's Group Social
\$900

Contact Us



Joel Berg, CFP®
2024 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 2024 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.



FINANCIAL
PLANNING
ASSOCIATION

DALLAS
FORT WORTH

📞 (972) 747-0407

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