



2024 FPA Puget Sound Partner Program

Your Partner in Planning™



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Reach our 400 members through a year-long partnership with FPA Puget Sound

Join FPA Puget Sound in elevating the financial planning profession.

Thank you for your interest in being a sponsor of the FPA Puget Sound chapter. As a FPA Puget Sound sponsor you can help further educate and develop our industry. FPA Puget Sound 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. FPA Puget Sound's reach extends well beyond our 400-member base, to include an additional over 500 prospective members who are contacted and promoted to regularly.

At FPA Puget Sound 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 sponsorship with the Puget Sound chapter. We offer annual partnerships that are year-long relationships built upon mutual goals, as well as ala carte sponsorships for the annual FPA Puget Sound Symposium.

If you have questions, please reach out to the FPA Puget Sound Executive Director, Melisa Hall: (206) 501-2161, info@fpapugetsound.org for assistance. We appreciate your interest in sponsoring FPA of Puget Sound and look forward to partnering with you in 2024.

2024 Annual Sponsorship Levels	Annual Dues
Platinum	\$5,000
Gold	\$3,500
Silver	\$2,000

2024 FPA Puget Sound Symposium Sponsorships

See page 5-6 for symposium sponsorship opportunities and pricing



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

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



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 Puget Sound is your gateway and connection to a chapter comprised over 400 professionals in the Puget Sound area, and beyond. FPA Puget Sound's reach extends well beyond our 400-member base, to include an additional 500+ prospective members.



The Value of Partnering with FPA of Puget Sound

PERSONAL CONNECTIONS

FPA Puget Sound 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.

PUT YOUR BUSINESS FRONT AND CENTER

You are encouraged to attend all FPA Puget Sound 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 Puget Sound Symposium (May 9, 2024) with anticipated attendance of 150+ participants. This gives you a premium opportunity to generate strong leads with leaders and decisions makers. This year's symposium will take place at the **NEW [Seattle Convention Center Summit](#)** building.

FPA OF PUGET SOUND

2024 ANNUAL PARTNERSHIP BENEFITS AT-A-GLANCE

BENEFITS	PLATINUM \$5,000	GOLD \$3,500	SILVER \$2,000
Website & Email Marketing			
Company logo displayed on FPA Puget Sound website home page	Linked Logo	Linked Logo	Linked Logo
Company logo displayed on all FPA Puget Sound email marketing	Linked Logo	Linked Logo	Linked Logo
Opportunity to provide advertisements for monthly e-newsletter, the <i>NewsFlash</i>	Three times a year	Once per year	
Opportunity to send two marketing emails to the chapter database (per year)	✓		
Annual Symposium			
Complimentary Symposium Registrations	②	①	
Promotion in all Annual Symposium Marketing (website, emails, program, signage)	✓	✓	
Exhibit Table at Annual Symposium	✓	✓	✓
Events & Training			
Opportunity to provide brochures/marketing materials at attended chapter meetings	✓	✓	✓
Company logo displayed in opening slide show at all chapter meetings	✓	✓	✓
Complimentary passes to all chapter meetings	②	①	①
10-minute sponsor spotlight at chapter meeting	①	①	
Copy of attendee list at each attended chapter meeting	✓	✓	
Opportunity to have one self-hosted educational webinar which FPA Puget Sound will market to the FPA database (must qualify for CE credits)	✓		



FPA OF PUGET SOUND

2024 SYMPOSIUM SPONSOR BENEFITS AT-A-GLANCE

SYMPOSIUM SPONSOR BASELINE BENEFITS

- ✓ Linked logo on Symposium webpage
- ✓ Logo on Symposium marketing & emails
- ✓ Access to attendee list
- ✓ Mention during chapter update
- ✓ Recognition in Symposium slide show
- ✓ ***Complimentary registrations (based on tier)**

TITLE SPONSOR - \$4,500 (ONE AVAILABLE)

5-minute sponsor spotlight during opening remarks to introduce your company and offerings (may also include 1-2 min. video)	Featured logo on Symposium webpage
Logo signage for duration of the day on the main stage	Introduce keynote speaker
*2 complimentary registrations	Opportunity to provide company fliers on tables in general session room

SPEAKER SPONSOR - \$2,500 (FOUR AVAILABLE)

- ✓ Exclusive invite only opportunity for Symposium breakout session
- ✓ Provide a speaker from your company to speak about services. Content must be educational (no sales) and CE eligible
- ✓ 5-minute sponsor spotlight & speaker introduction
- ✓ Company logo on Symposium website, signage, and program
- ✓ Company logo on Symposium website, signage, and program
- ✓ *1 complimentary representative, in addition to speaker
- ✓ *(Optional) Discounted exhibit booth – additional \$1,000 add-on*

LUNCH SPONSOR - \$2,000 (ONE AVAILABLE)

- ✓ 5-minute sponsor spotlight to introduce your company & offerings
- ✓ Company logo on Symposium website, signage, and program
- ✓ Opportunity to provide company fliers on lunch tables for attendees
- ✓ *2 complimentary registrations
- ✓ *(Optional) Discounted exhibit booth – additional \$1,000 add-on*

WIFI SPONSOR - \$1,000 (ONE AVAILABLE)

- ✓ Your company name as the WIFI network name
- ✓ Company logo all WIFI signage throughout the event (+ program)
- ✓ Company logo on Symposium website, signage, and program
- ✓ *1 complimentary registration
- ✓ *(Optional) Discounted exhibit booth – additional \$1,000 add-on*

NAME BADGE SPONSOR - \$900 (ONE AVAILABLE)

- ✓ Logo on all attendee name badges
- ✓ *1 complimentary registration

WINE DOWN SPONSOR - \$2,000 (ONE AVAILABLE)

- ✓ 3-minutes to introduce your company at the end of the closing keynote session. Invite everyone to join the wine-down social hour!
- ✓ Announce the winner for next year’s complimentary symposium registration
- ✓ Logo branded drink tickets provided to each guest
- ✓ Company logo on Symposium website, signage, and program
- ✓ *1 complimentary registration
- ✓ *(Optional) Discounted exhibit booth – additional \$1,000 add-on*

GENERAL SESSION SPONSOR - \$1,500 (ONE AVAILABLE FOR CLOSING KEYNOTE)

- ✓ Introduce closing keynote speaker
- ✓ 3-minute sponsor spotlight to introduce your company & offerings
- ✓ Company logo on Symposium website, signage, and program
- ✓ Opportunity to provide company fliers on lunch tables for attendees
- ✓ *1 complimentary registration
- ✓ *(Optional) Discounted exhibit booth – additional \$1,000 add-on*

GIVEAWAY SPONSOR - \$1,000 (ONE AVAILABLE)

- ✓ 2-minutes to introduce your company and offerings before the drawings
- ✓ *1 complimentary registration
- ✓ Company logo on Symposium website, signage, and program

BREAK SPONSOR - \$950 (TWO AVAILABLE – BREAKFAST or SWEET-TOOTH BREAK)

1. Company logo on Symposium website, signage, and program
2. Signage outside of breakroom
3. *1 complimentary registration





FPA OF PUGET SOUND 2024 SYMPOSIUM EXHIBITOR OPPORTUNITIES

EXHIBITOR BASELINE BENEFITS

- ✓ Two complimentary registrations
- ✓ Chance to connect with 150+ financial advisors
- ✓ Recognition during chapter update
- ✓ Logo on Symposium website & marketing materials
- ✓ Access to attendee list
- ✓ Networking during Symposium

EXHIBIT TABLE SPONSOR - \$1,750

- ✓ One six-foot draped exhibit table
- ✓ Two complimentary symposium registrations
- ✓ Logo on Symposium webpage, program and signage
- ✓ Additional registrations - \$250
- ✓ (Symposium Sponsors may add on an exhibit table at a discounted rate during the initial registration process – see benefit sections on page 6)



BECOME A PARTNER!

VISIT US ONLINE OR REACH OUT TO THE OFFICE TODAY

[FPA Puget Sound Annual Sponsor Registration Form](#)

[FPA Puget Sound Symposium Sponsor Registration Form](#)

If you would like to discuss partner opportunities in greater detail, please contact the FPA of Puget Sound office at (206) 501-2161 or info@fpapugetsound.org.

All annual sponsorship packages are based on the 2024 calendar year. FPA of Puget Sound reserves the right to require all membership literature, correspondence, and ad submissions to conform to our policies and format regulations.