



FINANCIAL
PLANNING
ASSOCIATION

ORANGE COUNTY

2024 Partner Opportunities

Financial Planning Association of Orange County

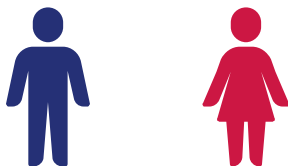


About FPA of Orange County

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

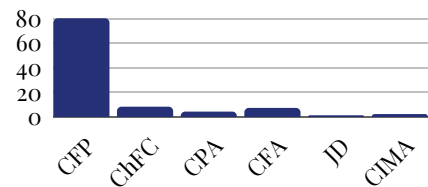
Demographics

Male 73% Women 27%



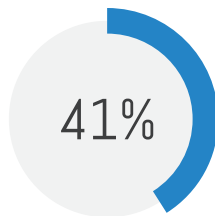
Designations

% of Chapter Members



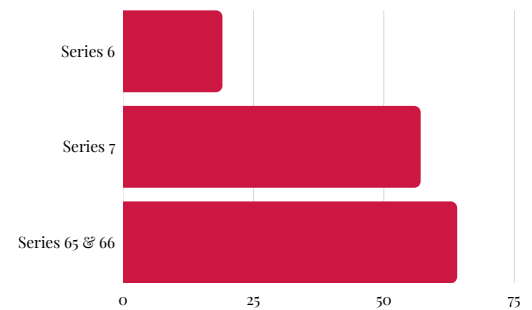
Independent RIA

41% of Chapter Members



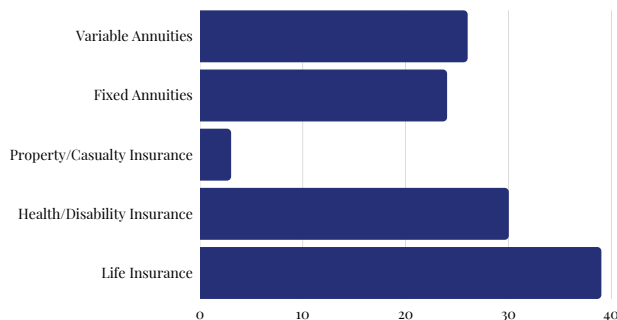
Security Licenses

% 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

Total of Survey Respondents	354
Total with Broker Dealers	165
No Broker Dealers	189

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
- 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



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ORANGE COUNTY



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Partners Chair



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www.FPAOC.org