

# 2024 FPA Houston Corporate Partnership Prospectus



**Your Partner in Planning™**

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# Become a 2024 FPA Houston Partner

## Join FPA Houston in elevating the financial planning profession.

At FPA of Houston, we are proud to work 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 Houston chapter. Partnerships are year-long relationships built upon mutual goals. There are multiple levels of partnership, each offering high-impact benefits and opportunities. We appreciate your interest in partnering with the FPA of Houston and hope to work with you in 2024.

The *Benefits at a Glance* explains the four different levels, their benefits, and the costs. The Diamond, Platinum, Gold and Silver levels offer exhibition at our Annual Symposium (September 12, 2024), which will take place at the Briar Club in Houston, TX.

FPA of Houston remains one of the largest and most active chapters within the FPA. In fact, FPA of Houston's reach extends well beyond our 450+ member base, to include an additional 600+ prospective members who are promoted to regularly on our partners' behalf. FPA of Houston is being contacted regarding sponsorships more than ever today as companies look for ways to connect with the financial planning community.

The first step in securing your spot for 2024 is to fill out the online [Corporate Partner Agreement](#).

If you have any questions, please reach out to the FPA Houston chapter directly at (713) 253-6928 or via email [execdir@fpahouston.org](mailto:execdir@fpahouston.org).

2024 Sponsorship Level	Annual Dues
Diamond	\$8,000
Platinum	\$5,500
Gold	\$4,000
Silver	\$2,500



# 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 of Houston has an average of 450+ financial professional members representing a broad spectrum of specialties including financial planning, broker dealer services, insurance/annuities, mutual funds, banks/thrifts/trust, law, CPA's, investment management and accounting and tax specialists. Your promotional activities reach 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 HOUSTON MEMBERS ARE A HIGHLY TARGETED MARKET FOR YOUR PRODUCT OR SERVICE."**

The sponsorship packages offer 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 Houston area and one of the top FPA chapters in the country.



**20,000+**  
Members Nationwide



**80+**  
Chapters in the U.S.

## Where Financial Planning Practitioners Come Together.

Our members are dedicated to elevating each other, and 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's more important than ever in today's business environment to stay connected. FPA Houston is your gateway and connection to a chapter comprised over 450+ financial planning professionals and leaders in the Houston financial planning community. FPA Houston is one of the Financial Planning Association's largest and most active chapters. In fact, FPA Houston's reach extends well beyond our member base, to include an additional 600 prospective members who are contacted and promoted to regularly on our sponsors' behalf.

## PARTNER BENEFITS

### PERSONAL CONNECTIONS

FPA Houston continually strives to develop new avenues to keep our partners connected with our members, both in-person and through hybrid events.

### RECOGNITION

Visibility as an FPA of Houston partner throughout the year at all chapter events, all newsletters, and on our website.

### EXPOSURE

Our partners are encouraged to attend all FPA Houston 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.

### OPPORTUNITIES

FPA Houston partners can meet and share your message with attendees at all chapter events. It's an excellent time for networking opportunities and potential future business.

### EXHIBIT SPACE

Exhibit space at the 2024 FPA Houston Symposium with anticipated attendance of 160+ participants. This gives you a premium opportunity to generate strong leads with leaders and decision makers.

# 2024 FPA HOUSTON BENEFITS AT A GLANCE

**Diamond**  
**\$8,000**

**Platinum**  
(Limit 8)  
**\$5,500**

**Gold**  
**\$4,000**

**Silver**  
**\$2,500**

	Diamond \$8,000	Platinum (Limit 8) \$5,500	Gold \$4,000	Silver \$2,500
FPA Houston Partner & Volunteer Appreciation Event Networking opportunity with the FPA Houston Board & Leadership Alumni (Fall 2024)	✓	✓	✓	✓
Quarterly membership list & demographic report	✓	✓	✓	✓
Your company logo & contact information on FPA Houston website & regular recognition as a FPA Houston Partner	✓	✓	✓	✓
Exhibit table at the FPA Houston Symposium + attendee list	2 Attendees	2 Attendees	1 Attendee	1 Attendee
Annual pass to all FPA Houston chapter luncheon meetings	2 per event	2 per event	1 per event	1 per event
Promotion: Add your conferences and webinars to the FPA website and/or newsletter	✓	✓	✓	
FPA Administered Social Media Post <i>Social media post to be partner composed. This is a great way of promoting your events, Send messaging and share on goings within your company with members and FPA Houston followers</i>	✓	✓	✓	
Blast E-Mail to FPA Houston Membership • Diamond (3x) Platinum (3x) Gold (2x)	✓	✓	✓	
Bi-Monthly Newsletter Advertisements	3 ads	2 ads	1 ads	
Speaking engagement at 3 <sup>rd</sup> Annual FPA Houston Virtual Super CE Day	✓	✓		
10-minute Sponsor Spotlight @ FPA Houston Symposium	✓			
Presenting Speaker: CE eligible 50-minute educational speaking opportunity at the 2024 symposium (topic & speaker to be approved by FPA Houston)				
10-minute Sponsor Spotlight at a FPA Houston chapter meeting		✓		
Presenting Speaker: 50-minute educational speaking opportunity at a chapter meeting (topic & speaker to be approved by FPA Houston)		✓		

The FPA of Houston 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 Houston Annual Symposium

The FPA Houston Symposium will take place September 12<sup>th</sup>, 2024 at the Briar Club. This event is the annual event for partners that seek to connect with experienced planners who typically handle high-net worth clients. The FPA Houston Symposium benefits are included for every sponsorship level as follows.

Benefit	Diamond	Platinum	Gold	Silver
Draped 6' exhibit table	•	•	•	•
Symposium attendee list	•	•	•	•
60 - 90 second pre-recorded partner commercial	•	•		
* Speaking engagement	•	•		
Logo recognition on event website, signage, marketing materials, advertisements and program	•	•	•	•
Partner representative registrations	2	2	1	1
Logo recognition on FPA Houston website and blast emails	•	•	•	•
Partner recognition throughout the symposium	•	•	•	•
CE credits, swag bag, program and literature	•	•	•	•

For more information on the FPA Houston Symposium, please contact our office at:

[execdir@fpahouston.org](mailto:execdir@fpahouston.org)

(713) 253-6928

## Speaking Opportunities

► **Diamond:** CE Eligible keynote speaker at the Symposium. Topics must be reviewed and approved by FPA.

► **Platinum:** Speaking spot at a Symposium or a chapter meeting. Symposium speaking spots are limited and based on availability. Speakers and topics must be reviewed and approved and are selected at the discretion of the FPA Houston Education Committee.

# 2024 Events

FPA of Houston events provide exclusive access to financial advisors in the greater Houston area. FPA 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 a smaller and more personal setting.

*Dates are subject to change and additional dates may be added throughout the year.*

- 1/18/2024 Advisor Exchange
- 1/23/2024 Chapter Meeting
- 2/1/2024 NexGen Event
- 3/1/2024 Women's Group Luncheon
- 3/26/2024 Chapter Meeting
- Spring 2024 Member Social Event
- 4/10/2024 Advisor Exchange
- 4/24/2024 NexGen Event
- 5/2/2024 CFP Ethics & Networking Event @ a local Brewery
- 5/31/2024 Women's Group Luncheon
- 6/4/2024 Chapter Meeting
- 7/23/2024 Advisor Exchange
- 8/1/2024 NexGen Event
- 8/27/2024 Chapter Meeting
- 8/22/2024 Member Social Event
- 9/5/2024 Women's Group Luncheon
- [9/12/2024 FPA Houston Symposium & Reception at Briar Club](#)
- 10/17/2024 Advisor Exchange
- 10/23/2024 NexGen Event
- 11/12/2024 Chapter Meeting
- 11/28/2024 Women's Group Luncheon
- 11/28/2024 Partner & Leadership Appreciation Event



## Contact Us



**FPA of Houston**

Amanda Duran, Executive Director

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Houston, Texas 77055

📞 (713) 253-6928

✉ [execdir@fpahouston.org](mailto:execdir@fpahouston.org)

💻 [www.fpahouston.org](http://www.fpahouston.org)

Thank you for considering a partnership with FPA of Houston.

If you would like to discuss how a partnership with FPA can greatly enhance your access to a vibrant professional organization full of CFP® professionals, you have come to the right place! I would love to discuss our opportunities in greater detail with you. Contact me any time at (713) 253-6928 or [execdir@fpahouston.org](mailto:execdir@fpahouston.org).

***We are very appreciative of all you do for us!***

*All Corporate Partnerships are based on the 2024 calendar year. FPA of Houston reserves the right to require all 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 FPA Houston Symposium or any other speaking events.*

**Your Partner in Planning™**



# 2024 Corporate Partner Agreement

2024 Partnership Level	Price
Diamond	8,000
Platinum	5,500
Gold	4,000
Silver	2,500

To newly apply or renew your partnership online

[\*\*CLICK HERE\*\*](#)

You will be redirected to the online form