FPA
FINANCIAL PLANNING ASSOCIATION

WESTERN NEW YORK

SPONSORSHIP PROGRAM

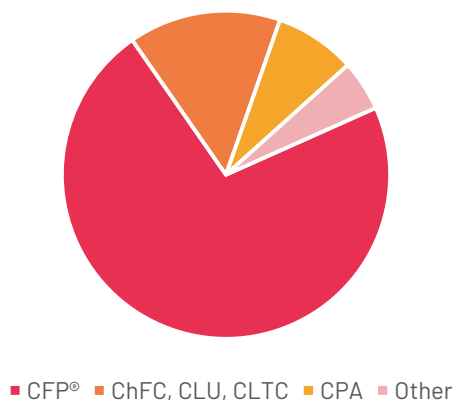PO Box 368, Amherst, NY 14226 | www.fpawny.org | (716) 597-3905

The Financial Planning Association® (FPA®) is the largest membership organization for CFP® professionals in the US. Members of this association also include those who support the financial planning process. Our members adhere to the highest standards of professional competence, ethical conduct, and clear, complete disclosure to those they serve. The WNY chapter has been in existence since January 1, 2006, and is one of 78 chapters of the FPA®. Our chapter has 105 members managing over $9 billion for 13,000 clients.

Our chapter members meet monthly for lunch from September through June for educational seminars to satisfy our continuing education requirements to maintain our credentials and promote an environment for learning, networking, and sharing ideas among our members and guests. In addition, we offer a half day symposium in the fall that features nationally known speakers on insurance, investments, taxation, retirement planning and estate planning.
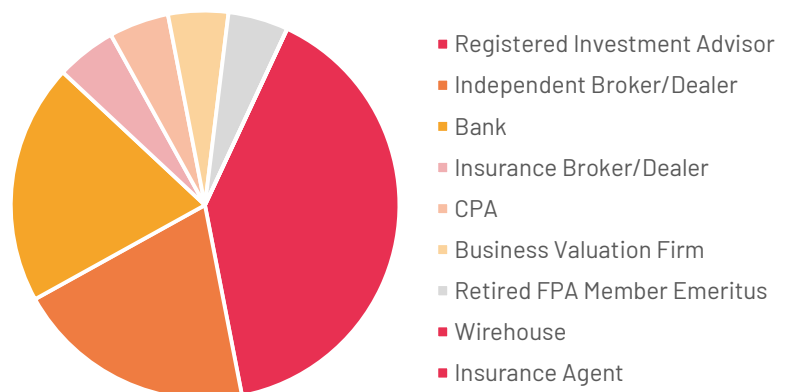
As a Chapter Sponsor you will be supporting one of the industry's premier associations and receiving exposure to over 100 financial professionals. Sponsorship opportunities include Gold ($3,000), Silver ($2,500), Bronze ($2,000), Meeting ($1,500), and Webinar Sponsor ($1,000). Please review the next page for details regarding each sponsorship level.

Membership Composition

Professional Designations

■ CFP® ■ ChFC, CLU, CLTC ■ CPA ■ Other

Member Affiliation

■ Registered Investment Advisor
■ Independent Broker/Dealer
■ Bank
■ Insurance Broker/Dealer
■ CPA
■ Business Valuation Firm
■ Retired FPA Member Emeritus
■ Wirehouse
■ Insurance Agent

FPA WNY Sponsorship Program Detail

Partner Benefits	Gold $3,000	Silver $2,500	Bronze $2,000	Meeting $1,500	Webinar $1,000
Meeting Sponsorship	Exclusive Luncheon	Exclusive Luncheon	Exclusive Luncheon	Exclusive Luncheon	Webinar Meeting
Email access to members (Limited to once per month)	12 Months	12 Months	6 Months	1 Month	1 Month
Attendee List	X	X	X	X	X
Luncheon Tickets (May be used any time during the 12 months)	20	10	4	2	
Presentation prior to the program (Approx. 5-10 minutes)	X	X	X		
Website logo & link for 12 months	X	X	X		
Participation in our Networking Event	X				
Exhibit table at Symposium (Introduction to all attendees)	X				