

# 2026 PARTNERSHIPS

FPA DALLAS/FORT WORTH

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**FINANCIAL  
PLANNING  
ASSOCIATION**

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**DALLAS  
FORT WORTH**

# Reach our DFW members through an annual partnership with FPA Dallas/Fort Worth

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

Your partnership represents more than just sponsorship—it’s a shared commitment to advancing the financial planning profession. By aligning with FPA DFW, you’ll gain direct access to a dynamic network of industry leaders and organizations driving innovation and excellence in financial planning. This connection offers significant opportunities to elevate your organization’s visibility and influence within the profession.

At FPA DFW, we are proud to cultivate meaningful, long-term partnerships with a diverse array of companies and organizations dedicated to the success of financial planners. We believe that collaboration is essential, and we view our corporate partners as true allies in our mission to enrich and empower the financial planning community. Together, we work to provide professionals with the tools, resources, and experiences they need to thrive.

We welcome companies that are passionate about the growth of the financial planning profession and aligned with our core values to explore this exciting partnership opportunity. Our corporate partnerships are designed to be year-round collaborations built on shared goals and a unified vision for impact.

To help you determine the best fit for your organization, please review our **Benefits-at-a-Glance** page, which outlines four partnership tiers, each with detailed benefits and pricing. All tiers include exhibit space at our **2026 Annual Conference**, scheduled for **February 19, 2026**, at the **Irving Convention Center**—an exceptional occasion to showcase your organization and engage with financial planning professionals from across the region.

If you have any questions or need additional information, please feel free to reach out to our FPA DFW Partnerships Director, **Joe Meylor**, at [partnerships@fpadfw.org](mailto:partnerships@fpadfw.org), or our Executive Director, **Melisa Hall**, at [execdir@fpadfw.org](mailto:execdir@fpadfw.org) or (972) 747-0407.

We look forward to the opportunity to partner with you in shaping the future of financial planning.

2026 Sponsorship Level	Annual Dues
Diamond	\$8,500
Platinum	\$6,900
Gold	\$5,500
Silver	\$3,750



# 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<sup>+</sup>

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



**17,000+**  
Members Nationwide



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

## Where Financial Planning Practitioners Come Together

At FPA DFW, our mission is to elevate the financial planning profession through meaningful collaboration, continuous education, and unwavering support. Our members are dedicated not only to advancing their own professional development but also to raising the standard of service delivered across the industry. In today's fast-changing business environment, staying connected is more important than ever. With a strong network of over 800 financial planning professionals across the Dallas/Fort Worth metroplex, our chapter serves as a critical hub for those looking to grow their expertise and expand their professional reach.

Our influence extends beyond our current membership, engaging more than 900 additional prospective members who are eager to contribute to and benefit from the collective strength of our community. Together, we are building a more informed, connected, and client-focused profession—ready to meet the evolving needs of those we serve.

## The Value of Partnering with FPA of Dallas/Fort Worth

### PERSONAL CONNECTIONS

At FPA DFW, we are dedicated to cultivating strong, lasting relationships between our partners and members. Each month, we provide exclusive opportunities for our partners to connect with our vibrant community through a variety of events designed to foster engagement, visibility, and trust. These events offer valuable platforms to expand your reach, engage with prospective clients and businesses, and deepen relationships with your existing network. Every interaction is thoughtfully designed to encourage meaningful dialogue and promote mutual growth. We invite you to be part of this dynamic ecosystem—where partnership goes beyond visibility and becomes a catalyst for lasting business connections and shared success. Let's work together to build a thriving, collaborative financial planning community.

### PARTNER RECOGNITION

Throughout the year, our partners receive prominent visibility at all FPA DFW chapter events, ensuring their brand is recognized and valued within our professional community. In addition, our website features a dedicated section to highlight our partners, making it easy for visitors to learn more and connect directly with them.

### ELEVATE YOUR BUSINESS PRESENCE

We invite you to attend all FPA DFW events, where you'll be recognized as a valued partner and have the opportunity to engage directly with our members. These events provide a powerful platform to build lasting, mutually beneficial relationships with financial professionals who are actively seeking innovative solutions to better serve their clients. Your presence at these gatherings will position you as a trusted resource and elevate your visibility within the financial planning community.

### SHOWCASE YOUR BRAND AT OUR ANNUAL CONFERENCE

As a valued FPA DFW Corporate Partner, you are guaranteed an exhibit booth at the Annual FPA DFW Conference, taking place on **Thursday, February 13, 2026**. With an anticipated attendance of **350–400 financial planning professionals**, this premier event offers a powerful platform to connect with key decision-makers and industry leaders.

Your exhibit space provides not only high-impact brand visibility, but also the opportunity to engage directly with potential clients and strategic partners who are actively seeking innovative products and services. Don't miss this exceptional opportunity to showcase your offerings, strengthen your presence in the industry, and generate meaningful leads in a dynamic, face-to-face setting.



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# 2026 ANNUAL PARTNERSHIP BENEFITS AT-A-GLANCE

BENEFITS	VALUE	DIAMOND \$8,500	PLATINUM \$6,900	GOLD \$5,500	SILVER \$3,750
<b>Website &amp; Email Marketing</b>					
DFW Newsletter Advertisements (published bi-monthly)	\$400 per ad	6	3	2	1
Company administered blast email to FPA DFW members.	\$500 each	4	4	3	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	✓	✓	✓	✓
<b>Events &amp; Speaking Opportunities</b>					
Annual pass to almost all FPA DFW events	\$50-75 per event	3 per event	2 per event	1 per event	1 per event
Speaking engagement at 4th Annual FPA DFW Virtual CE Day	\$950	✓	✓		
Exhibit table at any FPA DFW chapter meeting (up to 2x)	\$1,000	✓	✓		
One exclusive sponsor hosted webinar – promoted by FPA	\$1,200	✓	✓		
10 Minute Sponsor Spotlight – Opportunity to Highlight Your Services	\$750	✓ <i>Conference</i>	✓ <i>Chapter Meeting</i>		
<b>Exclusive!</b> Cheers! Happy Hour with the FPA DFW Board – Drinks are on us!	\$600	✓	✓		
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	✓	✓	✓	✓
<b>Annual Conference</b> (see page 5 for additional details)					
Exhibit Table at the FPA DFW Conference + attendee list	\$2,250	3 Reps	2 Reps	1 Rep	1 Rep
Promotion of your company on all FPA DFW Conference marketing materials & table signage	\$750	✓	✓	✓	✓
Presenting keynote speaker at the FPA DFW Conference	\$2,000	✓			
10 Minute Sponsor Spotlight at the FPA DFW Conference	\$1,500	✓			

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

► **Platinum:** Platinum partner exclusive webinar, hosted by partner, promoted by FPA.



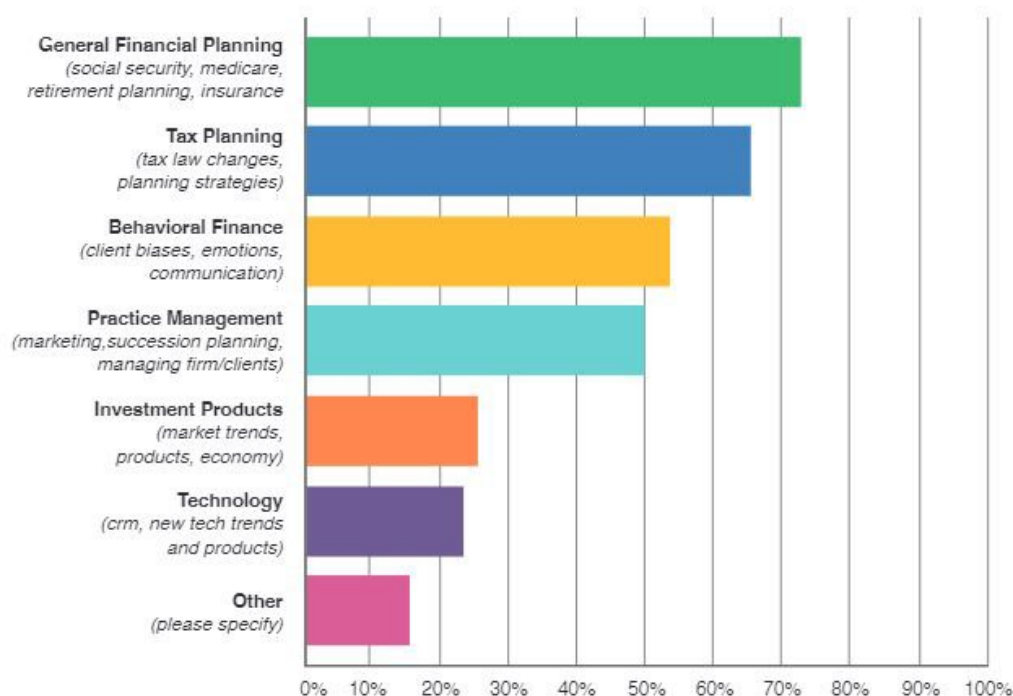
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## FPA DFW Annual Conference Benefits Overview

The Annual FPA Dallas/Fort Worth Conference will take place Thursday, February 19, 2026. 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.

2026 Benefits	Diamond	Platinum	Gold	Silver
Draped exhibit table – placement based on sponsorship level	✓	✓	✓	✓
FPA DFW Conference attendee list	✓	✓	✓	✓
Speaking engagement (Diamond: Keynote speaker at lunch)	✓			
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





## 2026 Corporate Partner Tiers

2026 Sponsorship Level	Annual Dues
Diamond	\$8,500
Platinum	\$6,900
Gold	\$5,500
Silver	\$3,750

## Contact Us



**Joseph (Joe) Meylor, CFP®, CPWA®**  
Carter Financial Management  
FPA DFW Partnerships Director



**Melisa Hall**  
FPA DFW  
Executive Director

We invite you to explore exciting partnership opportunities with the Financial Planning Association of Dallas/Fort Worth (FPA DFW). If you would like to learn more about how we can collaborate, please contact Joe Meylor, our Partnerships Director, at [partnerships@fpadfw.org](mailto:partnerships@fpadfw.org). He will be happy to discuss potential synergies and ways we can work together for mutual benefit.

For any questions about the advantages of partnering with us or general inquiries about our chapter, feel free to reach out to Melisa Hall, our Executive Director, at (972) 747-0407 or at [execdir@fpadfw.org](mailto:execdir@fpadfw.org).

We look forward to connecting with you soon!

*Corporate Partnerships are based on the 2026 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 to be eligible for a sponsor speaker presentation time for the chapter meetings, the annual FPA DFW Conference or other speaking events.*



📞 (972) 747-0407

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

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



# Individual Event Sponsorship Opportunities

Please note that these opportunities are specific to individual events and do not include the benefits associated with annual sponsorships. Additionally, they do not provide exhibit booth space at the annual FPA DFW Conference.

## FPA DFW Ballpark Event *(Limit 1)*

**Exclusive Sponsorship Opportunity: Annual FPA DFW Ballpark Event & Texas Rangers Home Opener**

**Date:** Friday, April 3, 2026

**Attendance:** 100

**\$7,000**

**Venue:** Private FPA DFW Suite at the ballpark

**Includes:** 4 Tickets, 1 parking pass

## FPA DFW Summer Ballpark Event *(Limit 1)*

**Exclusive Sponsorship Opportunity: Annual FPA DFW Summer Ballpark Event**

**Date:** TBA (August/September)

**Attendance:** 50

**\$3,500**

**Venue:** Private FPA DFW Suite at the ballpark

**Includes:** 2 Tickets, 1 parking pass

## FPA DFW Spring Social/Networking Event *(Limit 2)*

**Sponsorship Opportunity: FPA DFW Spring Networking Event**

*Limited to only 2 exclusive sponsors*

**Date:** TBA (April/May)

**Attendance:** 60-70

**\$2,000**

## FPA DFW Fall Social/Networking Event *(Limit 2)*

**Sponsorship Opportunity: FPA DFW Fall Networking Event**

*Limited to only 2 exclusive sponsors*

**Date:** TBA (September/October)

**Attendance:** 60-70

**\$2,000**

## Annual Intern Appreciation Event *(Limit 1)*

**Sponsorship Opportunity: Annual Intern Appreciation Event**

*Limited to only 1 exclusive sponsor*

**Date:** TBA (June/July)

**Attendance:** 60-70

**\$1,500**

## Allied Professionals Event Sponsor *(Limit 1)*

Do we include this?

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## Career Development Event Sponsor *(Limit 1)*

Career Development Event Sponsor

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