

2026 PARTNERSHIPS

FPA PUGET SOUND



Your Partner in Planning™



FINANCIAL
PLANNING
ASSOCIATION

PUGET SOUND

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

Join FPA Puget Sound in elevating the financial planning profession.

We appreciate your interest in becoming a sponsor of the FPA Puget Sound Chapter. By partnering with us, you play a vital role in advancing education and professional development within the financial planning industry.

As a sponsor, you'll have a unique opportunity to connect with leading individuals and organizations at the forefront of industry knowledge and expertise. Sponsoring FPA Puget Sound not only increases your organization's visibility but also enhances your brand awareness within the financial planning community.

The Financial Planning Association includes 80 chapters and more than 17,000 members nationwide. Locally, our chapter consists of over 400 members, and we actively engage with an additional 500 prospective members—giving you regular opportunities to promote your services and connect with a broader audience.

Join us in our mission to educate and empower financial professionals. Let us help you elevate your organization's profile while making a lasting impact on the future of the financial planning profession.

If you have any questions or would like to learn more about sponsorship opportunities for 2026, please contact our Executive Director, Melisa Hall, at (206) 501-2161 or info@fpapugetsound.org.

We look forward to partnering with you!

2026 Annual Sponsorship Levels	Annual Dues
Platinum	\$5,000
Gold	\$3,900
Silver	\$2,750

2026 FPA Puget Sound Symposium Sponsorships
Please see pages 5–6 for single symposium sponsorship options and associated 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



17,000⁺

Members Nationwide



80⁺

Chapters in the U.S.

Where Financial Planning Practitioners Come Together.

FPA's commitment is to elevate the financial planning profession through collaboration and connection. At FPA Puget Sound, our members recognize that as we grow and develop as practitioners and planners, we enhance our ability to serve our clients effectively, both now and in the future. In today's rapidly changing business environment, the importance of staying connected cannot be overstated.

FPA Puget Sound serves as your essential gateway to a network of over 400 dedicated professionals located in the Puget Sound area and beyond. Our chapter is not just about numbers; it represents a vibrant community of practitioners who share a common goal of advancing the financial planning profession. Additionally, our reach extends to over 500 prospective members who are eager to join this dynamic community.

We invite you to engage with us, expand your professional network, and enhance your skills. Together, we can ensure that we are not only meeting the needs of our clients today but also preparing for the challenges and opportunities of tomorrow. Join us in this endeavor and be part of a transformative movement within the financial planning profession.



The Value of Partnering with FPA of Puget Sound

CONNECTIONS

FPA Puget Sound is dedicated to fostering strong connections between our partners and members through the ongoing development of innovative avenues designed to enhance these relationships. Our commitment to providing both in-person and virtual opportunities ensures that you can effectively reach new clients and businesses while simultaneously reinforcing your existing connections.

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.

EXPOSURE

Exhibit space at the annual FPA Puget Sound Symposium (**April 16, 2026**) with anticipated attendance of **300+ participants**. This gives you a premium opportunity to generate strong leads with leaders and decisions makers. The 2026 symposium will be returning to the [Seattle Convention Center Summit](#) building.



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2026 ANNUAL PARTNERSHIP BENEFITS AT-A-GLANCE

BENEFITS	PLATINUM \$5,000	GOLD \$3,900	SILVER \$2,750
Website & Email Marketing			
Company logo displayed on FPA Puget Sound website home page	Linked Logo	Linked Logo	Linked Logo
Company logo displayed on FPA Puget Sound email marketing	Linked Logo	Linked Logo	Linked Logo
Opportunity to provide advertisements for monthly e-newsletter, the <i>NewsFlash</i>	Monthly	3x Annually	1x Annually
Opportunity to send two marketing emails to the chapter database (per year)	☑		
Annual Symposium			
Complimentary Symposium Registrations (Number of passes included varies by sponsorship level)	3 registrations	2 registrations	1 registration
Featured in all symposium-related marketing, including the event website, promotional emails, printed program, and on-site signage —maximizing your visibility to attendees and industry professionals.	☑	☑	☑
Exhibit Table at Annual Symposium (Preferred placement by sponsor level)	☑	☑	☑
Events & Training			
50-Minute Guest Speaker Opportunity Present as a guest speaker during a chapter meeting or a symposium breakout session , showcasing your expertise to a targeted audience of financial professionals.	☑		
Opportunity to provide brochures/marketing materials at chapter meetings (advance notice requested so that we can ensure table space)	☑	☑	☑
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	1x		
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)	1x		



2026 SYMPOSIUM SPONSOR BENEFITS AT-A-GLANCE

SYMPOSIUM SPONSOR BASELINE BENEFITS

- | | |
|---|---|
| <input checked="" type="checkbox"/> Linked logo on Symposium webpage | <input checked="" type="checkbox"/> Sponsor recognition during chapter update |
| <input checked="" type="checkbox"/> Logo branding on Symposium marketing & emails | <input checked="" type="checkbox"/> Sponsor recognition in symposium slide show |
| <input checked="" type="checkbox"/> Access to symposium attendee list (subject to FPA policy) | <input checked="" type="checkbox"/> Complimentary registrations based on tier |

FPA PUGET SOUND SYMPOSIUM TITLE SPONSOR - \$5,000

5-Minute Opening Remarks During opening remarks, introduce your company and offerings to all attendees.	Top logo placement on symposium webpage & marketing materials
Prominent onsite signage for duration of the day	Introduce 2026 keynote speaker (Ed Slott)
Up to 4 complimentary passes + group discount for additional reps	Opportunity to provide company fliers on tables in main ballroom
Social media spotlight	Exhibit table in prime location
Logo on attendee name badges	Attendee Contact List <i>(Subject to FPA policy)</i>

***Exhibit tables are included with the following four sponsorships.**

***Exhibit tables are not included with the sponsorships listed below but may be added at a discounted rate.**

SPEAKER SPONSOR - \$3,000 (1 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
- Logo on symposium website, signage, program & FPA PS social media
- **1 complimentary representative, in addition to speaker**
- Exhibit table included

LUNCH SPONSOR - \$3,200 (ONE AVAILABLE)

- 5-minute sponsor spotlight during lunch to introduce your company
- Opportunity to provide company fliers on lunch tables for attendees
- Logo on symposium website, signage, program & FPA PS social media
- **2 complimentary registrations**
- Exhibit table included

BREAKFAST/COFFEE SPONSOR - \$3,000 (ONE AVAILABLE)

- Premier signage during breakfast hour
- Logo on symposium website, signage, program & FPA PS social media
- Opportunity to provide company fliers on breakfast tables for attendees
- **2 complimentary registrations**
- Exhibit table included

WINE DOWN SPONSOR - \$3,000 (1 AVAILABLE)

- 3-minutes to introduce your company at the end of the closing keynote session. Invite everyone to join the wine-down social hour!
- Logo on symposium website, signage, program & FPA PS social media
- Premier signage at Symposium reception
- **2 complimentary registrations**
- Exhibit table included

*GENERAL SESSION SPONSOR - \$2,000 (ONE AVAILABLE)

- **Introduce closing keynote speaker (Carl Richards)**
- 3-minute sponsor spotlight to introduce your company
- Logo on symposium website, signage, program & FPA PS social media
- Opportunity to provide company fliers on lunch tables for attendees
- **1 complimentary registration**
- **(Optional)** Discounted exhibit table – additional \$1000 add-on (\$1950 value)

*GIVEAWAY SPONSOR - \$2,000 (ONE AVAILABLE)

- 2-minutes to introduce your company and offerings before the drawings
- **1 complimentary registration**
- Logo on symposium website, signage, program & FPA PS social media
- **(Optional)** Discounted exhibit table – additional \$1000 add-on (\$1950 value)

*WIFI SPONSOR - \$1,500 (ONE AVAILABLE)

- Company logo all WIFI signage throughout the event (+ program)
- Logo on symposium website, signage, program & FPA PS social media
- **1 complimentary registration**
- **(Optional)** Discounted exhibit table – additional \$1000 add-on (\$1950 value)

SWEET & SALTY BREAK SPONSOR - \$1500 (ONE AVAILABLE)

- Company logo on Symposium website, signage, and program
- Premier signage during break
- **1 complimentary registration**
- **(Optional)** Discounted exhibit table – additional \$1000 add-on (\$1950 value)

*NAME BADGE SPONSOR - \$950 (ONE AVAILABLE)

- Logo and QR code on all attendee name badges
- **1 complimentary registration**
- **Does not include exhibit table**



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2026 SYMPOSIUM EXHIBITOR OPPORTUNITIES

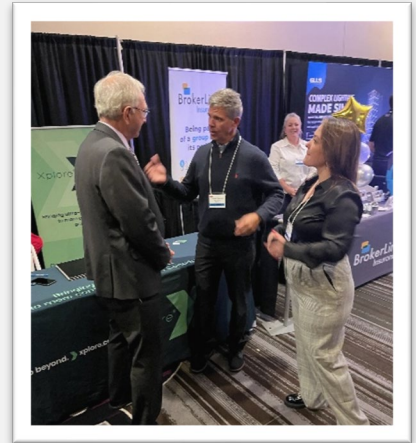
EXHIBIT TABLE SPONSORS BASELINE BENEFITS

- ☑ Two complimentary registrations
- ☑ Logo on Symposium website & marketing materials
- ☑ Chance to connect with 300+ financial advisors
- ☑ Access to attendee list
- ☑ Recognition during chapter update
- ☑ Invaluable networking opportunities during Symposium

SYMPOSIUM EXHIBIT TABLE SPONSOR - \$1,950

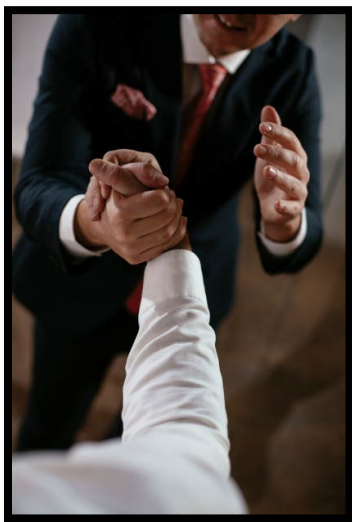
- One (1) exhibit table in the symposium exhibit area
- Recognition on event signage and promotional materials
- Listing on the event website with a link to your organization
- Two (2) complimentary symposium registrations
- Networking opportunities with attendees, speakers, and sponsors

(Certain symposium sponsors may add on an exhibit table at a discounted rate when you sign up – see benefit sections on pg. 5)



Partner With Us Today!

Visit our website or contact our office to learn more and get started.



We invite you to explore potential partnership opportunities with the FPA of Puget Sound. If you're interested in learning more about how we can collaborate, please contact our office at (206) 501-2161 or email us at info@fpapugetsound.org.

Please note that **all annual sponsorship packages are based on the 2026 calendar year**. This is a great opportunity to align your organization's goals with ours while gaining valuable exposure within the financial planning community.

Additionally, FPA of Puget Sound reserves the right to review and approve all sponsorship materials, including membership literature, correspondence, and advertisements, to ensure they meet our established policies and formatting guidelines.

We look forward to partnering with you and building meaningful connections that support our shared success.