



FINANCIAL PLANNING ASSOCIATION OF HAWAII

FPA of Hawaii is a regional chapter of the Financial Planning Association (FPA®), the national leadership and advocacy organization representing the financial planning community. Based in Denver, Colo., FPA® represents more than 25,000 members nationwide and is involved in all facets of providing financial planning services and works in alliance with academic leaders, legislative and regulatory bodies, financial services firms and consumer interest organizations.

Our primary aim is to be the community that fosters the value of financial planning and advances the financial planning profession. Whereas the public expects to experience a high level of confidence, trust and clarity in relationships with professionals trained in the distinct process and discipline of financial planning, it is essential that they obtain a commitment of professional care, quality and excellence in the services they receive.

OUR MISSION

FPA of Hawaii strengthens our community by building an organization of financial professionals dedicated to helping the members/our clients achieve their financial and personal objectives through the financial planning process. We enhance the growth and financial success of our members by providing educational and networking opportunities while upholding the highest standards of ethics and integrity.

PARTNER BENEFITS

SUPPORT

Contribute to advancing the financial planning profession in Hawaii.

RECOGNITION

Be recognized at our meetings, events and on our website for your valued partnership.

EXPOSURE

Showcase your firm and services to our professional community through speaking opportunities and visibility at events.

NETWORKING

Build lasting business relationships with Hawaii's financial planning professionals.

EXHIBITOR SPACE

Gain additional exposure at our Annual Symposium.

CHAPTER SNAPSHOT

TOTAL MEMBERS: 80

- **Professional Designations:** 80% CFP®, 15% ChFC, 5% CPA, 4% CFA
- **Licensing:** 51% Series 7, 9% Series 6, 35% Series 65 or 66
- **Insurance Licensing:** 53% Life Insurance, 45% Health Insurance, 39% Variable Annuity, 37% Fixed Annuity, 4% Property
- **Compensation Models:** 20% Fee Only, 5% Commission Only, 75% Both

Rates and Benefits

		Lehua (\$1,800)	Hibiscus (\$1,200)	Plumeria (\$800)
SYMPOSIUM SPONSOR LEVELS 40-50 ATTENDEES	PODIUM TIME	✓	✓	
	PASS TO ALL NETWORKING EVENTS	✓	✓	
	WEBSITE PRESENCE	✓	✓	
	COMPANY LOGO ON MATERIALS	✓	✓	
	ATTENDEE LIST	✓	✓	
	EXHIBIT BOOTH WITH SIGNAGE OF COMPANY LOGO	✓	✓	
	SOCIAL MEDIA RECOGNITION	✓	✓	
MONTHLY MEETINGS (JAN-OCT) 30-40 ATTENDEES	50 MINUTE CE PRESENTATION	1		
	10 MINUTE PODIUM TIME	1		1
	SUBMIT RESEARCH PAPERS TO MEMBERS	2		1
	ATTENDEE LIST	✓		✓
	PASS TO ALL NETWORKING EVENTS	✓		✓
	WEBSITE PRESENCE	✓		✓
	COMPANY LOGO ON MATERIALS	✓		✓
	SOCIAL MEDIA RECOGNITION	✓		✓

No limit on number of Lehua Partners. Limited number of Hibiscus (Symposium) and Plumeria (Lunch) Partners.

SPONSORSHIP OPPORTUNITIES

Sponsorship Level: Lehua Hibiscus Plumeria

Representative: _____ Title: _____

Phone: _____ Email: _____

Company: _____ Website: _____

Address: _____

Payment Method:

Check payable to FPA Hawaii -or- Complete online payment form and pay via PayPal

Mail to: Financial Planning Association of Hawaii, PO Box 63236, Ewa Beach, HI 96706