



FINANCIAL
PLANNING
ASSOCIATION

NORTHERN
CALIFORNIA

STRATEGIC PARTNERS PROGRAM



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916.443.4237



www.fpanc.org



Northern California Chapter Office
P.O. Box 583231
Elk Grove, CA, 95758



About the FPA



Strategic Reach

Partnering with the FPA of Northern California connects you with a highly engaged community of **137** financial professionals, over **70%** of whom hold the prestigious **CFP®** designation. Our members represent a range of specialties including financial planning, investment management, insurance, broker-dealer services, banking, law, and accounting.

Nationally, the FPA includes over **18,000** members across **80+** chapters, offering extended brand visibility and access to a respected network of financial experts. Sponsorship offers a unique opportunity to align with a trusted professional organization and build lasting connections with key decision-makers.

Our Mission

- ✓ Promote & Advocate for Financial Planning
- ✓ Provide Educational Resources
- ✓ Community Engagement
- ✓ Networking Opportunities
- ✓ Professional Career Advancement for FPs
- ✓ Create & Support Strategic Partnerships

Unlock the Power of Partnership



VISIBILITY

Amplify your brand presence through targeted exposure across events, digital platforms, and member communications.



ACCESS

Gain direct access to a curated network of credentialed financial professionals and key industry influencers.



ENGAGEMENT

Build meaningful relationships through interactive events, thought leadership opportunities, and collaborative initiatives.



CREDIBILITY

Enhance your brand's trust and authority by aligning with a respected, mission-driven professional association.

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Partner Benefits

BENEFITS (12 Months)

PLATINUM
(2 EACH)
\$4000

GOLD
(6 EACH)
\$1500

SILVER
(10 EACH)
\$1000

Website, Webinar & Email Marketing

Company logo displayed on FPA NorCal website homepage

Linked Logo

Linked Logo

Linked Logo

Company logo displayed on all FPA NorCal email marketing

Linked Logo

Linked Logo

Linked Logo

List of attendees who opt-in to hear from you to promote 2 Webinars/yr



Opportunity to send two marketing emails to the chapter database/yr



Quarterly Symposiums & Social Events

Complimentary Symposium Registrations

3

2

1

Promotion in all Symposium Marketing (email, program, signage)



Display Company marketing materials on exhibit tables



10 min Presentation Opportunity with Powerpoint (min 2 symposiums)



Opportunity to Introduce a Guest Speaker



Featured Strategic Partner for designated social activities (min 2-4)



EVENT SPONSOR*
\$500

- Sponsor a chapter event such as a membership social, special event or happy hour.
- Recognition in email marketing and at the event.

**Depending on availability (priority will be given to Platinum, Gold and Silver sponsors)*

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How to Apply

If you are interested in becoming a **Strategic Partner** of the FPA of Northern California, please complete the company information form (below) and payment form (next page) and submit it via email to holly@fpanc.org Receipt of payment will confirm your commitment.

***Please be sure to attach your company logo and professional headshot.**

Strategic Partner Level

Please indicate your choice below

☐

Platinum \$4,000

☐

Silver \$1,000

☐

Gold \$1,500

☐

Event Sponsor \$500



Company Information Form

Company Name:

Company Website Address:

Company Representative:

Company Mailing Address:

Phone Number:

Email Address:

Please tell us about your product, services and any special industry recognition:

Payment Options

Payment Form	
If paying by Check, please mail to:	FPA of Northern California P.O. Box 583231, Elk Grove, CA, 95758 Attn: Holly Wilkerson, Executive Director
If paying by Credit Card, select card type:	Visa Mastercard American Express Discover
First Name/Last Name:	
Billing Address:	
Phone Number:	
Email Address:	
Total Amount:	
Credit Card #	
Expiration Date	
Security Code	
Signature	

The tax ID for the FPA of Northern California is 94-3366058.

Please call if you need us to fax you a W9 form.

*Thank you for partnering with the FPA of Northern California!
We appreciate your sponsorship and look forward to an exciting year ahead!*