

*Partnership Prospectus*

# FPA SHIFT™ 2026

Elevate. Accelerate. Connect.



April 20-22, 2026  
Hilton La Jolla Torrey Pines  
La Jolla, California

# Join Us!



## FPA Retreat is now **FPA SHIFT™**.

Formerly known as FPA Retreat, this event focuses on transforming how planners practice. The event has always been on the cutting edge of new, critical thinking in financial planning, but is evolving into a space where financial planning professionals at every career stage can step back to reflect, question assumptions, and intentionally connect with their peers.

Attendees engage with thought leaders and practitioners who are redefining what's possible in financial planning. Sessions are designed to stretch beyond tactics and technique—exploring the ideas, questions, and approaches that spark real change in how planners practice and think about their work.

Attendees discover practical strategies they can actually implement. Not just theory. Not just inspiration. They learn from those who've tested new approaches and made them work.

Attendees build relationships through structured conversations designed for depth, not just for exchanging business cards. They connect with practice leaders, lifelong learners, and peers across all career stages who share their commitment to planning.

**250**

Total Attendance

**180**

Financial Planners

**70%**

CFP® Professionals

**30%**

Firm Owners

# The Opportunities

	 <b>Platinum Level</b> \$20,000	 <b>Gold Level</b> \$17,000	 <b>Silver Level</b> \$14,000	 <b>Bronze Level</b> \$8,500		
Partner Benefits						
Amenity or Event	Choose one Platinum level amenity.	Choose one Gold level amenity.	Choose one Silver level amenity.	Exhibit only.		
Preferred placement in the dedicated pre-meeting partner email to attendees	✓					
Company insertion in pre-event e-newsletter (sent by FPA to attendees)	✓				✓	
Flyer in conference mobile app virtual conference bag	✓				✓	✓
Pre-event attendee list (opt-in only—names, emails, and USPS addresses)	✓				✓	✓
Post-event attendee list (opt-in only—names, emails, and USPS addresses)	✓	✓	✓	✓		
Tabletop exhibit display	✓	✓	✓	✓		
Event registrations*	2	2	1	1		
Acknowledgement						
Pre-conference: <ul style="list-style-type: none"><li>Event website</li><li>Within marketing materials, as appropriate</li></ul>	✓	✓	✓	✓		
On-site: <ul style="list-style-type: none"><li>Signage</li><li>Walk-in slides</li><li>Verbal ‘thank you’ from podium by FPA leadership</li><li>Conference mobile app</li></ul>	✓	✓	✓	✓		

\*Additional registrations available for purchase.



# Platinum Level



## Closing Night Party (non-exclusive)

Help wrap up the event with a night of fun, featuring music, entertainment, food, and drinks. As a sponsor, you'll be recognized in signage, pre-conference promotions, and the mobile app, plus you'll deliver welcome remarks to kick off the festivities. Exclusive sponsorship and added brand exposure are also available.



## Breakfast, Lunch, or Dinner

Enhance the attendee dining experience by sponsoring a meal with branding options like table tents, chair drops, or a gift at each setting. Choose from unique touches like a signature dessert, centerpieces, up-lighting, logo projection, or buffet décor. With limited meal sponsorships available, this is an exclusive way to showcase your brand.



## Graphic Artist

Sponsor our talented graphic artist at FPA SHIFT™ and creatively showcase your brand! As the artist creatively captures the essence of the event in real-time, attendees will see your commitment. Your brand will be prominently featured alongside the artwork, ensuring a lasting impression.



## Surfboard Art

Support a creative, community-focused activity where attendees team up to paint a surfboard that will be donated to a local surf school. As the sponsor, your brand will be featured throughout the experience, showcasing your commitment to community impact.



## AI Sketchbot

Delight attendees with AI-powered, one-of-a-kind portraits featuring your branding on backdrops and custom logo sketches. This four-hour activation creates a memorable, personalized keepsake that keeps your brand front and center.

# Gold Level



## Puppy Play Time

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Bring joy to attendees with two hours of playtime featuring 5–10 adoptable puppies and adult dogs. As the sponsor, your brand will shine through signage and visibility at this irresistible, high-traffic activation.



## Goofy Golf

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Bring attendees together for a playful mix of putt-putt, games, and team challenges that encourage networking. You can showcase your brand as you host a hole-in-one activity, offer prizes, or engage participants with memorable branded touch points like drink tickets, branded bar, and eye-catching signage throughout the venue.



## Closing Reception

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Sponsor a closing reception to help attendees close out their FPA SHIFT™ experience. Branding options include a signature cocktail, custom napkins, signage, and drink tickets. Only one closing reception sponsorship is available, making this a unique opportunity to stand out.



## Massage Station

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Sponsor the event's popular massage station and attract attendees to your exhibit as they reserve their sessions. Capture contact information and showcase your brand through signage, tickets, and the therapist's t-shirt colors, creating a memorable, relaxing experience with your company.

# Silver Level



## Recharge Room

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Sponsor the Recharge Room to provide attendees with a serene escape for catching up on emails or enjoying quiet conversations. This thoughtfully designed area will feature electrical outlets and prominent signage, ensuring your brand is front and center as participants relax and recharge.



## FPA SHIFT Notebook

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Give attendees a valuable resource to take notes and collect contacts with a co-branded notebook featuring a full-page ad for your company. This sponsorship enhances their experience and allows you to showcase your offerings and engage directly with participants.



## Wi-Fi

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Maximize your exposure by creating and sharing the Wi-Fi password with attendees through eye-catching signage and a full-page ad in the event notebook. This visibility keeps attendees connected and reinforces your brand's presence throughout Retreat.



## Mobile App

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Enhance your brand visibility by guiding attendees through the event and connecting them with you! Your ad will be prominently displayed on the app's splash screen and as a sticky banner on the main screen, ensuring your message reaches attendees every time they engage with the app.



## FPA SHIFT™ Tote Bags

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Elevate your brand visibility by sponsoring the tote bags for attendees! This sponsorship offers a unique opportunity to make a lasting impression, as attendees will carry your brand long after the event concludes!

# Silver Level (cont.)



## Specialty Coffee Station

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Brew up connections by serving specialty coffees from your booth, creating a go-to spot for attendees to recharge and network. You'll leave a lasting impression with every cup.



## Local Hot Sauce Tasting and Competition

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Spice up the event with a two-hour local hot sauce tasting and friendly competition. Your brand will be featured throughout this lively, crowd-pleasing activation that brings attendees together for a fun, memorable experience.



## Ear Seeding

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Support a three-hour wellness activation where attendees receive tiny therapeutic ear seeds designed to promote relaxation, balance, and renewed energy. Your brand will be featured throughout this calming, high-interest offering.

A teal target icon with a small leaf-like shape at the top right.

# Extend Your Impact

FPA SHIFT™ presents a unique opportunity for you to connect, engage, and leave a lasting impression on the financial planning community. Beyond our core sponsorship packages, we're excited to offer a selection of opportunities to further amplify your brand.

Whether you're looking to tailor your sponsorship experience or enhance your visibility, these additional options can be combined with an existing package or selected à la carte to best suit your goals. Let's explore these exciting ways to make your mark on FPA SHIFT™ 2026.

## **Snack Breaks | \$7,200**

Delight attendees and energize their day by sponsoring a snack break filled with tasty treats. You'll fuel meaningful conversations and connections.

## **Hotel Key Cards | \$2,600**

Make a lasting impression by sponsoring branded hotel key cards that greet attendees whenever they enter their rooms. Your brand will be at the top of their minds throughout the event.

## **Room Drops\* | \$1,100**

Surprise and delight attendees with a personalized touch by sponsoring a hotel room drop. You'll create a memorable moment that keeps your brand front and center.

## **Charging Table | \$3,000**

Spark engagement at a sponsored charging table where attendees gather to recharge devices—and conversations. Your brand is front and center as connections power up.

## **Charging Locker | \$3,000**

Keep attendees powered up and connected with a sponsored charging locker that showcases your brand while giving them peace of mind. Your logo shines as they recharge and reengage.

## **Uber Rides | Ask for pricing and options**

Enhance the attendee experience by sponsoring Uber rides to and from the hotel for stress-free transportation or to explore San Diego before or after the event.

**Do you have other ideas that aren't listed?  
Let's explore how to make your ideas a reality!**





# Join Us!

Before FPA SHIFT™ 2026, FPA will host a partner webinar highlighting attendee demographics and ideas for effectively engaging attendees.

## Let's Talk!

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We look forward to having you join us for FPA SHIFT™ 2026 in La Jolla! We are here to help you maximize this one-of-a-kind opportunity and position you as a partner in planning for our members!



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