

The FPA is committed to attaining and maintaining the highest standards of professionalism in the financial planning industry. FPA members are those who commit to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve. They deliver advice using an objective, client-centered, ethical process. Financial Planning is a process not a product.

Our sponsors are our professional partners who align with our values and mission. We all work together for the benefit of our clients.

### **FPA of Northern California Sponsorship Mission Statement**

*Our sponsors are interesting companies building progressive, meaningful, and productive alliances with the Financial Planning Association.*

### **CHAPTER HIGHLIGHTS AND INFORMATION**

Our 200+ financial professional members represent a broad spectrum of experience, education, and specialties including financial planning, investment advisory and broker dealer services, as well as insurance and annuity products, banking, legal and accounting services. Our meeting attendance ranges from 40 to 60 professionals in any given month.

#### **Breakfast Meetings**

Breakfast meetings are held on the second Friday of every month at Rancho Cordova City Hall. Generally, each meeting offers CE credits on topics of interest by expert speakers. Registration begins at 7:30am with the meeting concluding by 10am. Member attendance is solid with about a quarter of our 200+ members attending.

#### **Happy Hour Mixers!**

We will be looking to offer our members and prospective members an opportunity to join us for a Happy Hour Mixer (or other similar type event) that will allow our members and sponsors alike to get to know each other in a more casual and informal setting. If you would like to sponsor one of these mixers, please let us know so we can see if we can't work something out!

### **SPONSORSHIP GUIDELINES**

#### **Sponsoring with the FPA of Northern California is a Good Investment**

Through the FPANC, you will have access to a focused market of the premier financial planning professionals within our large chapter area. Your participation in the Sponsorship Program provides you with the perfect exposure to saturate your precise target market, assuring your investment will grow in Northern California.

#### **How to Make the Most of Your Investment**

Attend every chapter meeting to be acknowledged as an FPA sponsor

- Arrive at the monthly meetings early to network with your target market
- Follow up with members you meet in person for an informational session
- Use the mailing labels to contact the entire membership
- Join a committee to become an active participant in the chapter
- Keep a well-stocked supply of fresh, current literature with the Executive Director
- Let the Director of Sponsorships know of other ways we can help you

### **Speaker Presentation Information**

Sponsorship does not guarantee the right to speak; in the past there has been pushback from the membership about feeling like the programming was a commercial or marketing platform. However, we do encourage our Sponsors to reach out to us with any potential speakers who can provide our members with educational content. Any potential featured speakers will require final approval as decided by the programming committee.

### **Termination Clause:**

In the event that fraud is discovered or a conviction occurs with a sponsor, the Financial Planning Association of Northern California reserves the right to terminate the current partnership agreement immediately. The sponsor will be notified in writing of this decision. No refunds will be awarded.

### **For more information, please contact:**

*Paul Meyerhoff, Co-Director of Sponsorship, (530) 758-2885, [paul@symphonyfp.com](mailto:paul@symphonyfp.com) or  
Lauri Cooper, Co-Director of Sponsorship, (916) 343-2211, [lcooper@rfslends.com](mailto:lcooper@rfslends.com)*

**Please see our PACKAGES 2017 for detailed info on packages available on the next page.**

## OUR RESOURCE PARTNER PACKAGES 2017

Benefit Highlights	Gold (10)	Silver (unlimited)
	\$ 1,500	\$ 1,000
<b>Sponsor spotlight at one chapter meeting, which includes:</b> <ul style="list-style-type: none"> <li>➤ Opportunity to have 10 minutes to speak before the attendees at one monthly meeting (power point optional)</li> <li>➤ Option to have handouts given to all attendees</li> <li>➤ One marketing email to the membership (if paid by 12/30/16)</li> </ul>	X	
Submit one article for quarterly newsletter (must be educational and not promotional)	X	
Free admission to attend and network with chapter members at monthly breakfast meetings	2 persons	1 person
One advertisement in the chapter's newsletter to 200+ members	¼ page	¼ page
Mailing labels for entire membership for marketing purposes (email option available)	X	X
Company logo in chapters quarterly newsletter and meeting announcement invites	X	X
Your company logo and contact info with a direct link to your website listed under "Sponsor" at www.fpanc.org	X	X
Your firm's name displayed prominently on tent cards, stand up promotion, and verbal acknowledgement at all meetings	X	X
Marketing material displayed on sponsorship table at every meeting	X	X
Discount pricing on newsletter advertisement	X	X
Opportunity to offer a discount to membership	X	X
Opportunity to raffle off a company gift at monthly meeting	X	X

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