



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 strategic partners are professionals who align with our values and mission. We all work together for the benefit of our clients.

### **FPA of Northern California Strategic Partnership Mission Statement:**

*Our strategic partners are companies interested in building progressive, meaningful, and productive alliances with the Financial Planning Association. We encourage our strategic partners to also be members or affiliate members of the FPA and our chapter and to become involved in committees, events and activities of the chapter.*

### **CHAPTER HIGHLIGHTS AND INFORMATION:**

Our 180+ 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, mortgage, real estate and accounting services. Our meeting attendance ranges from 40 to 70 professionals in any given month.

#### **Breakfast Meetings:**

Breakfast meetings are typically 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 networking until the meeting begins at 8:10am. The meeting concludes by 10am. Member attendance is solid with about a quarter of our 180+ members attending.

#### **Happy Hour Mixers & Study Groups:**

We will be looking to offer our members and prospective members an opportunity to join us for Happy Hour Mixers and Study Groups (or other similar type event) that will allow our members and strategic partners alike, to get to know each other in a more casual and informal setting. Opportunity to sponsor these events are limited and available under our "Additional Sponsorship Opportunities" section.

### **STRATEGIC PARTNERSHIP GUIDELINES:**

#### **Partnering 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 Strategic Partnership Program provides you with the perfect exposure to saturate your precise target market, assuring your investment will grow in Northern California. Strategic Partnership/Sponsorship packages are highly valued in our chapter as there are a limited number available in the Gold category (11). First priority of sponsorships is given to member companies/persons. Membership can be obtained online at [www.fpanc.org](http://www.fpanc.org) – click on JOIN. All sponsors are encouraged to be a member as one of our goals of our chapter is to grow our membership.

### **Limited Availability in Each Category:**

To add value, our partnership packages are limited to 3 sponsors per industry category, in each Partnership level as determined by the Board of Directors. Examples are: Wholesaler, TPA, CPA, Insurance, Real Estate, Mortgages, and Attorneys. Gold Level is limited to a total of 11 companies each year. Silver is not restricted in number, but no more than 3 partners per category will be allowed. Returning Member sponsors will have first opportunity to select their sponsorship level. All Renewal Sponsorship Commitments must be received by 12-7-2018 or the sponsorship will be available to new sponsors. Payment must be received by 12-7-2018.

### **New Strategic Partners:**

Our board highly encourages all members and sponsors to suggest and introduce new strategic partners. New Strategic Partners will be provided the opportunity to join for the 2018 year after 12-8-18. Complete the application and submit full payment to holly@fpanc.org.

### **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 Strategic Partnerships know of other ways we can help you

### **Speaker Presentation Information:**

Partnership 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 Strategic Partners to reach out to the Board 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 with approval from the Board.

### **Termination Clause:**

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

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

David Laut, CFP®, Director of Strategic Partners, (916) 846-7780, [d.laut@spectrumwealthinc.com](mailto:d.laut@spectrumwealthinc.com)

Please see our 2019 PACKAGES for detailed info on packages available on the next page

## OUR STRATEGIC PARTNER PACKAGES 2019

Benefit Highlights	Gold (8)	Silver (unlimited)
	<b>\$2,000</b>	<b>\$1,300</b>
Submit one article for quarterly newsletter (educational)	X	
Conduct the meeting highlight video recap – Interview the speaker for the video recap to be posted to website	X	
Opportunity to host additional chapter events: see additional menu	X	
Sponsor spotlight at <b>ONE</b> chapter meeting, which includes: <ul style="list-style-type: none"> <li>➤ Opportunity to have 7 minutes to speak before the attendees at one monthly meeting (PowerPoint optional)</li> <li>➤ Option to have handouts given to all attendees</li> <li>➤ One follow-up marketing email to the membership</li> </ul>	X	
Free admission to attend and network with chapter members at monthly breakfast meetings – (offsite lunch and mixers not included)	2 persons	1 person
Opportunity to raffle off a company gift at monthly meeting	X	
Company logo in chapter's quarterly newsletter and meeting announcement invites	X	X
Mailing labels for entire membership for marketing purposes (email option available)	X	X
Your company logo and contact info with a direct link to your website listed under "Strategic Partners" at <a href="http://www.fpanc.org">www.fpanc.org</a>	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
Opportunity to offer a discount to membership	X	X
One advertisement in the chapter's newsletter to 200+ members	½ page	¼ page

**For Gold Partners – Additional Partnership Opportunities:**

- \* Annual Past Presidents/Strategic Partners Dinner (limited to 2)
- \* Host a “Study Group” event - Work with President to develop a scenario that would include your product/service. Location/Time TBD (2 available)
- \* Host a Quarterly Members Mixer – Pick the location/date/time – provide appetizers – to be approved by the Board. Cost is TBD based on event location, etc.
- \*Partner on our NexGen Event(s) – Date(s) TBD – First opportunity to choose from event sponsorships available with a 30% discount from advertised sponsorship packages.

**For more information, please contact:**

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