

LETTER OF AGREEMENT FOR YEAR 2008

The undersigned party (herein after “Partner”) hereby applies to become a Partner of the Financial Planning Association of Minnesota chapter (hereinafter the FPA of MN) under the terms of the “Partnership Program” (hereinafter “Program”) for the 2008 sponsorship year. If Partner is accepted to the Program, Partner further agrees to a partnership contract term of January 1st through December 31st, payable in advance.

The FPA of MN strives to develop quality partnership relationships with sponsors who have a long-term interest in supporting the financial planning industry. Partner understands that Program has the ultimate right to refuse acceptance to any party without recourse in its pursuit of that goal. All benefits are offered with the understanding that the Partner assumes the responsibility to make payment in time to allow benefits to be used within calendar year.

Platinum Partnership Benefits : *(limited to ten)* \$5,000

All Gold and Silver Partnership Benefits, **plus:**

- Exclusive rights to company/display booth and ten minute presentation at one monthly meeting
- Opportunity to display company brochures at all monthly chapter meetings
- Feature article in one monthly newsletter - provide text and logo or photo, if desired
- Full page ad in monthly newsletter - provide a PDF file, limited to 1 page
- Golf Tournament sponsorship and signage at a hole; anticipated attendance of 100
- Golf Tournament representative at a hole, available to Plat Partners at no charge
- Exclusive representation at any social gatherings of FPA members and their families
- **Bonus for Prompt Payment by January 31st:** Renewing Platinum Partners receive one full-page or two half-page feature article(s) per year in our monthly newsletter; or a 10% discount as a prompt payment reward. The newsletter is sent to approximately 1200 individuals per month and is posted electronically on our website for two years.
- **Symposium Speaker Fee Discount:** Platinum Partners will receive a 15% discount for a breakout speaker, panel speaker, main speaker, or keynote speaker.

Gold Partnership Benefits: \$3,750

All Silver Partnership Benefits, **plus:**

- Firm’s name and logo on website (www.fpamn.org) with link back to partner’s home page
- Golf Tournament sponsorship and signage at a hole; anticipated attendance of 100
- If you are interested in having a representative at a hole, “Hole In One” sponsorships are available at \$500
- Full page ad in the FPA of MN Directory; directory placed in Members’ Only section of website
- Electronic spreadsheet of the entire Minnesota membership. Contact is limited to once every quarter and there shall be no contact by email, without obtaining individualized permission from recipients in advance.
- Access to the Members Only directory with names, addresses and top three specialty listings
- Exclusive attendance at the New Member Reception(s)
- Two mailings of educational or company profile sheet to the entire Minnesota membership per year - provide a PDF file, limited to one full 8 1/2 x 11 page each
- Special recognition at annual Symposium through “Minute to Shine” door prize give-away

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Gold Partnership Benefits Continued...

- Constant recognition as a partner in all newsletters and at FPA of MN conferences
- **Bonus for Prompt Payment by January 31st:** All Gold Partners are entitled to a 5% discount of \$188.
- **Symposium Speaker Fee Discount:** Gold Partners will receive a 10% discount for a breakout speaker, panel speaker, main speaker or keynote speaker.

Silver Partnership Benefits: \$2,750

Partnership Benefits include:

- Annual pass to all regular monthly Chapter meetings, held the third Tuesday of the month (except August and October); anticipated attendance of 125-175. To RSVP, call 763-781-1212.
- Participation for one in Golf Tournament at no charge, plus signage in clubhouse; anticipated attendance of 100
- If you are interested in having a representative at a hole, Hole In One sponsorships are available starting at \$750
- Dinner at Golf Tournament
- Exhibit booth at our annual Symposium, anticipated attendance of 300 financial planning professionals
- Recognition in the monthly newsletter as a supporting sponsor, sent to approximately 1200 individuals per month and posted electronically on our website for two years.
- Name Recognition in the Symposium program schedule, mailed to approximately 2000 financial professionals
- Monthly promotion on the local FPA of MN website: <http://www.fpamn.org/partnerships/partner.html>
- Company recognition through promotion of Symposium Exhibitor Bingo and Exhibitor Door Prize Announcements
- Company insert in Symposium attendees' notebook
- Pre- and post-attendee Symposium list; limited to one mailing each
- Complimentary Symposium conference manual, including conference attendee list
- Two Symposium conference registrations, including opportunity to earn CFP®, MN CE, WICE and CPE credits
- Meals and snacks throughout the Symposium
- **Bonus for Prompt Payment by January 31st:** All Silver Partners are entitled to a one-quarter page ad in one monthly newsletter, with payment received by January 31st.
- **Symposium Speaker Fee Discount:** Silver Partners will receive a 5% discount for a panel speaker, speaker, or keynote speaker.

Speaking Opportunities at Annual Symposium

You must be a Platinum, Gold, or Silver Partner to take advantage of these offerings.

- Keynote Luncheon Speaker \$3,000
- Main Speaker (One hour) \$2,500
- Panel Speaker (20-30 minutes) \$2,000
- Breakout Speaker \$1,500
- Continental Breakfast Partner \$500 ea
- Break Partner \$350 ea

Partner Discounts from above speaking rates at annual symposium:

- Platinum Partners 15% off
- Gold Partners 10% off
- Silver Partners 5% off

RESPONSIBILITIES OF PARTNERS

Responsibilities of Partners will include:

- Prompt payment of annual partnership fee. Refer to Benefits at a Glance sheet for Prompt Payment Bonuses.
- Active participation in the education of our membership on your company’s products and services.
- Assume the responsibility to take advantage of benefits to be used within calendar year.
- Obtain approval from FPA of MN for all bulk correspondence sent to FPA membership. *Bulk correspondence is defined as a same date mailing of identical pieces of correspondence to more than five members.*

FPA of Minnesota may:

- At its sole discretion, accept, deny, non-renew, and/or terminate Partner.
- Schedule, reschedule, or cancel, at its discretion, meeting dates or presentations and will not be responsible for any Partner liabilities, financial or otherwise, arising from such actions.
- Change the Partnership fees and/or benefits and/or prompt payment discount at renewal within a 30 day notice.

Partner agrees to the above terms, and hereby applies for a sponsorship with the FPA of MN in the Program as a:

- Platinum Partner
- Gold Partner
- Silver Partner

Entered into this _____ day of _____, 200__.

Signed by:

Signature

Printed Name

Company Name

Email Address

Address

City

State

Zip

Toll Free Number

Phone

Fax

BENEFIT SELECTION SHEET

All publicity should list our company name as:

PLATINUM ONLY:

My monthly meeting program sponsorship preference is (rank top three choices):

_____ January 15 - Fin'l Planning for Non-Traditional and Unmarried Couples, JT Hatfield Smith

_____ February 19 - Economic Overview, Gary Stern

_____ March 18 - Real Estate-Related Panel

_____ April 15 - Greatest Estate, Wealth and Asset Protection Planning Tips

_____ May 20 -

_____ June 17 -

_____ July 15 -

_____ September 16 -

_____ November 18 -

_____ December 16 -

*Tentative Schedule for 2008 - See Website for Updates:
<http://www.fpamn.org/members/calendar.html>*

*Symposium 2008 will be held
 October 14-15*

I am submitting 50 company brochures for display at the marketing table during the monthly meetings.
 To be mailed to: 3900 Main Street NE, Columbia Heights, MN 55421

I have submitted payment to qualify for the Prompt Payment Discount - by January 31st. I'd like:

_____ One full-page feature article in a monthly newsletter, or,

_____ Two half-page feature articles in monthly newsletters, or,

_____ A 10% discount off my \$5,000 fee (\$500)

PLATINUM & GOLD:

I would like to take advantage of the Symposium speaker discount. I am interested in:

_____ Platinum Partners - 15% Discount _____ Silver Partners - 5% Discount

_____ Gold Partners - 10% Discount

Please call me at: _____

My top four month choices for newsletter inserts are:

_____ January	_____ April	_____ July	_____ October
_____ February	_____ May	_____ August	_____ November
_____ March	_____ June	_____ September	_____ December

Our company website address is: _____

I have emailed our company logo to you at: office@fpamn.org (tif, gif, or jpg preferred)

I have emailed our full-page ad for the directory (PDF format)

Please send me the membership database in _____ (indicate month).

GOLD:

I have submitted payment to qualify for the Prompt Payment Discount - by January 31st. I'd like:

_____ One half-page ad in monthly newsletter in _____ (indicate month), or,

_____ A 5% discount off my \$3,750 fee (\$188)

SILVER:

I have submitted payment to qualify for the Prompt Payment Discount - by January 31st.
 I would like to place a one-quarter page ad in the monthly newsletter in
 _____ (indicate month).

ALL:

Yes, we'd like to send one representative to participate in the Golf Outing at no charge. Contact me with the details once the date has been set. Additional partners may golf at the Early Bird Member rate.