

Don't wait too long to take advantage of your exposure and partner benefits. We'll sell out fast again this year.

Minnesota Chapter
 3900 Main Street N.E.
 Minneapolis, MN 55421
 Office (763) 781-1212
 Fax (763) 226-2393

Web site: www.fpamn.org

LETTER OF AGREEMENT FOR YEAR 2012

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 2012 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 - No Refunds)* \$5,500

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

- Exclusive rights to company/display booth and ten minute presentation at one monthly meeting
- Attendance at one monthly board meeting; to occur in the same month as your hosted chapter 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 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 31, 2012:** Renewing Platinum Partners receive one full-page or two half-page feature article(s) per year in our monthly newsletter; or a 10% discount (\$550) as a prompt payment reward. The newsletter is sent to approximately 3,500 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. The 2012 speakers are planned between October 2011 - March, 2012.

Gold Partnership Benefits: *(No Refunds)* \$4,000

All Silver and Bronze 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, tee sponsorships are available at \$500
- Full page ad in the FPA of MN Directory; directory placed in Members’ Only section of website
- Spreadsheet of the entire Minnesota membership (mailing addresses). 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 inserts of educational or company profile information to the entire Minnesota membership per year - provide a PDF file, limited to one full 8 1/2 x 11 page each time
- Special recognition at annual Symposium through “Minute to Shine” door prize give-away
- Constant recognition as a partner in all newsletters and at FPA of MN events and conferences
- **Bonus for Prompt Payment by January 31, 2012:** All Gold Partners are entitled to a 5% discount of \$200.

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Gold Partnership Benefits Continued...

- **Symposium Speaker Fee Discount:** Gold Partners will receive a 10% discount for a breakout speaker, panel speaker, main speaker or keynote speaker. The 2012 speakers are planned between October 2011 - March 2012.

Silver Partnership Benefits: *(No Refunds)* \$3,000

All Bronze Partnership Benefits, **plus:**

- Golf and Bocce Ball Outing - If you are interested in having a representative at a hole, tee sponsorships are available starting at \$625
- Exhibit booth at our annual Symposium, anticipated attendance of 350 financial planning professionals. Dates for 2012 are set for October 8-9, 2012.
- Name Recognition in Symposium schedule, posted to web site and included in newsletters
- Company recognition through promotion in Symposium Attendee Notebooks and Exhibitor Door Prize Announcements
- Company insert in Symposium attendees' notebook
- Pre- and post-attendee Symposium list; limited to one mailing each
- Complimentary Symposium attendee notebook, including conference attendee list
- Two Symposium conference registrations, including opportunity to earn CFP®, MN CE, WICE, NASBA/CPE, CIMA, and some CLE credits
- Meals and snacks throughout the Symposium
- **Bonus for Prompt Payment by January 31, 2012:** 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.

Bronze Partnership Benefits: *(No Refunds)* \$1,000

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 150-225. To RSVP, call 763-781-1212.
- Recognition in the monthly newsletter as a supporting partner along with email link, sent to approximately 3,500 individuals per month and posted electronically on our website for two years.
- Monthly promotion on the local FPA of MN website: <http://www.fpamn.org/partnerships/partner.html>
- Participation for one in Golf and Bocce Ball Tournament, plus signage in clubhouse; anticipated attendance of 100
- If you are interested in having a representative at a hole, tee sponsorships are available starting at \$750
- **Bonus for Prompt Payment by January 31, 2012:** All Silver Partners are entitled to a one-sixth page ad in one monthly newsletter, with payment received by January 31st.
- **Symposium Speaker Fee Discount:** Bronze Partners will receive a 2.5% discount for a panel speaker, speaker, or keynote speaker.

(Note: this level does NOT include the Annual Symposium, but receives the member rate to attend; a \$75 savings.)

Speaking & Sponsor Opportunities at Annual Symposium

You must be a Platinum, Gold, Silver, or Bronze 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
- Breakfast, Lunch or Break Sponsor \$250 ea
- First Evening Reception Sponsor \$1,000

Partners receive a discount on the Speaking Opportunities listed above:

Platinum Partners - 15% off • Gold Partners - 10% off • Silver Partners - 5% off • Bronze Partners - 2.5% off

Speaking opportunities are subject to the normal review of the Symposium Committee. If interested, please complete the Call for Speakers form located on the web site: <http://www.fpamn.org/members/committees.html>. Speakers are selected on an average ten months before the event.

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.
- Only Platinum Partners have permission to mail correspondence to FPA membership. Request data two weeks prior to mailing date.

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 partnership with the FPA of MN as a:

- Platinum Partner
- Gold Partner
- Silver Partner
- Bronze Partner

Methods of Payment:
Check or Credit Card:
 Visa / MasterCard / American Express
<http://www.fpamn.org/store/Shop-FPA.html>

Entered into this _____ day of _____, 201__.

Signed by:

 Signature

 Printed Name

 Company Name

 Email Address

 Address City State Zip

 Toll Free Number Phone Fax

Return pages 3 & 4 to FPA MN

BENEFIT SELECTION SHEET

All publicity should list our company name as:

PLATINUM ONLY:	<p>My monthly meeting sponsorship preference is (rank 3 choices). Your board attendance will be the same month.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 33%;">_____ January 17</td> <td style="width: 33%;">_____ June 19</td> <td style="width: 33%;"></td> </tr> <tr> <td>_____ February 21</td> <td>_____ July 17</td> <td></td> </tr> <tr> <td>_____ March 20</td> <td>_____ September 18</td> <td></td> </tr> <tr> <td>_____ April 17</td> <td>_____ November 20</td> <td></td> </tr> <tr> <td>_____ May 15</td> <td>_____ December 18</td> <td></td> </tr> </table> <p style="text-align: right; color: red;">Tentative Schedule for 2012 See Website for Updates: http://www.fpamn.org/members/calendar.html Symposium 2012 will be held October 8-9</p>		_____ January 17	_____ June 19		_____ February 21	_____ July 17		_____ March 20	_____ September 18		_____ April 17	_____ November 20		_____ May 15	_____ December 18	
_____ January 17	_____ June 19																
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_____ April 17	_____ November 20																
_____ May 15	_____ December 18																
	<p><input type="checkbox"/> I am submitting one inch of company brochures for display at the marketing table during the monthly meetings. Mail to: 3900 Main Street NE, Columbia Heights, MN 55421</p>																
	<p><input type="checkbox"/> I have submitted payment to qualify for the Prompt Payment Discount - <u>by January 31, 2012</u>. 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 \$5,500 fee (\$550)</p>																
PLATINUM & GOLD:	<p><input type="checkbox"/> I would like to take advantage of the Symposium speaker discount. I am interested in: ___ Platinum-15% Discount ___ Gold-10% Discount ___ Silver-5% Discount</p> <p>Please call me at: _____</p> <p>My top four month choices for newsletter inserts are:</p> <table style="width: 100%; border: none;"> <tr> <td>_____ January</td> <td>_____ April</td> <td>_____ July</td> <td>_____ October</td> </tr> <tr> <td>_____ February</td> <td>_____ May</td> <td>_____ August</td> <td>_____ November</td> </tr> <tr> <td>_____ March</td> <td>_____ June</td> <td>_____ September</td> <td>_____ December</td> </tr> </table>	_____ January	_____ April	_____ July	_____ October	_____ February	_____ May	_____ August	_____ November	_____ March	_____ June	_____ September	_____ December	<p><input type="checkbox"/> Sign me up for the Minute to Shine at Symposium. I'll bring a door prize valued at \$50 or above.</p>			
_____ January	_____ April	_____ July	_____ October														
_____ February	_____ May	_____ August	_____ November														
_____ March	_____ June	_____ September	_____ December														
	<p>Our company website address is: _____</p> <p>The partner to be listed in the newsletters is: _____</p> <p><input type="checkbox"/> I have emailed our company logo to you at: office@fpamn.org (tif, gif, or jpg preferred)</p> <p><input type="checkbox"/> I have emailed our full-page ad for the member directory (PDF format).</p> <p><input type="checkbox"/> Please send me the membership database in _____ (indicate month).</p>																
GOLD:	<p><input type="checkbox"/> I have submitted payment to qualify for the Prompt Payment Discount - <u>by January 31, 2012</u>. I'd like: _____ One half-page ad in monthly newsletter in _____ (indicate month), or, _____ A 5% discount off my \$4,000 fee (\$200)</p>																
SILVER:	<p><input type="checkbox"/> I have submitted payment to qualify for the Prompt Payment Discount - <u>by January 31, 2012</u>. I would like to place a one-quarter page ad in the monthly newsletter in _____ (indicate month).</p>																
ALL:	<p><input type="checkbox"/> Yes, we'd like to send one representative to participate in the August Golf/Bocce Ball Outing at no charge. Contact me with the details once the date is set. Additional partners may golf at the Early Bird Member rate.</p> <p><input type="checkbox"/> We'd like to sponsor a Hole in One prize at the Golf/Bocce Ball Outing. Call me.</p> <p><input type="checkbox"/> We'd like to provide a raffle prize for the Golf/Bocce Ball Outing. Call me.</p> <p><input type="checkbox"/> We'd like to provide a contribution to the Golf/Bocce Ball goody bag (memo pads, pens, tees, etc.) Call me.</p> <p><input type="checkbox"/> We'd like to sponsor either the Breakfast, Lunch, or Dessert Break at the 2012 Symposium. Call me.</p> <p><input type="checkbox"/> We'd like to sponsor the First Evening Networking Reception at the 2012 Symposium. Call me.</p>																