



Administrative Offices Located at
 3900 Main Street NE
 Columbia Heights, MN 55421
 Office (763) 781-1212
 Email: office@fpamn.org
 Web site: <http://www.FPAMN.org/>

LETTER OF AGREEMENT FOR YEAR 2014

The undersigned hereby applies to become a Partner of the Financial Planning Association of Minnesota chapter (FPA of MN) under the terms of the Partnership Program for the 2014 sponsorship year. If Partner is accepted, 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 FPA of MN 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 use benefits within the calendar year.

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. No refunds or carry-overs are given.
- 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 with a 30 day notice.

Partner agrees to the above terms, and hereby applies for a partnership with the FPA of MN:

Entered into this _____ day of _____, 201__.

Signed by:

 Signature Printed Name

 Company Name - as you want it listed on the website and in newsletters

The partner to be listed in the newsletters is: _____

 Email Address Website

 Address City State Zip

 Toll Free Number Phone Fax

BENEFIT SELECTION SHEET

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| <p>Section A - Sign Me Up for 2014 Partnership:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Platinum Partner - \$5,500 <input type="checkbox"/> Gold Partner - \$4,000 <input type="checkbox"/> Silver Partner - \$3,000 <input type="checkbox"/> Bronze Partner - \$1,000 <p style="text-align: center;">Sub-Total Section A: \$ _____</p> | <p>Sign Me Up for Extra Exposure Opportunities:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Golf and Bocce Ball Outing Upgrades as noted below <input type="checkbox"/> Annual Symposium Upgrades as noted below <input type="checkbox"/> Monthly Chapter Meeting Door Prize |
| <p>Section B - Golf & Bocce Ball Outing Upgrades:</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1st Place Team Sponsor - \$500 <input type="checkbox"/> 2nd Place Team Sponsor - \$250 <input type="checkbox"/> 1st Place Bocce Ball Winner - \$200 <input type="checkbox"/> 2nd Place Bocce Ball Winner - \$100 <input type="checkbox"/> Golf Clinic - \$200 <input type="checkbox"/> Bocce Ball Tourney Sponsor - \$200 <input type="checkbox"/> Putting Contest - \$500 <input type="checkbox"/> Straightest Drive Men - \$250 <input type="checkbox"/> Straightest Drive Women - \$250 <input type="checkbox"/> Closest to Hole Men - \$250 <input type="checkbox"/> Closest to Hole Women - \$250 <input type="checkbox"/> Longest Putt Men - \$250 <input type="checkbox"/> Longest Putt Women - \$250 <input type="checkbox"/> Hole in One Grand Prize \$10K Cash/Car - \$750 <input type="checkbox"/> Hole in One 1st Place Prize - \$500 <input type="checkbox"/> Hole in One 2nd Place Prize - \$500 <input type="checkbox"/> Hole in One 3rd Place Prize - \$500 <input type="checkbox"/> Sign Sponsor - \$750 <input type="checkbox"/> Lunch Sponsor - \$500 (3 available) <input type="checkbox"/> Banquet Sponsor - \$750 (2 available) <input type="checkbox"/> Driving Range - \$300 <input type="checkbox"/> Beverage Cart - \$500 (2 available) <input type="checkbox"/> GPS Cart Ad - \$100 (18 available) <input type="checkbox"/> Raffle Prizes <input type="checkbox"/> Cloth Bags for Give-Away Donations <input type="checkbox"/> Goody Bag Donations <input type="checkbox"/> Plats Only: Out at Tee Opportunity (Free) <input type="checkbox"/> Others: Out at Tee Opportunity – from \$250 <p style="text-align: center;">Sub-Total Section B: \$ _____</p> | <p>PLATINUM LEVEL:</p> <p>Top 4 monthly meeting choices for hosting:</p> <ol style="list-style-type: none"> 1. _____ 2. _____ 3. _____ 4. _____ <p>Submit one inch (up to 50) of company brochures for display at the chapter meetings. Mail to: 3900 Main Street NE, Columbia Heights, MN 55421</p> <p>PLATINUM & GOLD LEVEL:</p> <p>Top 4 monthly choices for newsletter inserts:</p> <ol style="list-style-type: none"> 1. _____ 2. _____ 3. _____ 4. _____ <p>These are due by the 22nd of the preceding month.</p> <p>TO-DO's for PLATS & GOLDS:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Email logo for website/promotion. <input type="checkbox"/> Email PDF for Member Directory. <input type="checkbox"/> Email PDF for Newsletter insertion. <input type="checkbox"/> Request database for up to 4 mailings. <p>Watch for your Marketing Calendar which will highlight tasks and dates for the entire year. It will also include the dates and times for the three Partnership Calls.</p> |
| <p>Section C - Annual Symposium Upgrades:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Breakfast, October 20th - \$250 <input type="checkbox"/> Breakfast, October 21st - \$250 <input type="checkbox"/> Lunch, October 20th - \$250 <input type="checkbox"/> Lunch, October 21st - \$250 <input type="checkbox"/> Cookie Break, October 20th - \$250 <input type="checkbox"/> Cookie Break, October 21st - \$250 <input type="checkbox"/> Beverage Station, October 20th - \$250 <input type="checkbox"/> Beverage Station, October 21st - \$250 <input type="checkbox"/> Wi-Fi Sponsor - \$850 per day <input type="checkbox"/> Reception, October 20th - \$500 (3 available) <p style="text-align: center;">Sub-Total Section C: \$ _____</p> | <p>I have submitted payment to qualify for the Prompt Payment Discount - <u>by January 31, 2014.</u></p> <p>Plats: Deduct \$550 or add full page ad Golds: Deduct \$200 or add half page ad Silvers: Free quarter-page ad</p> <p style="text-align: center;">Total Amount Due: \$ _____</p> <p>Visa, MasterCard or American Express accepted.</p> <p><input type="checkbox"/> I am ready to pay with a credit card. Call me.</p> |
| <p>Total Amounts from Sections A, B, & C:</p> <p style="text-align: center;">\$ _____</p> | <p>Return to the FPA of Minnesota by Email: office@fpamn.org Fax: 763-226-2393 Or Mail: Address on Page 1</p> |