



The community that brings together those who deliver, support and benefit from financial planning.

BENEFITS OF PARTNERING WITH THE FPA OF MN

Our association is supported by a number of exceptional partners like you who help offset the cost of delivering benefits. You are helping to lead FPA's message of building the community of the financial planning profession, with your commitment to the association, our mission and our members.

Visit our website at: www.fpamn.org for information on our mission and vision, as well as detailed information on committee strategies and planned activities.

QuickFACTS

The FPA of Minnesota has more than 820 financial professional members, representing a broad spectrum of specialties including financial planning, broker dealer services, insurance/annuities, mutual funds, banks/thrifts/trust, law, investment management and accounting. The entire FPA membership totals nearly 24,000.

- FACT** Average member age = 49 years old
- FACT** 72% of members have ten plus years of professional experience
- FACT** 65% of members are CFPs
12% are ChFCs
11% are CLUs or CPAs
- FACT** 74% have at least a Bachelor's
23% have a Master's
- FACT** Top financial services provided:
77% Retirement planning
72% Financial planning
70% Investment/Asset mgmt.
69% Estate planning
- FACT** Long-term involvement equals lasting relationships.

"FPA MINNESOTA MEMBERS ARE A HIGHLY TARGETED MARKET FOR YOUR PRODUCT OR SERVICE."

The Platinum and Gold packages offer you an excellent opportunity to be a valued partner of our organization and to reap the rewards of establishing a strong relationship with the premier financial planning organization in the state and one of the top FPA chapters in the country.

Partner Benefits

✓ RECOGNITION

Visibility as a FPA of Minnesota partner throughout the year at all FPA events: 10 monthly meetings, New Member Receptions and Orientations, Golf/Bocce Ball Outing, Symposium, and in all newsletters.

✓ EXPOSURE

To our membership on a consistent basis. The financial professionals you'll meet through the FPA of MN Chapter can help you build long-term business relationships.

✓ EXHIBIT TABLE

Members are continually looking for information on new products and services to meet their clients' needs. Display your materials at the monthly chapter meetings to a targeted audience.

✓ OPPORTUNITIES

You have the opportunity to meet and share your message with attendees at the chapter meetings. It's an excellent time to collect business cards for follow-up marketing.

✓ EXHIBITOR SPACE

Exhibitor space at our annual two-day symposium. Anticipated attendance of 600 participants and 70 partners (limit of 45 companies and 4 non-profits.)

The Financial Planning Association of Minnesota Partnerships are available on a first-come, first-served basis. To reserve your partnership, call:
Bonnie Stanley, Executive Director
763-781-1212
Michelle Marquez, Partnership Director 651-605-2747

Platinum Partner

Platinum Partners will have a distinct advantage over their competition. **In addition to the Gold, Silver and Bronze benefits**, you will receive:

- Exclusive rights to company display/booth at one monthly meeting (located by registration and greeter area) & 10 minute presentation
- Up to 3 page article following host month
- Attend 1 monthly board meeting with a 10 minute presentation
- One feature article in monthly newsletter
- Golf Tournament rep at a hole
- Display handouts at all ten chapter meetings
- One full page PDF to membership
- Exclusive representation at social gatherings of FPA members and their families

\$5,500 - Limited to 10 partners

Platinum Partners entitled to one full page or two half page ads in monthly newsletter or 10% discount (\$550) as prompt payment reward, with fees received by January 31, 2014.

Gold Partner

As a Gold Partner, you will have the opportunity to interact with our membership. **In addition to the Silver and Bronze benefits**, you will receive:

- Minute to Shine at annual Symposium
- Firm's name and logo on our website
- Welcomed attendance at New Member Receptions and Orientations
- Golf Tournament signage at hole; anticipated attendance of 100
- Full page ad in the FPA Member Directory
- Spreadsheet of the entire Minnesota membership (mailing addresses)
- Two full-page PDFs to membership
- A copy of the directory with planners' names, addresses and specialties

Cost - \$4,000

Gold Partners entitled to 5% prompt payment discount (\$200) or one half-page ad in monthly newsletter, with fees received by January 31, 2014.

Silver Partner

As a Silver Partner, you will have the opportunity to interact with our membership. **In addition to the Bronze benefits**, you will receive:

- Annual Symposium - see benefits listed below

Cost - \$3,000

Silver Partners are entitled to one quarter-page ad in monthly newsletter, with fees received by January 31, 2014.

Annual Symposium

The Symposium is a two-day event held annually at the Minneapolis Convention Center. In 2014, it will be held on **October 20th and 21st**. Average attendance - 600 financial professionals. We limit our partner openings to 45 companies and 4 non-profits to keep the member/exhibitor ratio high.

Sponsorship includes a 8' x 10' exhibitor booth, spreadsheet of attendees (mailing addresses) and the opportunity to meet attendees one on one. In addition to exposure at the conference, your company will receive the following benefits:

- Recognition in the FPA of MN monthly newsletter as a supporting sponsor (3000+ emailed)
- Name recognition in the Symposium schedule (3000+ emailed to financial professionals)
- Annual promotion on the local FPA of MN website: www.fpamn.org
- Pre- and Post-attendee mailing list
- Company recognition through promotion in Symposium Attendee Notebook and Exhibitor Door Prize
- Company insert in 650 attendee notebooks
- Complimentary conference notebook, including conference attendee mailing list
- Two conference registrations, including up to 13 CFP®, MN CE, WI CE, ND CE, CIMA, CFA, CDFA, NASBA/CPE and CLE credits
- Meals and snacks throughout the event



Bronze Partner

As a Bronze Partner, you will have the opportunity to interact with our membership. You will receive:

- Annual pass to all regular monthly Chapter meetings, held the third Tuesday; anticipated attendance of 175-250. Always RSVP.
- Participation by one rep in Golf Tournament at no charge, plus signage in clubhouse
- Recognition in newsletters and on website

Cost - \$1,000

Bronze Partners are entitled to one sixth-page ad in a monthly newsletter, with fees received by January 31, 2014.

Additional Opps

Speaking Opportunities and Sponsorships are available at the Annual Symposium and Monthly Meetings depending on topic and interest from members. Every year, we survey our members and choose topics from the top 15. If interested in this opportunity, send PowerPoint, speaker bio, testimonials, video clips, etc. to the FPA Office, office@fpamn.org.

For additional exposure, consider hosting breakfast, lunch or breaks at the Annual Symposium.

Open to Everyone - Sponsor any of the Golf and Bocce Ball Outing activities or contests. It's a great way to get extra exposure to our membership without additional cost and tons of fun in a relaxed environment.

See the Letter of Agreement for details and pricing.

À LA CARTE PRICES

- Golf Tournament Title Sponsorship ... \$10,000
- Golf & Symposium Extras from \$200
- Ad in FPA Directory from \$500
- Annual Season Pass \$655
- Ad in FPA MN Chapter News from \$120
- Monthly Door Prize from \$50