FPA OF MINNESOTA
FINANCIAL PLANNING ASSOCIATION

Minnesota Chapter
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Symposium 2014: Planning for Success
FREQUENTLY ASKED QUESTIONS

Q: **What is FPA?**

A: The Financial Planning Association of Minnesota is a not for profit professional association. Ours is to be the community that fosters the value of financial planning and advances the practice and the profession of financial planning. As one of the 10 largest chapters in the United States, the FPA of MN consists of more than 820 members from all around Minnesota. FPA prides itself on being the Heart of Financial Planning, whose goal is to bring together those who deliver financial planning, those who support it and those who benefit from it. At FPA, our core values represent who we are. They describe our intended state of being. They are so integral to our being that we would not abandon them even if we were penalized for holding them. We want to attract as members those who share our values:

- Competence: Our dedication to competence requires not only lifelong learning, but also that we continually assess our ability to appropriately and effectively address the needs of those whom we serve.
- Integrity: We strive to have ever more congruence between our words and deeds, and to deliver genuine value to those whom we serve.
- Relationships: We are committed to open, inclusive and respectful relationships, including collaboration among diverse parties on common interests.
- Stewardship: We recognize our responsibility to act with vision, ever mindful of the effects of our actions today and tomorrow on the future.

Q: **What is FPA's mission?**

A: The Financial Planning Association of Minnesota champions the value of the financial planning process and advances the financial planning profession with the CFP® mark as its cornerstone. FPA of Minnesota seeks to:

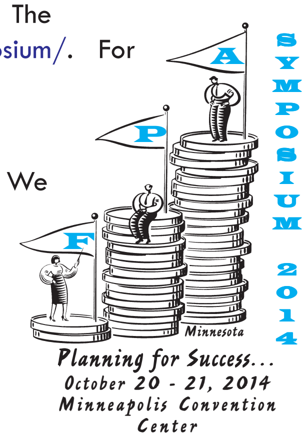
- Foster competent, committed and ethical members
- Provide educational and networking opportunities to assist members in their efforts to achieve personal and professional fulfillment;
- Build and retain a growing membership with a shared passion through creating a community that brings together those who deliver, support and benefit from financial planning; and
- Help people recognize the value and provide access to the financial planning process as a way to achieve their goals and dreams.

Q: **What-Where-When?**

A: The **Symposium 2014: Planning for Success** will be held at the Minneapolis Convention Center on October 20-21st, 2014. The event begins at 7:00 am on MONDAY, and ends at 5:00 pm on TUESDAY. The information and schedule are online: http://www.fpamn.org/financial-professionals/symposium/. For driving directions, visit: http://www.minneapolisconventioncenter.com.

Q: **Who else is exhibiting at Symposium 2014?**

A: To keep the ratio of attendee/member to partner high, we cap our partners at 50 per year. We hope to give you an excellent opportunity to develop some profitable relationships with FPA members and other financial professional attendees. Again this year - location on the Upper Level providing a more private setting and the opportunity to speak with attendees throughout the day. Monday lunch and the breaks will be held in the exhibitor areas. Tuesday lunch is plated and each partner will host one of the tables. The reception will be held in the fabulous glass-walled Seasons and lobby area. Exhibit space is assigned within participation levels, beginning with the platinum, then gold and silver.



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Q: **How many attendees are expected?**
A: We're planning for 600. Last year, we had 577. Our goal is to focus on the entire financial planning community!

Q: **Can I attend and not exhibit?**
A: Attendee registration is limited to 650. At FPA, we encourage you to take advantage of the profitable access to the financial planning professional as an exhibitor.

Q: **Can I bring extra representatives? How many should I bring?**
A: Attendance of two representatives is included as part of your exhibitor fee. Due to the large numbers of attendees, it is recommended that you have two individuals at the booth throughout the day. Extra reps are permitted for an additional $300.

Q: **Do I have to stay for the whole conference?**
A: A representative must be at your exhibit space during all posted exhibit hours. Although <u>we prefer you to stay for the entire conference</u>, if you must catch a flight, take down is allowed <u>after 2:40 pm</u> on Tuesday.

Q: **Can I attend the sessions and meals?**
A: Yes, to acquire a better understanding of current trends in the financial planning profession, we encourage you to participate in as many sessions as you wish. Plan to join us for networking at the reception also!

Q: **By being a partner, what are my Symposium benefits?**
A: Partnership at the Platinum, Gold and Silver levels includes a 8 x 10 booth, one conference binder, recognition and signage, access of up to 600 attendees, and an electronic spreadsheet of attendees before and after the Symposium. All levels include meals, breaks, and the evening reception. Plat, Gold and Silver Partners receive other benefits as listed in Benefits At A Glance. In addition to exposure at the conference, your company will receive the following benefits as an exhibitor:

- Listing in the FPA of MN monthly newsletter as a supporting sponsor (3000+ distributed each month)
- Listing in the Symposium 2014 program schedule (5000+ distributed by mail to financial professionals)
- Promotion on the FPA of MN website (www.fpamn.org)
- Company insert in attendees' conference notebook (650 notebooks)
- Complimentary conference manual, including conference attendee mailing list
- Two complimentary conference registrations, including up to 14 CFP®, MN, NASBA, WI CEU, and CIMA credits
- All meals (Monday continental breakfast, lunch, and reception; Tuesday continental breakfast and plated lunch)
- Name recognition to over 5000 financial professionals.

Q: **How can I decorate my exhibit space? What can I do or not do?**
A: Your exhibit space is limited only to your imagination. Please keep liability issues in mind when deciding on your decorations. Any furniture such as tables, podiums, plants, TV/monitor stands or bookcases are permitted, but all objects that are higher than three feet should be placed near the back of your booth so as not to block the view or front area of any exhibitors around you. Storage of literature and catalogs must be under or on the provided table. Table cloths with company logos are permitted. No items may extend into the aisles.

Q: **When can I set up and tear down?**
A: All sponsors will have a single booth space of 8' x 10', one draped table, two folding chairs, a company identification sign, and general security. Set up time is scheduled for Sunday between 6:00-8:30 pm or early Monday morning. Set up must be completed by 7:15 am. If you have a lot to unload, drive around back and enter through the gated entrance into the underground parking area. You will definitely want to have a dolly. The conference ends at 5:00 pm on Tuesday. Although <u>we prefer you stay for the entire conference</u>, if you must catch a flight, take down is allowed AFTER 2:40 pm on Tuesday. **<u>Take down before 2:40 pm will not be permitted without special permission.</u>** Take down must be completed by 6:00 pm.

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Q: **Where can I ship my booth and conference handouts?**

A: The Convention Center does not allow you to ship materials to it directly. Prepaid freight will be accepted by the Service Contractor Hubbell/Tyner, 2110 Old Hwy 8 NW, New Brighton MN 55112, 651-280-4925. Some of the hotels may allow pre-shipping of materials to them if you have reserved lodging. An Exhibitor Service Kit and order form will be forwarded electronically 6-8 weeks before the event.

Q: **How do I order electricity or special av needs?**

A: You may order additional items for your booth such as electrical hookup, telephone, or audio-visual equipment by completing the Order Forms in the Exhibitor Service Kit. Costs for these special needs are the responsibility of the exhibitor and must be paid for prior to the event. Exhibitor Service Kits will be forwarded electronically 6-8 weeks prior to the event.

Q: **How much literature should I bring?**

A: Bring enough materials for approximately 600 attendees.

Q: **When are exhibitor hours?**

A: Monday, October 20th: 7:00 am - 6:30 pm and Tuesday, October 21st: 7:15 am - 5:00 pm.

Q: **Will I have time to network with members?**

A: Yes, again this year the entire lobby of the Upper Level will be reserved for exhibitors only. You will be able to network throughout the entire conference. The lunch setting on Monday will be a walk-n-talk; on Tuesday, it will be a plated lunch with tables hosted by our annual partners. The reception Monday evening will be in the Seasons (same level). We also encourage you to invite several members to join you in socializing Monday evening following the reception.

Q: **What is the dress code?**

A: The dress code is business/business casual. Keep in mind that weather in Minnesota can be very unpredictable.

Q: **What is the FPA refund policy?**

A: There are no refunds for cancellations or no shows.

Q: **Where should I stay?**

A: Lodging is the responsibility of the exhibitor. However, we have secured a special discounted rate at the Millennium (612-332-6000), which is connected to the Minneapolis Convention Center by the skywalk. Rooms are not guaranteed to be available after the room block has been filled so we suggest you call the hotel early. The last two years they have sold out. http://www.fpamn.org/financial-professionals/symposium/#lodging

Q: **What do I need to do to be an exhibitor?**

A: Be sure to use your marketing calendar (sent early January) and read your monthly emails from the FPA Office. The emails will alert you to special items or requests for our annual partners.

Q: **How do I give and receive feedback?**

A: Throughout the event, the Board, Symposium Director and Committee Members will stop by your booth. This provides you with an excellent opportunity to give your opinions and input on next year's symposium. We strive to make this event an excellent opportunity for you and for our members - it is important you take a few minutes to share your thoughts. Also, the Committee Members will be providing you with details on the annual partnership packages that will be available for 2015, which will again allow partners to participate in a variety of events and activities throughout the year. If you would like to meet with a Committee member one-on-one, schedule an appointment with Bonnie at the registration desk. Evaluations are distributed for each session and the overall event.

Q: **Who do I contact if I have additional questions?**

A: Bonnie Stanley, Executive Director, 763-781-1212, office@fpamn.org; or Craig Jergenson, Partnership Director, 763-783-0099, coachcraig@ziglerandassociates.com