



Minnesota Chapter  
3900 Main Street N.E.  
Minneapolis, MN 55421  
Office (763) 781-1212  
[www.FPAMN.org](http://www.FPAMN.org)

Thanks for communicating with us about partnering with the Financial Planning Association of Minnesota. We're excited to hear of your interest to work together in 2019!

We've included links below that provide information on our 2019 MN Partnership Packages which include OneFPA Annual Conference upgrade benefits!

- Partnerships: [Partner Resource Page](#)
- About Us and [Demographics](#)

The Benefits at a Glance explains the Three different partnership levels, their benefits, and the costs. The Gold, and Silver levels offer local Minnesota chapter benefits in addition to exhibition space at our FPA National Conference in Minneapolis. FPA National has extended special benefits to Minnesota Partners looking to enhance National Exposure, so be sure to consider the NEW Upgrade Options available for 2019 only!

The FPA of MN Chapter has approximately 880 members. Attendance at the ten chapter meetings ranges between 150 - 300. Every fall, the Annual Symposium attracts state-wide attendees, consistently breaking attendance records. We are excited to announce that the 2019 Annual Symposium will be combined with the FPA National Conference in Minneapolis! We anticipate over 2,500 registrants at this year's National Conference in Minneapolis.

Here are some other important statistics:

- Average member age = 49 years old
- 72% of members have ten plus years of professional experience
- 67% of members are CFP® professionals
- 54% hold their MN insurance license
- 71% have at least a Bachelor's

Top financial services provided:

- 77% Retirement planning
- 72% Financial planning
- 70% Investment/Asset management
- 69% Estate planning
- Other top-ranking areas include:  
Education & Comprehensive planning

The first step in securing your spot for 2019 is to fill out and return the Letter of Agreement; and then follow up with your payment. The form will tentatively hold your spot; please email completed form to [office@fpamn.org](mailto:office@fpamn.org).

If you have any other questions, feel free to communicate with any of the Partnership Director or the FPA Executive Director:

**Shawn Jacobson**, 2019 Partnership Director  
612-367-8818  
[shawn@northrockpartners.com](mailto:shawn@northrockpartners.com)

**Jessica Hawthorne**, Executive Director  
763-781-1212  
[office@fpamn.org](mailto:office@fpamn.org)

# YOUR BENEFITS AT A GLANCE FOR YEAR 2019

<b>BENEFITS</b>		<b>GOLD \$6,750</b>	<b>SILVER \$6,250</b>	<b>BRONZE \$1,000</b>
<b>NETWORKING &amp; MARKETING BENEFITS</b>	Social Media post to followers through FPA MN	•		
	Firm's logo on <a href="#">FPA website</a> with a direct link to website	•		
	Full page electronic ad in FPA MN Member Directory	•		
	Electronic spreadsheet of FPA MN membership ( <i>up to 4 mailings</i> )	•		
	Golf/Bocce Tournament - special signage at a hole	•		
	Add up to 3 links & Partner Video link in <a href="#">Partner Resource Library</a>	•	•	
	Attendee list from <a href="#">FPA Annual Conference</a> - one pre- and one post-mailing	•	•	•
	Recognition on all FPA MN promotions including mailers, online portal, website, newsletters, signage and advertising materials	•	•	•
	Monthly FPA MN <a href="#">E-Newsletter</a> /Quarterly Partner Calls	•	•	•
	One Rep at shared partner table at a <a href="#">chapter meeting</a>	•		
	Exclusive attendance at all FPA MN NexGen and K'Nex Events	•		
	Exclusive attendance at First Year Member Socials	•		
	Exhibit space at the <a href="#">FPA Annual Conference</a> , Oct. 13-19, 2019 <i>Gold and Silver packages include Booth (10 x 10)</i>	•	•	
	Complimentary Representatives at the <a href="#">FPA Annual Conference</a> , Oct. 13-19, 2019	<i>Up to 2</i>	<i>Up to 2</i>	<i>Upgrade Options below</i>
	One Annual Pass to all ten <a href="#">monthly chapter meetings</a>	•	•	•
One Golf/Bocce Ball Outing participant & signage in clubhouse	•	•	•	
<b>OPTIONS TO UPGRADE NATIONAL CONFERENCE BENEFITS</b>	<b>GOLD</b>	<b>SILVER</b>	<b>BRONZE</b>	
Booth (10 x 10)	+\$0	+\$0	+\$5,500	
Bronze (A)	+\$13,250	+\$14,500	+\$17,000	
Bronze (B)	+\$20,250	+\$21,500	+\$24,000	
Silver	+\$35,250	+\$36,500	+\$39,000	
<b>Pay promptly to secure your partnership!</b>	<i>Limited Availability</i>	<i>Limited Availability</i>	<i>Limited Availability</i>	

# LETTER OF AGREEMENT FOR YEAR 2019

The undersigned hereby applies to become a Partner of the Financial Planning Association of Minnesota chapter (FPA of MN) for the 2019 sponsorship year. If Partner is accepted, by signing below, Partner understands that this agreement serves for the 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 benefits and upgrade options.
- 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 Diamond and 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.
- Increase attendance by inviting a non-profit association, their members and their sponsor to partake in a chapter meeting. The non-profit and sponsor will be in agreement that their promotions and materials will not be in direct competition with our Diamond or Platinum Host partner offerings. Request *Joint Meeting Policy with other Non-Profit Associations* for details.

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 dedicated partner representative is: \_\_\_\_\_

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Website

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Toll Free Number

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Fax

# 2019 FPA ANNUAL CONFERENCE UPGRADES

## ONE FPA PARTNERSHIP OPPORTUNITIES & BENEFITS

### Bronze A Benefits

- 4 Available Opportunities
- Speaking Opportunity: 30 Minutes
- 10x10 Exhibition Space
- 3 Complimentary registrations
- Logo recognition in Journal of Financial Planning for Conference edition
- Logo recognition/company description in mobile app
- Pre & post attendee mailing list

### Bronze B Benefits

- 8 Available Opportunities
- Speaking Opportunity: 60 Minutes
- 10x10 Exhibition Space
- 3 Complimentary registrations
- Logo recognition in Journal of Financial Planning for Conference edition
- Logo recognition/company description in mobile app
- Pre & post attendee mailing list

### Sliver Benefits

- 5 Available Opportunities
- Speaking Opportunity: 30 – 60 Minutes with Quality Session Starting Time
- 10x10 Exhibition Space
- 4 Complimentary registrations
- Logo recognition in Journal of Financial Planning for Conference edition
- Logo recognition/company description in mobile app
- Pre & post attendee mailing list
- Recognition during General Session
- Recognition on conference signage

## FPA OF MINNESOTA BENEFIT SELECTION SHEET

### MN Golf & Bocce Ball Outing Upgrades:

- Gold & Silver: Out at Tee Opportunity - \$250
- Winning Golf Teams Sponsor - \$500
- Bocce Ball Tourney & Golf Clinic - \$500
- Putting Contest - \$500
- Straightest Drive Men & Women- \$500
- Closest to Hole Men & Women - \$500
- Longest Putt Men & Women - \$500
- Hole in One Grand Prize \$10K Cash/Car - \$500
- Hole in One 1<sup>st</sup>, 2<sup>nd</sup> or 3<sup>rd</sup> Place Prize - \$250 each
- Lunch Sponsor - \$300
- Driving Range - \$250
- Partee Cart - \$250 (2 available)
- Beverage Cart - \$500 (2 available)
- GPS Cart Ad - \$100 (18 if available)
- Raffle Prizes (\$50 Value)
- Cloth Bags for Give-Away Donations
- Goody Bag Donations/Trinkets

### GOLD LEVEL:

Top 2 monthly meeting choices for shared partner table:

1. \_\_\_\_\_
2. \_\_\_\_\_

### TO-DO's GOLDS:

- Email Social Media Handles for FPA PR
- Email Social Media Post for FPA distribution
- Email PDF for online Member Directory
- Request database for up to 4 mailings

### TO-DO's for ALL PARTNERS:

- Review FPA MN calendar and annual to-do's
- Email logo for website and online promotion
- Email website, video and/or resource links to load to [Partner Resource Library](#)

**MN NexGen and K'Nex Event Upgrades:**

- Sponsor NexGen Social - \$200
- Sponsor NexGen Symposium Social - \$275
- Sponsor K'nex Event – Educational event - \$500

[Click for more NexGen Sponsorship Information](#)

**Financial Planning Day Upgrades:**

- I'm interested, please contact with more details

**Special Note:**

*The FPA of Minnesota may have some special opportunities throughout the year for sponsorships that would provide you with additional exposure. As those become available, we will reach out to you by email – with absolutely no obligation on your part. **We are very appreciative of all that you do for us.***

**Diamond, Platinum, Gold, Silver and Bronze Sponsors:  
Submit Letter of Agreement and Payment to secure your 2019 Partnership**

**Sign Me Up for 2019 MN Partnership**

- Gold Partner - \$6,750
- Silver Partner - \$6,250
- Bronze Partner - \$1,000
  - Bronze upgrade option to include Exhibit Booth 10x10 - \$6,500

**Total Due** ..... \$ \_\_\_\_\_

**OneFPA National Upgrade Benefits Selection**

- Booth (10 x 10)
- Bronze (A)
- Bronze (B)
- Silver

Email [StrategicPartnerships@oneFPA.org](mailto:StrategicPartnerships@oneFPA.org) to confirm upgrade availability, determine pricing and arrange payment to secure partnership.

**Payment Options:**

- Check
- Credit Card
- Wire Transfer

Please return all signed agreements to via email to [StrategicPartnerships@oneFPA.org](mailto:StrategicPartnerships@oneFPA.org)

Letter of Agreements will be processed in order received.

**Payment and Cancellation Policy:**

*Following receipt of this application, an invoice may be provided upon request, to be paid in full no later than 90 days prior to the event. Speaking assignments will be made, based on availability, in the order in which signed and paid applications are received and accepted by FPA. Cancellation notifications must be made to FPA Corporate Relations by 90 days prior to the event to receive a 50% refund. No reimbursements will be made after this date.*

**We look forward to partnering with you again in 2019!**

**OneFPA**

7535 E. Hampden Ave. Suite #600 Denver, Colorado 80231

Jeff Yeager

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303-867-7153

**FPA of Minnesota**

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