



FINANCIAL PLANNING ASSOCIATION  
OF NORTH ALABAMA PARTNERSHIPS

**2018**



*OF NORTH ALABAMA*

WWW.FPANA.ORG

FPAOFNORTHALABAMA@GMAIL.COM

FPA North Alabama partnerships are on a first come, first serve basis. To reserve your partnership, please contact

Jim Sumpter – [jsumpter@rfgadvisory.com](mailto:jsumpter@rfgadvisory.com) or call 205.510.9074.

## **OUR VISION FOR OUR PARTNERS:**

*To develop a long term, professional and mutually profitable relationship with our sponsor partners and to create an excellent working relationship between our members and partners.*

The Financial Planning Association is one of the largest, most active, and most sophisticated financial advisor groups in the country with over 23,000 members and nearly 100 active local chapters. The FPA North Alabama is widely recognized as a leader in the financial planning community and one of the most successful chapters in the country.

Our chapter recently received an Outstanding Achievement Award in the categories of Advocacy, Financial Literacy, and Partnering with Like-Minded Organizations.

Our members include financial planners, broker dealers, insurance professionals, attorneys, CPAs, investment specialists as well as banking and thrift professionals. Your promotional activities reach an ideal target audience.

The FPA North Alabama's 175+ members are a valuable audience. Members collectively manage substantial investment assets on behalf of clients. Many FPA members are nationally known and active within leading professional groups and societies. FPA North Alabama members have a wide range of industry experience ranging from seasoned forty or more years to novice first year planners.

### **PARTNER BENEFITS**

#### **RECOGNITION**

Visibility as a FPA North Alabama partner throughout the year at all FPANA events, in all newsletters, as well as on our website.

#### **EXPOSURE**

You are welcomed to our chapter events and introduced to our membership on a consistent basis. The financial professionals you'll meet through the FPANA 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. Platinum and Gold level partners can 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, partner event, and annual symposium. It's an excellent time to collect business cards for follow-up marketing.

#### **EXHIBITOR SPACE**

Exhibitor space at our annual FPA North Alabama Symposium.

## **QUICKFACTS**

*Of the current chapter members that reported:*

- Members are
  - 72% CFPs
  - 10% ChFCs
  - 11% CPAs
  
- Members who hold
  - 42% Bachelor's Degree
  - 40% Master's Degree
  - 18% Ph.D.
  
- Members Who Hold
  - 41% Series 7
  - 50% Series 63,65, or 66
  
- Members Licensed
  - 38% Life Insurance
  - 32% Health Insurance
  - 23% Fixed Annuity
  - 24% Variable Annuity
  
- Compensation
  - 36% Fee Only
  - 2% Commission Only
  - 62% Fee Based
  
- Long term involvement equals lasting relationships

<b>BENEFITS</b>		<b>Value</b>	<b>Platinum</b>	<b>Gold</b>	<b>Silver</b>	<b>Non-Profit</b>	<b>Internal</b>
			<b>Limit 1 \$3,500</b>	<b>Limit 6 \$2,500</b>	<b>Unlimited \$1,500</b>	<b>Limit 2 \$1,000</b>	<b>Unlimited \$1,000</b>
1	Keynote Presenting Sponsor of Educational Speaker at 2018 FPANA Symposium - Must be CFP approved CE	\$400	●				
2	10 Minute Sponsor Spotlight at 2018 FPANA Symposium	\$200	●				
3	Sponsor of 2018 FPANA Symposium After Party	\$300	●				
4	Premium Exhibit Space at 2018 FPANA Symposium	\$300	●				
5	Partner recognition with a Luncheon table "tent card". Marketing materials at chapter meetings with RSVP	\$100	●	●			
6	Partner with FPANA Board Member for 2018 as a liaison for strategic introductions	\$250	●	●			
7	One Feature Article in monthly FPANA Newsletter (digital) - Must provide content 1 month prior	\$250	●	●			
8	Four Email Blasts Per Year to Membership	\$200	●	●			
9	Presenting Sponsor of 50 Minute Educational Speaker at 2018 Symposium OR FPANA Chapter Meeting (1) Must be CFP approved CE	\$200	●	●			
10	Advertising in Monthly Newsletter (digital) - Must provide content 1 month prior	\$400, \$300, \$200	(3) Full Page	(3) 1/2 Page	(2) 1/2 Page	(2) 1/2 Page	
11	Two Email Blasts Per Year to Membership	\$100			●	●	
12	Symposium Exhibit Space, Invitation for 2 to Symposium After Party	\$250	See # 3	●	●	●	
13	Promotion of any CE conference or event that your company is offering - Separate Email to Membership	\$250	●	●	●	●	●
14	Eight FPANA Luncheon Chapter Meeting Invitations	\$10 Per Meeting	2 Per Meeting	2 Per Meeting	2 Per Meeting	2 Per Meeting	
15	Invitation for Annual Partnership/Networking event - i.e. Baron's Game	\$15 Each	4 Tickets	2 Tickets	2 Tickets	2 Tickets	
16	Year Long listing on FPANA Website (link to your website and email)	Priceless	●	●	●	●	●
17	Regular Recognition as a Sponsor at ALL FPANA meetings, events, and Newsletters	\$500	●	●	●	●	●
18	Annual Access to our FPANA Membership List - Firm Name and Address as reported to FPA	Priceless	●	●	●	●	●

## BENEFITS OF PARTNERING WITH FPA North Alabama

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 the ONEFPA's message of building the community of the financial planning profession, with your commitment to the association, our mission and members.

Visit our chapter website at: [www.fpana.org](http://www.fpana.org)

For information on our mission and vision, as well as detailed information on planned activities.



### Letter of Agreement for FPANA Corporate Sponsors

The undersigned party (herein after "Partner") hereby applies to become a Corporate Partner of the FPA North Alabama chapter under the terms of the "Corporate Partnership Program" (herein after "Program") for the current partnership year. If Partner is accepted to the Program, Partner further agrees to a partnership contract term of one calendar year, payable upfront.

The FPA North Alabama chapter (herein after "FPANA") strives to develop quality partnership relationships with partners 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 use the benefits within the calendar year.

The Program limits the number of partners in a given year. Furthermore, the qualified partners shall represent a cross-section of the industry. In most cases the invitation has been extended to only a few qualified partners in each business category.

#### RESPONSIBILITIES OF PARTNERS:

##### Responsibilities of the Partner will include:

- Prompt payment of annual partnership fee (\$ based on level selected)
- Active participation in the education of our membership on your company's products and services
- Assume the responsibility to take advantage of the benefits to be used within the calendar year
- Provide company logo, website address, contact name, phone and email for website and newsletter listings
- Provide booth materials and set up at the annual FPANA Financial Planning Symposium

##### FPANA may:

- At its sole discretion, accept, deny, non-renew, and/or terminate Partner for cause with no refunds or carry-overs
- 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 fee and/or benefits at renewal with a 30-day notice

# SPONSORSHIP LEVELS FOR 2018

***We want your relationship with FPANA to be successful, and your PARTICIPATION in our Chapter is the key! Get involved by volunteering, attending all monthly meetings, attending partner events as well as Symposium! The more you put in, the more you'll get out.***

## **FIVE LEVELS OF PARTNERS:**

### **I. Platinum Partner – Limited to 1 – Platinum and Gold levels are the highest level of FPANA Partnership.**

#### **Eligibility requirements for Platinum Partners:**

- Priority in 2018 will be given to the Platinum Partner in the previous year.
- The prior year Platinum Partner will have until October 31, 2017 to submit the signed agreement. After October 31st, this level of sponsorship will be given to the first new sponsor that submits a completed signed Agreement. If there is a conflict, the Board will decide via a majority vote.
- Payment in full needs to be made by January 31, 2018, unless an extension of time is approved by a Board Representative
- Please see Chart (page 3) for all Benefits

### **II. Gold Partner – Limited to 6 – Platinum and Gold levels are the highest level of FPANA Partnership.**

#### **Eligibility requirements for Gold Partners:**

- Priority in 2018 will be given to External Sponsors in the previous year.
- The first 6 External Sponsors to submit a signed agreement will be Gold Sponsors for 2018.
- November 1, 2017, if spots remain, this Partnership Level will be opened up to those companies that were not External Partners in 2017. If there is a conflict, the Board will decide via a majority vote.
- Payment in full needs to be made by January 31, 2018, unless an extension of time is approved by Board Representative
- Please see Chart (page 3) for all Benefits

### **III. Silver Partner – Unlimited**

#### **Eligibility requirements for Silver Partners:**

- Signed Agreements will need to be submitted by January 1, 2018
- Payment in full needs to be made by January 31, 2018, unless an extension of time is approved by a Board Representative
- Please see Chart (page 3) for all Benefits

### **IV. Non-Profit Partner – Limited to 2**

#### **Eligibility requirements for Non-Profit Partners:**

- Signed Agreements will need to be submitted by January 1, 2018
- Payment in full needs to be made by January 31, 2018, unless an extension of time is approved by a Board Representative
- Please see Chart (page 3) for all Benefits

### **V. Internal Partner – Unlimited**

#### **Eligibility requirements for Internal Partners:**

- None

*If you would like to discuss partnership opportunities in greater detail, please contact Jim Sumpter, FPANA Partnerships Director, at 205.510.9074 or [jsumpter@rfgadvisory.com](mailto:jsumpter@rfgadvisory.com). All Partnership Packages are based on the 2018 calendar year. FPANA reserves the right to require all membership literature, correspondence and ad submissions to conform to our policies and format regulations, and may require all sponsor speaker presentations be eligible for quality CE credit, as well as speaker outlines, bios and handouts be submitted by the requested due date in order to be eligible for a sponsor speaker presentation time for the monthly meetings, the Symposium or any other speaking event.*



# OF NORTH ALABAMA

**Partner agrees to the above terms, and hereby applies for a partnership with FPANA:**

Entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Signed by:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed name

\_\_\_\_\_  
Name and Title of Company Representative if different than above

\_\_\_\_\_  
Company Name – as you want it listed on the website and in newsletters

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

\_\_\_\_\_  
Website (to be linked to FPANA website)

\* If you are a new FPANA Corporate Partner, or if you are an existing Partner and your logo has changed, please send your company logo to Pat Morris, FPANA Executive Director, at fpaofnorthalabama@gmail.com in JPG or GIF format.

\* If you have associates, internals, marketing reps, etc. that you would like for us to include on our chapter emails please list them here.

\_\_\_\_\_  
Printed Name E-Mail

\_\_\_\_\_  
Printed Name E-Mail

### SPONSORSHIP LEVEL

**Check one:**  Platinum  Gold  Silver  Non-Profit  Internal

### PAYMENT OPTIONS

**Check one:**  I plan to use 2016 monies  I plan to use 2017 monies

**Check one:**  Check enclosed  Check will be mailed  Paying by credit card

Credit Card Type: AMEX VISA MC Name on card \_\_\_\_\_

CC Number \_\_\_\_\_ Exp date \_\_\_\_\_ CSC# \_\_\_\_\_

Make Checks Payable and Mail to: The FPA of North Alabama, PO Box 26607, Birmingham, AL 35260

Email: fpaofnorthalabama@gmail.com