



**FINANCIAL
PLANNING
ASSOCIATION**

NORTH ALABAMA



2026

FPA OF NORTH ALABAMA PARTNERSHIP PROGRAM

WWW.FPANA.ORG

fpaofnorthalabama@gmail.com

OUR VISION FOR OUR PARTNERS

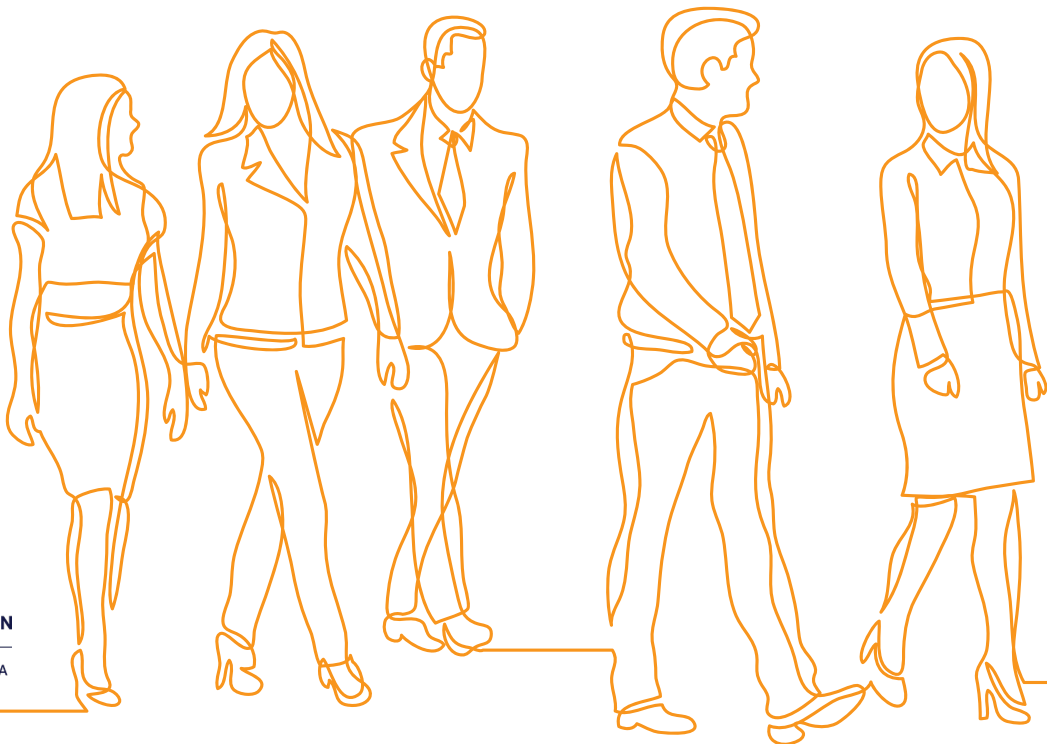
To develop a long-term, professional and mutually profitable relationship with our sponsor partners and to create an excellent working relationship between our members and partners.

The Financial Planning Association is one of the largest, most active, and most sophisticated financial advisor groups in the country with over 17,000 members (over 72% are CFP® professionals!) and 76 active local chapters. The FPA chapter of 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 is a past recipient of 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.

Our chapter's 160+ members are a dynamic, vibrant 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 of North Alabama's 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 an FPA of North Alabama partner throughout the year at all FPANA events, in all newsletters, as well as on our website and social media.

EXPOSURE

You are welcomed to our chapter events and will be 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 their materials at our monthly chapter meetings to a targeted audience.

OPPORTUNITIES

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

EXHIBITOR SPACE

Exhibitor space at our annual Symposium.



QUICK FACTS

Of the current chapter members that reported:

- Members are
 - 76% CFPs
 - 12% CPAs
 - 7% ChFCs
- Members who hold
 - 42% Bachelor's Degree
 - 40% Master's Degree
 - 18% Ph.D.
- Members who hold
 - 45% Series 63, 65, or 66
 - 29% Series 6 or 7
- Members licensed
 - 24% Life Insurance
 - 19% Health Insurance
 - 15% Variable Annuity
 - 14% Fixed Annuity
- Compensation
 - 62% Fee Based
 - 36% Fee Only
 - 2% Commission Only
- Long-term involvement equals lasting relationships

FPA North Alabama Links

CHAPTER WEBSITE

PARTNERS PAGE

FOLLOW US ON LINKEDIN AND INSTAGRAM

FPANA partnerships are on a first come, first serve basis.

To reserve your partnership, please contact:

Luke Fargason– luke@navigatewealth.com or call (205) 994-2307.

PARTNER BENEFITS		Value	UNLIMITED	UNLIMITED	LIMIT 6	LIMIT 1
			Patron \$1,000	Silver \$1,850	Gold \$3,500	Platinum \$5,350
1	Keynote Presenting Sponsor of Educational Speaker at FPANA Symposium - Must be CFP approved CE	\$1,500				●
2	10 Minute Sponsor Spotlight at FPANA Symposium	\$500				●
3	Sponsor of FPANA Symposium After Party	\$500				●
4	Premium Exhibit Space at FPANA Symposium	\$500			●	●
5	Partner with FPANA Board Member as a liaison for strategic introductions	\$250			●	●
6	One Feature Article in monthly FPANA Newsletter (digital) - Must provide content 1 month prior	\$250			●	●
7	Presenting Sponsor of 50 Minute Educational Speaker at Symposium OR FPANA Chapter Meeting (1) Must be CFP approved CE	\$750			●	See # 1
8	Email Blasts and/or Social Media Posts per Membership Year	\$200		2	4	4
9	Advertising in Monthly Newsletter (digital) - Must provide content 1 month prior	\$400 \$200	(1) 1/2 Page	(2) 1/2 Page	(3) 1/2 Page	(3) Full Page
10	Symposium Exhibit Space, Invitation for 2 to Symposium and Welcome Party	\$500		●	●	See # 4
11	Promotion of any CE conference or event that your company is offering - Separate email to membership and social media promotion	\$250	1	1	2	2
12	Eight FPANA Luncheon Chapter Meeting Invitations (Two tickets per meeting)	\$20 Per Meeting	●	●	●	●
13	Tickets to our Annual Partnership/Networking event - i.e. Baron's Game, Top Golf Event	\$20 Each	2	2	2	4
14	Year Long listing on FPANA Website (link to your website)	Priceless	●	●	●	●
15	Regular recognition as a Sponsor at ALL FPANA meetings, events, and newsletters	\$1,000	●	●	●	●
Total Estimated Partner Benefits			\$1,810	\$2,910	\$5,510	\$7,400

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 for details on our mission and vision, and planned activities at: www.fpana.org

PARTNER RESPONSIBILITIES 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 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

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.



SPONSORSHIP LEVELS

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.

FOUR LEVELS OF PARTNERS

I. PLATINUM PARTNER ELIGIBILITY REQUIREMENTS – (Limited to 1):

- Priority for 2026 will be given to the Platinum Partner in the previous year (limited to 2 consecutive years).
- The prior year Platinum Partner will have until December 1, 2025 to submit a signed agreement. After December 1st, 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, 2026, unless an extension of time is approved by a Board Representative.

II. GOLD PARTNER ELIGIBILITY REQUIREMENTS – (Limited to 6):

- Priority in 2026 will be given to Gold Sponsors in the previous year.
- The first 6 Gold Sponsors to submit a signed agreement will be Gold Sponsors.
- As of December 31, 2025, if spots remain, this Partnership Level will be available to those companies that were not Gold Partners in 2025. If there is a conflict, the Board will decide via a majority vote.
- Payment in full needs to be made by January 31, 2026, unless an extension of time is approved by a Board Representative.

III. SILVER PARTNER ELIGIBILITY REQUIREMENTS – (Unlimited Partners):

- Signed agreements will need to be submitted and payments in full will need to be made by January 31st, 2026, unless an extension of time is approved by a Board Representative

V. PATRON PARTNER ELIGIBILITY REQUIREMENTS – (Unlimited Partners):

- Patron Partners are limited to: RIAs, Independent Advisory Firms, Credit Unions, Banks, and other Wealth Management Firms located within the FPA of North Alabama's geographic area and at least one member of the Financial Planning Association

If you would like to discuss partnership opportunities in greater detail, please contact Luke Fargason, FPANA Partnerships Director, at (205) 994-2307, or luke@navigatewealth.com. All Partnership Packages are based on the 2026 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, Annual Symposium, or any other speaking event.

FPA of North Alabama Partnership Agreement

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)

NOTE: 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 the FPANA Executive Director, at fpafnorthalabama@gmail.com in JPG 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 Patron

PAYMENT: (Check one) I plan to use 2025 monies I plan to use 2026 monies

Pay online at www.fpana.org (preferred)

Email: fpafnorthalabama@gmail.com

OR:

To pay via check, please reach out to FPA NA Partnerships Director, Luke Fargason, at luke@navigatewealth.com



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