

FINANCIAL PLANNING ASSOCIATION OF OREGON & S.W. WASHINGTON

Sponsorship Opportunities

By becoming an FPA sponsor, you further educate and develop our industry.

FPA can connect you with individuals and organizations that are at the forefront of knowledge and expertise, while helping you raise your organization's profile and awareness within the industry.

INCREASE reach through affiliation with FPA.

OBTAIN direct access to FPA members.

INTRODUCE new products and services to key leaders in the field.

NETWORK with professionals in the industry.

ACHIEVE public recognition as an organization that's making a difference in the industry.

FPA of Oregon & SW Washington provides professional development and networking on a local level. Our Chapter has over 300 members and one of the most active chapters in the country. We offer continuing education credits for CFP®, Oregon Insurance, and Washington Insurance. Our annual Mid-Winter Conference attracts more than 100 participants each year and our monthly chapter meetings are host between 50 and 100 attendees each month.

The Financial Planning Association of Oregon & SW Washington champions the value of the financial planning process and advances the financial planning profession with the CFP mark as its cornerstone. Our primary aim is to benefit the public by helping to ensure that financial planning is delivered through proficient, ethical financial planners.

Reasons You Should Partner with FPA

- Build brand name recognition
- Provide product education
- Gain industry-wide exposure
- Identify opportunities for your company
- Network with decision makers

FPA of Oregon & S.W. Washington

2018 Sponsorship Program

The Sponsorship Program is designed to provide a venue for industry-leading firms to work closely with our members to gain greater coverage in our Chapter. Sponsors participate in our Monthly Education Meetings, Quarterly Newsletter, on our website, and through word of mouth by being associated with one of the strongest FPA chapters in the country.

<u>ABOUT OUR MEMBERSHIP</u>	<u>ABOUT OUR MEETINGS & EVENTS*</u>
We average about 280 members of who: <ul style="list-style-type: none"> ➤ 205 are CFPs ➤ 123 are RIAs ➤ 121 are OR/WA insurance licensed ➤ Members reside in Salem, Mid-Willamette Valley, Portland Metro area and SW Washington. 	<ul style="list-style-type: none"> ➤ 8 Monthly meetings ➤ 1 Fall CE Education Event ➤ 1 2-day CE Mid-Winter Conference ➤ 1 Annual Tax Update Day ➤ Social Events

The advantages of being a Sponsor are multi-faceted, and each of our three Sponsorship packages provides unique benefits for the Sponsor and their representatives based on their exposure needs. Please see below for a full list of what we offer at each level:

FEATURED SPONSORSHIPS	PLATINUM \$5,000	GOLD \$3,000	SILVER \$1,500
MID-WINTER CONFERENCE			
Exhibit booth	●	●	●
Speaker Sponsorship, CE presentation	●	●	
Podium time - 3 min	●		
Verbal acknowledgement	●	●	
Signage with company logo	Featured	Alphabetical	Alphabetical
Display Ads (PowerPoint/reader boards)	Featured	Alphabetical	Alphabetical
Conference registration	2	1	1
Meal or break sponsorship	●		
FALL CE and TAX UPDATE			
Exhibit Booth	●	●	
Conference registration	2	1	1
Podium time - 3 min	●		
Verbal acknowledgement	●	●	●
MONTHLY MEETINGS			
Meeting registration (1 registration per meeting)	Year Pass	Year Pass	
Self-introduction	●	●	●
Podium time	5 minutes	3 minutes	
Display table	2 meetings	1 meeting	
Social hour sponsorship	●		
EVENT SPONSORSHIPS	Mid-Winter Conference	Monthly Programs	Other Events
Lunch	\$1000		
Reception	\$750		
Breakfast	\$500		
Coffee Cart	\$250		\$250
Break Sponsor	\$500		\$500
Meeting Sponsor		\$500	
Social Events/Next Gen			\$250

FPA of Oregon & S.W. Washington - 2018 Sponsorship Opportunities

Company (exactly as it should appear on all materials): _____

Contact Person: _____ Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

① Featured Sponsorship Selection

- | | |
|---|---------|
| <input type="checkbox"/> Platinum Sponsor | \$5,000 |
| <input type="checkbox"/> Gold Sponsor | \$3,000 |
| <input type="checkbox"/> Silver Sponsor | \$1,500 |

① **Featured Sponsor Total** \$ _____

② Event Sponsorship Selection

- | | |
|--|--------|
| <input type="checkbox"/> Mid-Winter Conference Lunch | \$1000 |
| <input type="checkbox"/> Mid-Winter Conference Reception | \$750 |
| <input type="checkbox"/> Mid-Winter Conference Breakfast | \$500 |
| <input type="checkbox"/> Mid-Winter Conference Coffee Cart | \$250 |
| <input type="checkbox"/> Mid-Winter Conference Break Sponsor | \$500 |
| <input type="checkbox"/> Chapter Meeting Sponsor | \$500 |
| <input type="checkbox"/> Social Events/Next Gen | \$250 |

② **Event Sponsors Total** \$ _____

①+② **Total Amount Due** \$ _____

Requirements and Terms

- FPA reserves the right to change or eliminate events.
- All sponsorships must be paid in full 30 days prior to printing of event materials.
- All sponsorships are sold on first-come, first-served basis. *FPA reserves the right to assign sponsorships.
- *By submitting the Sponsorship Agreement form to the FPA, I understand and agree to the provisions and terms and conditions as listed on this agreement and am authorized to execute this Sponsorship Agreement on behalf of my company.*
- *Cancellation policy: Any cancellations received 30 days prior to event date will receive a 50% refund. Any cancellations received after that will not receive a refund.*

PAYMENT: **Check** (payable to FPA) or **Credit Card** - Visa MasterCard American Express Discover

Card Number: _____ Exp. Date: _____ Amount Authorized: \$ _____

Cardholder Name: _____ Signature: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Send completed form with payment to: FPA | 147 SE 102nd Avenue, Portland OR 97216 * Fax to 503.253.9172