

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.

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.

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.

ABOUT OUR MEMBERSHIP

We average about 280 members of who:

- 196 are CFPs
- 123 are RIAs
- Members reside in Salem, Mid-Willamette Valley, Portland Metro area and SW Washington.

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.

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

2019 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. Please see below for a full list of what we offer at each of our signature events.

SPRING FINANCIAL FORUM - MARCH 14, 2019		
Multnomah Athletic Club Portland, Oregon Attendance: 100-150	PLATINUM \$5,000 (3 available)	GOLD \$1,500 (17 available)
50 Minute CE Presentation	●	
5 Minute Podium Introduction about your company	●	
Registration pass to all 2019 events	●	
Reception drink tickets to give to attendees	●	●
Signage with company logo	Featured	Alphabetical
Company recognition display board during event	Featured	Alphabetical
Exhibit booth	●	●
Logo on all promotional materials	●	●
Complimentary registration for Spring Financial Forum	2	2
Attendee list (first and last name + company)	●	●
One complimentary registration for all other 2019 events	1	
FALL WEALTH MANAGEMENT STRATEGY DINNER – OCTOBER 2019		
Location: TBD Portland, Oregon Attendance: 50-75	PLATINUM \$3,000 (1 available)	GOLD \$1,000 (5 available)
Keynote Introduction	●	
Logo on all promotional materials	●	●
Website Presence	●	●
Attendee list (first and last name + company)	●	●
Signage with company logo	Featured	Alphabetical
Company recognition display board during event	Featured	Alphabetical
One complimentary registration for all other 2019 events	1	
MONTHLY MEETINGS (8 MEETINGS – 3RD WEDNESDAY OF EACH MONTH)		
Multnomah Athletic Club Portland, Oregon Attendance: 40-80	PLATINUM \$2,000 (2 available)	GOLD \$1,000 (4 available)
Podium time – 3 minutes	4 Meetings	2 Meeting
Display table	4 Meetings	2 Meeting
Website Presence	●	●
Two complimentary registrations for selected sponsored meetings	2	2

FPA of Oregon & S.W. Washington - 2019 Sponsorship Opportunities

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

Contact Person: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

1 SPRING FINANCIAL FORUM - MARCH 14, 2019

Platinum Sponsor \$5,000

Gold Sponsor \$1,500

1 Total \$ _____

2 FALL WEALTH MANAGEMENT STRATEGY DINNER – OCTOBER 2019

Platinum Sponsor \$3,000

Gold Sponsor \$1,000

2 Total \$ _____

3 MONTHLY MEETINGS

Platinum Sponsor \$2,000

Gold Sponsor \$1,000

3 Total \$ _____

1+2+3 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 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: _____ CVV: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

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