

**FPA of San Antonio & South Texas
Corporate Sponsor Benefits**

(P) Platinum / **(G)** Gold / **(S)** Silver / **(B)** Bronze

Platinum Sponsor / Gold Sponsor / Silver Sponsor / Bronze Sponsor

1. Platinum – 5 minute presenting sponsor spotlight presentation at the 2012 Symposium luncheon and 1 sponsor spotlight at a FPA of SA&ST Chapter Meeting Luncheon.
2. Platinum - Keynote speaker – presenting sponsor at the 2012 FPA of SA&ST Symposium.
 - Keynote speaker will be scheduled at the discretion of the FPA of SA&ST Symposium Director and will be the opening, mid-day, or closing keynote – this is based on the overall speaker line-up and speakers travel needs.
 - Keynote speaker must be a nationally recognized speaker
 - Keynote speaker will speak for 50-90 minutes, dependent upon overall agenda
 - As the presenting symposium sponsor, your company logo will be included on all promotional event materials, website, blast emails and signage.
3. Symposium with premium location-taking advantage of highest flow of participant traffic. **(P) (G)**
4. *Co-sponsoring of major events – Networking Happy Hour, Regular Chapter Meetings, Financial Planning Day. **(P) (G)**
5. A 50 minute educational speaker at one 2012 FPA of SA&ST Chapter luncheon meeting. **(P)**
 - Speaker will be scheduled at the discretion of the FPA of SA&ST Education Director - this is based on the overall speaker line-up for the year & speakers travel needs
 - The topic must be a timely, relevant and advanced educational topic and must be CE approvable
 - Speaker will speak for 50 minutes

6. A ten (10) minute Chapter meeting sponsor spotlight/commercial presentation. **(P)**
7. Advertising – a \$710.00 value on two (2) full page ads for Symposium **(P)**; \$360.00 value on one (1) full page ad for Symposium **(G)**; a \$180.00 value on one-half (1/2) page ad for Symposium **(S)**; a \$90.00 value on one-fourth (1/4) page ad for Symposium **(B)**.
8. Table exhibit at all eleven (11) Chapter meetings – table reservations required. **(P)(G)(S)**
9. Host/Sponsor a study group/case study session in 2012. Sponsor will be responsible for providing venue, speaker, refreshments, and CE credits – FPA of SA&ST will market and promote to all members to increase visibility and attendance. FPA can also assist with CE credits if necessary. Coordinate through Birdie Sanchez at execdir@fpasatx.org. The date will be subject to availability based on events already scheduled. Schedule your date early to ensure your choice of dates. **(P) (G) (S) (B)**
10. Two (2) blast emails to the FPA of SA&ST membership per year. **(P)**
11. Website listing of sponsor company hosted webinars, events, and conferences (link to your website) for a full year. **(P)**
12. Symposium exhibit – April 19, 2012 (non-premium location). **(S) (B)**
13. One (1) representative may attend FPA Chapter luncheons at no cost; may bring a plus one (1) at member price. **(P) (G)**
14. Website listing (with link to your website) for a full year. **(P) (G) (S) (B)**
15. DUE DILIGENCE TERMS & CONDITIONS: All perspective corporate sponsors will be subject to a due diligence review and must currently be and remain in good standing with any and all industry regulating agencies (e.g. FINRA, BBB, etc.)

* Each major event has limited sponsor slots available and will be assigned on a first come first serve basis

2012 Letter of Agreement for FPA of SA&ST Corporate Sponsors

The undersigned party (herein after "Sponsor") hereby applies to become a Corporate Sponsor of the FPA of SA&ST Chapter under the terms of the "Corporate Sponsor Program" (herein after "Program") for the current sponsorship year. If Sponsor is accepted to the Program, Sponsor further agrees to a partnership contract term of one calendar year, payable upfront.

The FPA of SA&ST Chapter (herein after "FPA of SA&ST") strives to develop quality partnership relationships with sponsors who have a long-term interest in supporting the financial planning industry. Sponsor understands that Program has the ultimate right to refuse acceptance to any party without recourse in its pursuit of that goal.

So, in recognition of the relationship that the Program seeks to establish with its sponsors, the Program limits the number of sponsors in a given year. Furthermore, the qualified sponsors shall represent a cross-section of the industry. In most cases the invitation has been extended to only a few qualified sponsors in each business category.

Benefits will be based on the level of sponsorship selected by the sponsor.

DUE DILIGENCE TERMS & CONDITIONS:

All perspective corporate sponsors will be subject to a due diligence review and must currently be and remain in good standing with any and all industry regulating agencies (e.g. FINRA, BBB, etc.)

All levels do include exhibit space at the FPA of SA&ST Symposium which will be held on April 19, 2012.

Responsibilities of Sponsor will include:

- Payment of annual Corporate Sponsor fee (based on level selected).
- Active participation in the education of our membership on your company's products and services.
- Provide camera-ready material for your advertisement (JPG or PDF; and EPS format).
- Provide booth materials and set up at the annual FPA of SA&ST Financial Planning Symposium.
- Maintain good corporate citizenship and standing.

FPA of SA&ST may:

- At its sole discretion, accept, deny, non-renew, and/or terminate Sponsor.
- Schedule, reschedule, or cancel, at its discretion, meeting dates or presentations and will not be responsible for any Sponsor liabilities, financial or otherwise, arising from such actions.
- Change the Corporate Sponsor fee and/or prompt payment discount at renewal within a thirty (30) day notice.

Continued...



2012 Letter of Agreement for FPA of SA&ST Corporate Sponsors

Sponsor agrees to the above terms, and hereby applies for a partnership with the FPA SA&ST in the Program on the _____ day of _____, 20__.

Signed by:

Signature _____ Date _____
Printed Name _____ Company Name _____
Address, City, State, and Zip _____
Phone _____ Fax _____
E-mail _____
Website (to be linked to FPA of SA&ST website) _____

* If you are a new FPA of SA&ST Corporate Sponsor, or if you are an existing Sponsor and your logo has changed, please send your company logo to Birdie Sanchez, Chapter Executive Director at execdir@fpasatx.org in JPG or GIF format.

* If the information to be listed on the FPA of SA&ST website is different from above, please include how you would like the website listing to read below. If the contact information above is how you would like to be listed on the website please leave blank.

Printed Name _____ Company Name _____
Address, City, State, and Zip _____
Phone _____ Fax _____

Fax this page, the benefit selection sheet for your level of sponsorship (Platinum, Gold, Silver, or Bronze), along with the Sponsorship Invoice to 210.822.6600

**FPA OF SA&ST PLATINUM SPONSOR EXPLANATION OF BENEFITS
AND BENEFIT SELECTION SHEET**

Will you require exhibit space at the FPA of SA&ST Financial Planning Symposium to be held on April 19, 2012?

Yes No

Keynote Speaker at Symposium – April 19, 2012. This will be coordinated through FPA of SA&ST to ensure the best fit and topic for this event. The final topic and speaker approval are at the sole discretion of FPA of SA&ST. The speaker must be a nationally recognized name and the topic should appeal to a broad audience. The time slot for the keynote speaker will also be at the sole discretion of FPA of SA&ST and will be either the opening keynote, mid-day keynote or closing keynote – this is based on the overall speaker line-up and speakers travel needs. **See speaker guideline requirements on Page 12.**

Select a date for your ten (10) minute sponsor spotlight at an FPA of SA&ST Chapter meeting from the following 2012 dates. Dates are on a first come first serve basis (limit of 1 per date) – please add “1” to your first choice and “2” to your second choice. Dates are subject to change with notice.

January 25___ February 22___ March 28___ April 25___ May 23___ June 27___ July 25___
August 22___ September 26___ October 24___ November 28___

Select an event that you would like to co-sponsor. This is included in your sponsorship fee. Events are based on a first come, first serve basis:

Networking Happy Hour ___ Regular Chapter Meeting ___ Financial Planning Day___

A 50 minute educational speaker at one (1) 2012 FPA of SA&ST Chapter luncheon meeting

Platinum Sponsors also receive:

- Exclusive prime booth placement
- Two (2) full page ads in the FPA of SA&ST Symposium brochure
- Materials and logo promotion listing your company as the presenting sponsor
- Five (5) minute sponsor spotlight at the symposium luncheon
- **Two (2) blast emails per year
- Website listing of sponsor company hosted webinars, events, and conferences (link to your website) for a full year
- Chapter meeting exhibit space (11 meetings per year)
- Invitation to attend all FPA of SA&ST events
- Chapter demographic report & membership list
- Host/Sponsor a study group/case session
- One (1) representative may attend FPA Chapter luncheons at no cost. May bring a plus-one (1) at member price.
- Website listing (with link to your website) for a full year.

****See the Deadlines & Specs for Emails and Advertising for details on blast emails and article specs on Page 11.**

Birdie Sanchez, Chapter Executive Director, will assist you with your benefits requests and/or scheduling. execdir@fpasatx.org / 210.822.6600

FPA OF SA&ST GOLD SPONSOR BENEFIT SELECTION SHEET

Sponsor Benefits:

Will you require exhibit space at the FPA of SA&ST Financial Planning Symposium to be held on April 19, 2012?

Yes No

Select an event that you would like to co-sponsor. This is included in your sponsorship fee. Events are based on a first come, first serve basis based on availability.

Networking Happy Hour ____ Regular Chapter Meeting ____

Select a date to do a five (5) minute sponsor spotlight at an FPA of SA&ST Chapter meeting. Dates are subject to availability. Please indicate your first, second and third choice.

January 25____ February 22____ March 28____ April 25____ May 23 ____ June 27____ July 25____
August 22____ September 26____ October 24____ November 28____

A 50 minute educational speaker at one (1) 2012 FPA of SA&ST Chapter luncheon meeting

Gold Sponsors also receive:

- Symposium booth with premium location placement
- One (1) full page ad in the FPA of SA&ST Symposium brochure
- Chapter meeting exhibit space (11 meetings per year)
- *One (1) blast emails per year
- Invitation to attend all FPA of SA&ST events
- Chapter demographic report & membership list
- Host/Sponsor a study group/case session
- One (1) representative may attend FPA Chapter luncheons at no cost. May bring a plus-one (1) at member price.
- Website listing (with link to your website) for a full year.

****See the Deadlines & Specs for Emails and Advertising for details on blast emails and article specs on Page 11.**

Birdie Sanchez, Chapter Executive Director, will assist you with your benefits requests and/or scheduling. execdir@fpasatx.org / 210.822.6600

FPA OF SA&ST TOTE BAG SPONSOR BENEFIT SELECTION SHEET

SOLD

Sponsor Benefits:

Will you require exhibit space at the FPA of SA&ST Financial Planning Symposium to be held on April 19, 2012?

Yes No

Select an event that you would like to co-sponsor. This is included in your sponsorship fee. Events are based on a first come, first serve basis based on availability.

Networking Happy Hour ____ Regular Chapter Meeting ____

Select a date to do a five (5) minute sponsor spotlight at an FPA of SA&ST Chapter meeting. Dates are subject to availability. Please indicate your first, second and third choice.

January 25__ February 22__ March 28__ April 25__ May 23__ June 27__ July 25__
August 22__ September 26__ October 24__ November 28__

A 50 minute educational speaker at one (1) 2012 FPA of SA&ST Chapter luncheon meeting

Tote Bag Sponsor also receives: (Benefits are the same as the Gold Level)

- Symposium booth with premium location placement
- One (1) full page ad in the FPA of SA&ST Symposium brochure
- Chapter meeting exhibit space (11 meetings per year)
- *One (1) blast emails per year
- Invitation to attend all FPA of SA&ST events
- Chapter demographic report & membership list
- Host/Sponsor a study group/case session
- One (1) representative may attend FPA Chapter luncheons at no cost. May bring a plus-one (1) at member price.
- Website listing (with link to your website) for a full year.

****See the Deadlines & Specs for Emails and Advertising for details on blast emails and article specs on Page 11.**

Birdie Sanchez, Chapter Executive Director, will assist you with your benefits requests and/or scheduling. execdir@fpasatx.org / 210.822.6600

FPA OF SA&ST SILVER SPONSOR BENEFIT SELECTION SHEET

Sponsor Benefits:

Will you require exhibit space at the FPA of SA&ST Financial Planning Symposium to be held on April 19, 2012?

Yes No

Select a date to do a two (2) minute sponsor spotlight at an FPA of SA&ST Chapter meeting. Dates are subject to availability. Please indicate your first, second and third choice.

January 25___ February 22___ March 28___ April 25___ May 23 ___ June 27___ July 25___
August 22___ September 26___ October 24___ November 28___

Silver Sponsors also receive:

- Symposium booth placement (non-premium location)
- One-half (1/2) page ad in the FPA of SA&ST Symposium brochure
- Chapter meeting exhibit space (11 meetings per year)
- Host/Sponsor a study group/case session
- One (1) representative may attend FPA Chapter luncheons at member price. May bring a plus-one (1) at member price.
- Website listing (with link to your website) for a full year.

Birdie Sanchez, Chapter Executive Director, will assist you with your benefits requests and/or scheduling. execdir@fpasatx.org / 210.822.6600

FPA OF SA&ST BRONZE SPONSOR BENEFIT SELECTION SHEET

Will you require exhibit space at the FPA of SA&ST Financial Planning Symposium to be held on April 19, 2012?

Yes No

We will limit this level to the first five (5) Bronze that apply. Bronze sponsors that apply after we have reached our maximum of five (5) may be added to a waiting list or can upgrade to a higher level for 2012.

Silver Sponsors also receive:

- Symposium booth placement (non-premium location)
- One-fourth (1/4) page ad in the FPA of SA&ST Symposium brochure
- Host/Sponsor a study group/case session
- One (1) representative may attend FPA Chapter luncheons at member price. May bring a plus-one (1) at member price.
- Website listing (with link to your website) for a full year.

Birdie Sanchez, Chapter Executive Director, will assist you with your benefits requests and/or scheduling. execdir@fpasatx.org / 210.822.6600

FPA OF SA&ST FOLDER/NOTEPAD SPONSOR BENEFIT SELECTION SHEET

SOLD

Will you require exhibit space at the FPA of SA&ST Financial Planning Symposium to be held on April 19, 2012?

Yes No

We will limit this level to the first five (5) Bronze that apply. Bronze sponsors that apply after we have reached our maximum of five (5) may be added to a waiting list or can upgrade to a higher level for 2012.

Folder/Notepad Sponsors also receive:

- Symposium booth placement (non-premium location)
- One-fourth (1/4) page ad in the FPA of SA&ST Symposium brochure
- Host/Sponsor a study group/case session
- One (1) representative may attend FPA Chapter luncheons at member price. May bring a plus-one (1) at member price.
- Website listing (with link to your website) for a full year.

Birdie Sanchez, Chapter Executive Director, will assist you with your benefits requests and/or scheduling. execdir@fpasatx.org / 210.822.6600

Deadlines & Specs for Emails and Advertising

Broadcast E-Mails to FPA of SA&ST Membership:

The email should be sent to the FPA of SA&ST office (execdir@fpasatx.org) via email and in an HTML format. The email can include any content of your choice, including graphics. Please specify if there are any special instructions, attachments, or if there is a specific date you would like for it to be sent.

The email will be sent out with you listed as the sender and recipients will see that it is coming directly from your email address. Please specify the email address you would like listed as the 'sender'.

Sponsor Company hosted webinars, events, conferences or meetings FPA of SA&ST will have a page on our website where sponsors can have any company hosted Webinar, event, conference or meeting listed along with details (150 word maximum) and links to the event and/or registration page. This will give you great exposure to any local events you may host and/or webinar's that you would like to make the SA&ST membership aware of.

To utilize this benefit:

Send the details (150 words maximum), event date and any links you would like to use to execdir@fpasatx.org. The content should be in a format that we can copy and paste directly onto the web page. If you send a PDF we will only be able to add the name of the event with a link to the PDF document only. Once the event date passes the event will be removed from the web page so that we may keep it current. There is no limit on the number of events you can post. Following is an example of an event listing.

Topic

Hosted by: Sponsor Name

Date/Time

Brief description of event, including speakers names if possible.

Dial In: (111) 111-1111 **Passcode:** 111111

CE: if applicable

Link to register for or join the meeting

Cost: \$___

Event website – if applicable

FPA OF SAN ANTONIO & SOUTH TEXAS SPEAKER GUIDELINES

The following guidelines apply to all Platinum Corporate Sponsors who will be providing a 50 minute educational speakers/topics for an FPA of SA&ST events during 2012.

- Promotional materials (speaker bio, topic, outline, etc.) are due to FPA of SA&ST no later than 45 days prior to the meeting date. If the content is late there will be a risk of losing your speaking spot as it will have to be filled with an outside speaker.
- A minimum of 2 speakers/topics is due to the FPA of SA&ST Education Director for consideration no later than 60 days prior to the meeting date. The topic will be chosen based on content and relevancy to the FPA of SA&ST audience. **The presenting speaker must be a high-profile name that is recognized on the speaker circuit.**
- Topics and outlines must be CFP CE credit eligible when at all possible. FPA of SA&ST will file for all CE credits.
- The topic and CE credits are the key element to attendance numbers at our Chapter events. Sponsors are asked and encouraged to submit their best speakers for the best results and attendance numbers. An impressive speaker reflects well on the sponsoring company.
- Speakers will have 50 total minutes to talk, we request the topic be covered in 40-45 minutes and we will then have 5 to 10 minutes for Q&A.
- We would like to have a short introduction/bio provided by the sponsor to be used by the President or the Director of Education to introduce the speaker.

The person working with you on this benefit for 2012 will be: Allan Riggs, Secretary (210) 349-8517 ariggs@swmria.com



2012 FPA OF SAN ANTONIO & SOUTH TEXAS CORPORATE SPONSORSHIP INVOICE

CONTRACT STARTING DATE	CONTRACT ENDING DATE	TERMS
01/01/12	12/31/12	Fee must accompany signed Contract

Selected Level	Description	Price	Total
	Platinum Sponsorship	2,500.00	\$ _____
	Gold Sponsorship	1,000.00	\$ _____
	Tote Bag Sponsorship	1,000.00 SOLD	\$ _____
	Silver Sponsorship	750.00	\$ _____
	Bronze Sponsorship	500.00	\$ _____
	Folder/Notepad Sponsorship	500.00 SOLD	\$ _____

Total Due \$ _____

Will pay by check (due within 10 days)

Mail to: FPA of San Antonio & South Texas, P.O. Box 34036, San Antonio, Texas 78265
 Payable to: FPA of San Antonio & South Texas

Please charge my credit card for the total amount due: \$ _____

CC# _____ Exp. Date: _____

CDC Code: _____ Name on card: _____

Address where the credit card statement is mailed to: _____

Thank you for your participation in our Corporate Sponsorship Program.
 We look forward to working with you during the coming year.

BENEFITS AT A GLANCE – 2012

	BENEFITS	Value	Platinum (P)	Gold (G)	Silver (S)	Bronze (B)
1	Premium exhibit space at 2012 Symposium (P) (G) Booth placement at 2012 Symposium (S) (B)		•	•	•	•
2	Keynote Speaker – presenting sponsor at 2012 Symposium	\$2,000	•			
3	Two (2) full page ads for 2012 Symposium (P) One (1) full page ad for 2012 Symposium (G) One-half (1/2) page ad for 2012 Symposium (S) One-fourth (1/4) page ad for 2012 Symposium (B)	\$710 \$360 \$180 \$90	•	•	•	•
4	Materials and logo promotion listing company as the 2012 Symposium presenting sponsor (P)	\$2,000	•			
5	Five (5) min. sponsor spotlight presentation at the 2012 Symposium & one (1) Chapter Luncheon event	\$300	•			
6	Website listing of Sponsor company hosted webinars, events & conference listings on FPA Website for a full year (links)	\$300	•			
7	Website listing (with link to company website) one full year	\$250	•	•	•	•
8	Two(2) blast emails per year (P) One(1) blast email per year (G)	\$300	•	•		
9	Co-Sponsor Event	\$300	•	•		
10	A 50 min. educational speaker at a 2012 Chapter Luncheon event	\$250	•			
11	A 10 min. sponsor spotlight presentation at a 2012 Chapter Luncheon event (P) A 5 min. sponsor spotlight presentation at a 2012 Chapter Luncheon event (G) A 2 min. sponsor spotlight presentation at a 2012 Chapter Luncheon event (S)	\$250	•	•	•	
12	Chapter Luncheon Exhibit (11 x \$150)	\$1,650	2 sponsors per mtg.	1 sponsor per mtg.	1 sponsor per mtg.	1 sponsor per mtg.
13	Host/Sponsor a study group/ case session 2012	\$250	•	•	•	•
14	Chapter demographic report & membership list	\$\$\$\$	•	•		
15	One (1) rep. may attend Chapter luncheons at no cost. May bring a plus-one at member price	\$175	•	•	•	•