

Chapter Resource Partner Opportunities

The Financial Planning Association of Puget Sound (FPA of Puget Sound) is one of the nation's largest and most preeminent organizations for financial planning professionals. FPA of Puget Sound members span from south of Olympia to the Canadian Border and east to the Tri-Cities.

FPA of Puget Sound is among the very elite group of local chapters, achieving prestigious awards each year from the Financial Planning Association, one of the largest most active financial advisor groups in the country with over 27,000 members and over 90 active local chapters.

FPA of Puget Sound chapter meetings consist of members who are independent Certified Financial Planners® and financial planning professionals in the Puget Sound area. Our newsletters and meeting notices go out to more than 400 FPA of Puget Sound members and over 900 prospects throughout the region. So when you partner with FPA of Puget Sound -- your message is reaching out to the financial planning community.

How to Make the Most of Your Partnership Investment:

- Attend every chapter meeting to be acknowledged as a sponsor
- Get to meetings early to network with your target audience
- Follow up on members you meet in person for an informational session
- Use the mailing labels to contact the membership
- Keep a well-stocked supply of fresh, current literature with the Executive Director
- Attend the annual Chapter Resource Partner round table with the Board of Directors.

Why Choose FPA of Puget Sound as Your Resource Partner?

Membership Loyalty

20 plus years 52%
15-20 years 7%
10-15 years 18%
10-5 years 27%
Less than 5 years 37%

Professional Designations

CFP – 73%
CPA – 8%
ChFC – 8 %
CLU – 8 %
Other – 8%

Generations of Members

57% - Baby Boomers (1940-1960)
34% - Generation X (1961-1980)
9% - Generation Y (1981-1990)

- The financial planning profession is listed on the top twenty professions of the future.
- Expected growth for the financial planning profession is 20% between 2008 and 2018.
- 77% of FPA members are in an executive position at their practice (*includes list above and managers, directors and vice presidents*).

Additional Sponsorship Opportunities

Ethics Meeting..... \$2500.00
Symposium Session Speaker..... \$2000.00
Social Cruise Sponsorship..... TBD

Key FPA of Puget Sound 2011 Dates

2011 Symposium - January 28, 2011
Chapter Meetings Projected for March, May, June, September and November (Ethics)

2011 Partnership Benefits At A Glance

Benefits	Platinum Partner \$4500	Gold Partner \$3000	Silver Partner \$1000
Monthly Meetings <ul style="list-style-type: none"> • One 30 minute presentation at an education event • Sponsor logo and contact information on program handouts • Receive one copy of attendees list • Exhibit table at 2 education luncheons • Distribute brochures/research at all attendee seats • Firm logo/ad presented all screen at all meetings • One representatives at all meetings - meals included 	<ul style="list-style-type: none"> ■ ■ ■ ■ ■ ■ ■ 	<ul style="list-style-type: none"> ■ ■ ■ ■ ■ ■ ■ 	<ul style="list-style-type: none"> ■ ■ ■
Annual Symposium <ul style="list-style-type: none"> • Priority/reserved booths at the Symposium • 50 minute (CE) presentation at the January Symposium • Marketing insert in attendee symposium notebook • Firm logo/ad presented on screen • Two representatives at all symposium activities • Exhibit Table • Receive one copy of attendees list 	<ul style="list-style-type: none"> ■ ■ ■ ■ ■ ■ ■ 	<ul style="list-style-type: none"> ■ ■ ■ ■ ■ ■ 	<ul style="list-style-type: none"> ■ ■ ■ ■
Membership Correspondence <ul style="list-style-type: none"> • Display of one Partner event on chapter calendar per month • One membership email blast subject to FCC Rules • Firm's name/logo and website link on website • Receive all email announcements sent to membership • One set of membership mailing labels • Receive on copy of monthly newsletter by email 	<ul style="list-style-type: none"> ■ ■ ■ ■ ■ ■ 	<ul style="list-style-type: none"> ■ ■ ■ ■ ■ 	<ul style="list-style-type: none"> ■ ■ ■ ■
Newsletter <ul style="list-style-type: none"> • One featured education article in bi-monthly newsletter (pdf) • Company logo and representative listed in each newsletter 	<ul style="list-style-type: none"> ■ ■ 	<ul style="list-style-type: none"> ■ 	<ul style="list-style-type: none"> ■

Unique Sponsorship Opportunities

Ethics Meeting Sponsorship - \$2500

The largest FPA of Puget Sound educational event of the year. Sponsors will have the opportunity to give a 15 minute presentation, place literature on all attendees seats, receive one copy of attendee list, and have two company representatives at the event.

Social Cruise Sponsorship - Please contact us for current pricing information.

Cruise the Puget Sound Region with a captive audience. Share the day with FPA of Puget Sound members, network with financial planners and form trusted relationships with clients who will benefit from your products and services. The cruise is usually scheduled for the month of August.

Luncheon Sponsorship - \$2500

One 50 minute CE presentation at a educational meeting.

IF YOU WOULD LIKE TO DISCUSS PARTNER OPPORTUNITIES IN GREATER DETAIL, PLEASE CONTACT BHAJ TOWNSEND, AT 425-827-5371 OR CINDY BYFIELD AT 206-686-4372 OR CINDY@FPAPUGETSOUND.ORG.

ALL PARTNERSHIP PACKAGES ARE BASED ON THE 2011 CALENDAR YEAR FPA OF PUGET SOUND RESERVES THE RIGHT TO REQUIRE ALL MEMBERSHIP LITERATURE, CORRESPONDENCE AND AD SUBMISSIONS TO CONFORM TO OUR POLICIES AND FORMAT REGULATIONS.