

# Financial Planning Association of Georgia

**PARTNERSHIP** Opportunities

## 2020



# About FPA of Georgia

Thank you for your interest in becoming a Partner. We exist to support, promote and empower the financial planning community of Georgia. Our partnership program is designed to provide an opportunity for a select group of industry-leading firms to interact with our members during educational meetings, socials and community outreach activities.

The Georgia chapter has over 550 dedicated member professionals who serve consumers and their communities throughout the state. Attendance at our Quarterly meetings average between 75-100 members and our Regional Symposium averages 150-200 members.

Approximately half of our members work for RIA's and 2/3 of our members are RIA's or Hybrid.

Our members are financial planners, accountants, real estate planners, faculty, family wealth counselors, students, brokers, insurance professionals, brokers, and investment managers from all over Georgia.

Much of the success and growth FPA of Georgia has experienced is a direct result of the support and financial commitment from our partners. The financial support from our partners help us to provide speakers, special activities, socials, retain facilities, and community outreach efforts that will attract today and tomorrow's top financial planning professionals.

Your financial support for the FPA of Georgia will be rewarded throughout the year with a variety of opportunities to gain direct recognition for your business, the services you provide and opportunities for face-to-face discussions with decision makers. Depending upon the level of partnership you select, you will have numerous occasions to establish new contacts and nurture existing relationships.

Visit our website at [www.fpagea.org](http://www.fpagea.org) for information on our mission and vision, as well as detailed information on committee strategies and planned activities. The Financial Planning Association (FPA®) is a national organization with nearly 30,000 financial planning members and 85 chapters located across the country. As members join the FPA®, they join at the national level and automatically become a member of our local chapter. Visit our calendar where you can learn about the many outreach programs and events our members participate in throughout the year and join us, especially during Financial Literacy Month and Financial Planning Week.

The Georgia chapter has consistently been selected and awarded "Gold Status" in the Road Map to Success program. Georgia has held this status for several years and continues to strive for this chapter recognition award! Each year chapters across the country participate in this National FPA® chapter recognition program.

Best,

Malik Lee, CFP®, CAP®, APMA®  
FPA of GA President 2020

If you have additional questions about becoming a partner with FPA of Georgia, please feel free to contact:

- Monica Holaway, FPA of GA Chapter Administrator, (770) 516-8322 [admin@fpagea.org](mailto:admin@fpagea.org)
- Completed partnership agreements can be emailed to [admin@fpagea.org](mailto:admin@fpagea.org) or faxed to (770) 516-0236.

**FINANCIAL PLANNING  
ASSOCIATION**  
OF GEORGIA

**FPA**  
FINANCIAL  
PLANNING  
ASSOCIATION

**MEMBERS: 550**

**CHAPTER MEMBERSHIP BY  
FIRM REGISTRATION TYPE:**



Approximately half of our members work for RIA's and 2/3 of our members are RIA's or Hybrid.



Average length of Membership is 10 years.

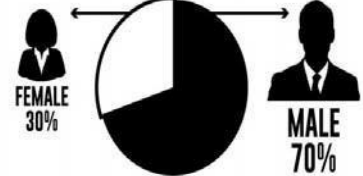


**28%+** have been members for less than 2 years.

**CERTIFIED FINANCIAL  
PLANNERS:**



**76%** of Chapter Members hold the CFP® Designation



**Meeting Attendance**

**QUARTERLY MEETINGS:**

Average attendance of Members:

**50** **80**



Average attendance of Members: **150+**

**MAY 8, 2020**

**ANNUAL  
REGIONAL  
SYMPOSIUM**

\* non-affiliated members (i.e. academic faculty and students, non-registered members and incomplete member information)

# FPA OF GEORGIA PARTNERSHIP OPPORTUNITIES

BENEFITS	PREMIER	PLATINUM	FINTECH	GOLD	SILVER	BRONZE
Regional Symposium Tickets	4	4	3	3	2	2
Exhibition space	Single	Single	Single	Single	Single	
Symposium program & on-site signage	Premier	Logo	Listing	Listing	Listing	Listing
Symposium attendee list (pre-and post-conference)	•	•	•	•		
Symposium keynote speaker introduction	•	•				
<b>New!</b> Symposium Breakout speaker introduction, including 5 min. additional time & marketing materials	•					
<b>New!</b> 10-minute Demo During Scheduled Breakouts			•			
<i>Other Benefits</i>						
Introduce Speaker at Quarterly			2	2	1	
Electronic spreadsheet of members	Quarterly	One-Time				
Annual pass to all Quarterly	4	2	1	1		
Choice of Additional Events: Educational,	4	2	1	1		
Before December 31st- Save More	\$6,500	\$4,500	\$3,150	\$2,250	\$1,575	\$1,125
After December 31st	\$7,000	\$5,000	\$3,500	\$2,500	\$1,750	\$1,250

## Additional Opportunities

**\$1,250: Nametag Holder sponsorship:** Includes name and company logo on nametag holders, recognition on all event signage and in program

**\$750: Post Conference Reception (Max 2):** Includes special signage at reception, 2 attendee tickets and page in program

**\$500 each: Breakfast, Lunch (Max 2):** Includes special signage

**\$300: Break Sponsor:** Includes special signage at break area and recognition in program

*\*does not include email addresses*

# PARTNERSHIP Opportunities

## PREMIER - \$7,000 – Only One Available!

Pay by December 31<sup>st</sup> to receive a discount of 10%

Regional Symposium:

- Provide 1 Keynote Speaker at event
- 5 additional minutes podium time at event
- 4 tickets for attendees
- Premium Signage & Program Recognition
- Brochure/Flyer/Handout placed in General session room
- Symposium attendee list (pre- and post-conference)

Additional:

- Logo, Link and video (company provided) on FPAGA website
- Four (4) Annual passes to all quarterly meetings
- Attendee list from 2 quarterly meetings
- Electronic spreadsheet of membership (quarterly)
- Your choice of 4 additional sponsorships

## PLATINUM - \$5,000

Pay by December 31<sup>st</sup> to receive a discount of 10%

Regional Symposium:

- 4 tickets for attendees
- Signage & Program Recognition
- Keynote speaker introduction
- Symposium attendee list (pre- and post-conference)

Additional:

- Introduce Speaker & 5 minutes of podium time at (1) Meeting
- Logo, Link (company provided) on FPAGA website
- Two (2) Annual passes to all quarterly meetings
- Attendee list from 2 quarterly meetings
- Electronic spreadsheet of membership (one time)
- Your choice of 2 additional sponsorships

## FINTECH Demo - \$3,500 – Only Five Available!

Pay by December 31<sup>st</sup> to receive a discount of 10% Regional Symposium:

- 3 tickets for attendees
- Logo in the program and on signage
- Company logo on FPAGA website
- Symposium attendee list (pre- and post-conference)
- 10 minutes at Symposium to showcase products

Additional:

- Company recognized on FPA GA website with link
- One (1) Annual quarterly meeting pass
- Your choice of 1 additional sponsorship event from: Educational Events or member socials

# PARTNERSHIP Opportunities

## GOLD - \$2,500

Pay by December 31<sup>st</sup> to receive a discount of 10%

Regional Symposium:

- 3 tickets for attendees
- Logo in the program and on signage
- Company logo on FPAGA website
- Symposium attendee list ((pre- and post-conference)

Additional:

- Company recognized on FPA GA website with link
- One (1) Annual quarterly meeting pass
- Your choice of 1 additional sponsorship event from: Educational Events or member socials

## SILVER - \$1,750

Regional Symposium

- 2 tickets for attendees
- Listing in the program and on signage
- Company name on FPAGA website
- Company name on Regional Symposium marketing and emails

## BRONZE - \$1,250

Regional Symposium

- 2 tickets for attendees
- Listing in the program

***New! Multiyear partnerships. Sign on to sponsor for 2 or 3 years and receive a 5% discount on your package! Contact us for more information!***

**\$1,000: Includes your Choice of 2 Events**

**\$500: Includes your Choice of 1 Event**

***Events Include: Quarterly Meetings, Career Day, Advocacy Day, Networking Events, Member Socials, Pro Bono and More!***

# FPA of Georgia 2020 Partnership Agreement



## Company Information

Please print

Date

Company Name (as it should appear for recognition)

Contact Name

Title

Company Address

City

State/Zip

Telephone

Email

Website

## Payment Information

- Check (Please make check payable to FPA of Georgia)
- MC / VISA / Discover
- American Express

Card Number

Expiration Date

Name as it appears on card

Cardholder's Signature

## Partnership Level

- \$7,000 – Premier Partnership
- \$5,000 – Platinum Partnership
- \$3,500 – FinTech Demo
- \$2,500 – Gold Partnership
- \$1,750 – Silver Partnership
- \$1,250 – Bronze Partnership

## Additional Opportunities

- \$1,500 – Registration Sponsor
- \$1,250 – Nametag Sponsor
- \$1,000 – Chapter Supporter (2)  
*Meetings and Events must be selected in advance. Please see selection sheet.*
- \$500 – Chapter Supporter (1)  
*Meetings and Events must be selected in advance. Please see selection sheet.*
- \$750 – Regional Symposium Reception (limit 2 partners)
- \$300 – Regional Symposium Break
- \$500 – Regional Symposium Breakfast or Lunch (limit 2 partners)

\$ \_\_\_\_\_  
Total Payment

Mail checks to FPA of Georgia  
3227 S. Cherokee Lane, Ste. 1320  
Woodstock, GA 30188  
Scan and email: admin@fpaga.org  
Fax form to: 770-516-0236

***New! Multiyear partnerships. Sign on to sponsor for 2 or 3 years and receive a 5% discount on your package! Contact us for more information!***

***Opportunities are first come, first serve***



## Meetings and Events

### Regional Symposium (150-250 attendees)

Location: Cobb Galleria Center | 8:00 a.m. - 4:00 p.m. | Date: May 8, 2020

### Quarterly Meetings (75-100 attendees)

Location: Maggiano's Cumberland | 7:30 a.m. until 9:45 a.m.

Dates Available: January 24, 2020 | July 24, 2020 | October 23, 2020

- Partners listed on all pre-meeting promotional correspondence distributed to the FPAGA membership as well as scrolling presentation at all meetings
- Special signage at the meeting
- Display table provided at the meeting distribution of promotional materials and advertising
- Partner receives 2 full minutes of microphone time to promote company products and services (First come first served. Limit of 2 partners per meeting)

### Career Development/Next Gen (20-40 attendees)

Location: TBD | Time TBD

Dates Available: Feb 2020 | March 2020 | September 2020 | November 2020

- Partners listed on all pre-meeting promotional correspondence distributed to the FPAGA membership
- Special signage at the event
- Partner gets 5 full minutes of microphone time to promote company products and services. (First come first served. Limit of 1 partner per meeting)

### Member Socials and Events (20-40 attendees)

Location: TBD | Time TBD

Dates Available: April 2020 | June 2020 | September 2020

Each year FPAGA supports a special outing / event with high profile recognition for our Partners to build upon networking opportunities

- Partners listed on all pre-meeting promotional correspondence distributed to the FPAGA membership
- Special signage at the event

### Pro Bono Events (20-40 attendees)

Location: TBD | Time TBD

Dates Available: Feb 2020 | April 2020 | August 2020 | October 2020 | November 2020

FPAGA hosts and supports numerous volunteer opportunities throughout the year

- Partners listed on all pre-meeting promotional correspondence distributed to the FPAGA membership and listed on event signage



*All Event Dates are First Come, First Served*

### *Quarterly Meeting Available Dates*

Location: Maggiano's Cumberland Time: 7:30 am until 9:45 am

January 24, 2020  July 24, 2020  October 23, 2020

### *Career Development Meeting Available Dates*

Location: TBD

February 2020  March 2020  September 2020  November 2020

### *Member Social Available Dates*

Location: TBD Time: TBD

April 2020  June 2020  September 2020

Contact Person \_\_\_\_\_ Date \_\_\_\_\_

Company \_\_\_\_\_ Website \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

*We have read the Rules and Regulations. We understand that this contract shall be legally binding between the Financial Planning Association of Georgia and the Exhibitor upon acceptance in writing by the Financial Planning Association of Georgia. We also understand that any change in the information in this contract must be made in writing.*

Please type or print all information. Fax to (770) 516-0236 or email to [admin@fpaga.org](mailto:admin@fpaga.org)