



## OF NORTHEAST OHIO

### 2021 Partnership Opportunities

#### Our Mission:

To be the primary organization in our community that promotes financial literacy, increases awareness of financial planning as a profession, and enhances the ability of our members to serve their clients with the fiduciary standard.

#### Benefits of Partnering with FPA/NEO:

Our association is supported by a number of exceptional partners who help offset the cost of delivering many benefits and member services. If you decide to partner with FPA NEO, you would help to lead FPA’s message of building the community of the financial planning profession through your commitment to the association, our mission, and our members. Our Platinum, Gold, and Silver packages offer you an excellent opportunity to be a valued partner of our chapter and to reap the rewards of establishing a strong relationship with a premier financial planning organization.

**Due to the COVID-19 pandemic many of our regular chapter events and activities were cancelled or transitioned to virtual. In order to compensate for any lost benefits, the FPA NEO board is happy to offer a discount for all renewing partners for the 2021 programming year.** This information can be found on the following pages of this packet.

Our chapter has maintained its membership this past year and with nearly 300 financial professional members representing a broad spectrum of experience, education and specialties including financial planning, investment advisory and broker dealer services, as well as insurance & annuities products, banking, and legal accounting services.

FPA Membership Longevity		Professional Designations	
21+ years	17%	CFP®	69%
15-20 years	13%	CPA	12%
10-15 years	15%	ChFC	5%
5-10 years	11%	PFS	4%
> 5 years	43%	JD	2%

#### Making the Most of Your Partnership Investment:

- Attend all chapter events (virtual or in-person) to network with your target audience and be recognized as a valued supporter of our organization
- Provide potential speakers on technical topics for “CE” accreditation

FPA Northeast Ohio | 1120 Chester Avenue | Suite 470  
 Lauren Smigelski, Chapter Executive | Phone: (216) 298-9095 | [admin@fpa-neo.org](mailto:admin@fpa-neo.org)  
<http://chapters.onefpa.org/northeastohio/>

## 2021 Partnership Benefits At-A-Glance

Benefits	Platinum Partner \$3,500 (NEW) \$2,500 (RENEWAL)	Gold Partner \$2,500 (NEW) \$1,750 (RENEWAL)	Silver Partner \$1,500 (NEW) \$1,000 (RENEWAL)
<b>Virtual Education Events*</b> (actual number TBD, tentatively twice a month)			
5-minute presentation in advance of program	2 programs	1 program	
Company name listed on promotional materials and logo prominently displayed in advance of	✓	✓	✓
Complimentary registration for 2	✓	✓	✓
Attendee list provided on request	✓	✓	✓
<b>Annual Symposium</b> (tentatively scheduled for October 21, 2021)			
Prominent booth location	✓		
Reserved booth space for 2 people	✓	✓	✓
Company logo presented on-screen and listing in program	✓	✓	✓
Opportunity to sponsor breakout session and provide speaker (see below)	✓	✓	✓
Attendee list provided after event on request	✓	✓	✓
Admission for 2 people to Partnership Appreciation Event with Board of Director's following symposium	✓	✓	✓
<b>Membership Correspondence</b> (email communication sent to list of 1,000+)			
Display of your logo <b>with contact information</b> and link to your company on our chapter website	✓		
One set of membership mailing labels	✓		
Opportunity to send an email to membership list to promote events or services (via FPA NEO)	2 emails	1 email	
Delivery of upcoming programming topics with an opportunity to provide program content and speaker(s) (topics, content and speaker(s) to be approved by programming committee)	✓	✓	✓
Copy of membership list & demographic report	✓	✓	✓
Listed in 3 chapter newsletters and opportunity to provide article or ad in each newsletter	✓	✓	✓
Receive all of our chapter announcements via email	✓	✓	✓
Display of your logo and link to your company on our chapter website	✓	✓	✓
Complimentary job postings on our chapter	✓	✓	✓

**\*The FPA NEO Board of Directors has decided that, at the time of this release, our chapter events will be held virtually through at least the first half of the 2021 programming year.** The board is in regular communication and if it becomes safe and economically viable to meet again in person, additional and amended sponsorship benefits will be communicated.

## ***Partnership Terms Agreement***

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The undersigned party (herein after “Partner”) hereby applies to become a partner of the FPA of Northeast Ohio Chapter (herein after “FPA/NEO”) under the terms of the “Corporate Partnership Program” (herein after “Program”) for the current Partnership year. If Partner is accepted to the Program, Partner further agrees to a partnership contract term of one calendar year, payable upfront.

FPA/NEO strives to develop quality partnership relationships with sponsors who have a long-term interest in supporting the financial planning industry. Partner understands that Program has the ultimate right to refuse acceptance to any party without recourse in its pursuit of that goal.

In recognition of the relationship that the Program seeks to establish with its sponsors, the Program limits the number of Partners in a given year. Furthermore, the qualified Partners 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 level of Partnership selected by Partner.

### **DUE DILIGENCE TERMS & CONDITIONS:**

All prospective Partners 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.).

### ***Responsibilities of Partner will include:***

- Payment of annual Partnership fee (based on level selected)
- Active participation in the education of our membership
- Provide logo and contact information
- Provide representation, booth materials and set up at the annual symposium
- Maintain good corporate citizenship and standing

### ***Chapter may, at its sole discretion:***

- Accept, deny, non-renew, and/or terminate a Partner
- Accept or decline any Partner speaker offering if it does not meet CFP® continuing education requirements or fit within the chapter’s programming agenda
- Schedule, reschedule, or cancel meeting dates or presentations and will not be responsible for any Partner liabilities, financial or otherwise, arising from such actions
- Change the Partnership fee and/or prompt payment discount at renewal

## Partnership Commitment Form and Payment Information

Please return to [admin@fpa-neo.org](mailto:admin@fpa-neo.org) or fax to 216-696-2582 on or before **deadline of January 31, 2021**.

### **RENEWING Partnership:**

- Platinum Partner - \$2,500
- Gold Partner - \$1,750
- Silver Partner - \$1,000

### **NEW Partnership:**

- Platinum Partner - \$3,500
- Gold Partner - \$2,500
- Silver Partner - \$1,500

### **Partnership Add-On:**

- Symposium breakout session sponsor - \$1,500  
(limit of 3, subject to approval of programming committee)

Partner agrees to the above terms, and hereby applies for a Platinum / Gold / Silver (circle one) Partnership with FPA/NEO on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

Signature

Date

Partnering Company Name

Contact Name

Mailing Address, City, State, Zip

Email address

Phone

Website (to be linked to the FPA/NEO website)

Please send an invoice

Charge the credit card below

\*\*If you are a new Partner, or if you are an existing Partner and your company logo has changed, please send your current logo to Lauren Smigelski, Chapter Executive Director at [admin@fpa-neo.org](mailto:admin@fpa-neo.org) in JPG or GIF format.

### **Credit Card Information:**

Credit Card Number

Exp. Date

Credit Card Billing Address, City, State, Zip

**Thank you for your participation in our Partnership Program! We look forward to working with you!**