



2023 Partnership Opportunities

Our Mission:

The Financial Planning Association® (FPA®) is the leading membership organization for CERTIFIED FINANCIAL PLANNER™ professionals and those engaged in the financial planning process. FPA is your partner in planning by helping you realize your vision of professional fulfillment through **practice support, learning, advocacy, and networking.**

Benefits of Partnering with FPA/NEO:

Our association is supported by several 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.

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

21+ years	17%
15-20 years	13%
10-15 years	15%
5-10 years	11%
> 5 years	43%

Professional Designations

CFP®	69%
CPA	12%
ChFC	5%
PFS	4%
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

Financial Planning Association of Northeast Ohio
Lauren Smigelski, Chapter Executive
2001 Crocker Road, Suite 510 | Westlake, OH 44145
Phone: (216) 298-9095 | admin@fpa-neo.org | www.fpa-noe.org

2023 Partnership Benefits At-A-Glance

Benefits	Platinum Partner \$3,500	Gold Partner \$2,500	Silver Partner \$1,500
Education Events (7 total; scheduled for the 3 rd Thursday of the month)			
5-minute presentation in advance of program	2 programs	1 program	
Company name listed on all event promotional materials	✓	✓	
Logo presented on screen before program and during break	✓	✓	✓
Complimentary registration for 2	✓	✓	✓
Attendee list provided on request	✓	✓	✓
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)	✓	✓	✓
Membership Correspondence (email communication sent to list of 1,000+)			
Display of your logo with contact information 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	
Copy of membership list & demographic report	✓	✓	✓
Receive all our chapter announcements via email	✓	✓	✓
Display of your logo and link to your company on our chapter website	✓	✓	✓
Complimentary job postings on our chapter website	✓	✓	✓

Partnership Terms Agreement

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
- 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 or fax to 216-696-2582 on or before **deadline of January 31, 2023**.

Partnership Level:

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

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 at admin@fpa-neo.org in JPG or PNG 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!