



2024 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 will help to lead FPA's message of building the community of the financial planning profession. 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 continues to have a strong and engaged membership with nearly 270 financial professionals representing a broad spectrum of experience, education, and specialties including financial planning (70% of our members hold the CFP® designation), investment advisory and broker dealer services, as well as insurance & annuities products, banking, and legal accounting services.

Average Meeting Attendance

Monthly Education Meetings	55
Social Events	40
NexGen Gatherings	22

FPA Membership Longevity

21+ years	15%
15-20 years	11%
10-15 years	8%
5-10 years	25%

Making the Most of Your Partnership Investment:

- Attend all chapter events, educational and social, 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
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2024 Partnership Benefits At-A-Glance

Benefits	Platinum Partner \$3,750	Gold Partner \$2,750	Silver Partner \$1,750
Education and Social Events			
Education: 7 each year, typically scheduled for the morning on the 3 rd Thursday of the month Social: 3-4 each year, typically scheduled quarterly at various locations around Cleveland			
Listed as sponsor of all social events	✓		
5-minute presentation in advance of program	2 programs	1 program	
Company name listed on all event promotional materials	✓	✓	
Complimentary registration for 2	✓	✓	✓
Logo presented on screen before program and during break	✓	✓	✓
Attendee list provided on request	✓	✓	✓
Opportunity to provide program content and speaker(s) (topics, content and speaker(s) to be approved by programming committee)	✓	✓	✓
General Visibility and Membership Correspondence			
Display of your logo with contact information and link to your company on our chapter website	✓		
Opportunity to send an email to membership list to promote events or services (via FPA NEO to list of 1,000+)	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, 2024**.

Partnership Level:

- Platinum Partner - \$3,750
- Gold Partner - \$2,750
- Silver Partner - \$1,750

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)

PAYMENT

- Check included with paperwork
- Check in the mail
- I will [PAY ONLINE](#)

**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.

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