



## **2017 Resource Partner Program**

**Through Partnerships  
We Empower the Financial Planning Profession**



**2017 Symposium**  
**January 30 & 31, 2017**  
**Westin Lake Mary**  
**2974 International Parkway**  
**Lake Mary, Florida**

## ***Who are we?***

The **Financial Planning Association** is the leadership and advocacy organization dedicated to providing community and knowledge to those who provide, support, and benefit from professional financial planning. The FPA brings together all those who champion the financial planning process: financial planners, accountants, insurance professionals, attorneys and the public that is served by the FPA community. More than 28,000 members are as professionally diverse as the financial services landscape.

## **It is our mission to:**

- Provide our members with programs and services that support and enhance their professional development;
- Encourage and assist our members in achieving the CFP® designation; and
- Promote the value of financial planning and the financial planning profession to the public.

## ***Why become a Partner?***

As a business professional, you recognize the importance of building existing relationships and cultivating new relationships. By becoming a Resource Partner, you will have the opportunity to meet many financial professionals at our local events. You and your company will be recognized as a Partner on our website, and printed material as it relates to the event. It is our job to give you as much exposure as possible. Our chapter will help you promote your special events that you may hold in our demographic area.

Many of our members seek out companies that have partnered with us before looking elsewhere! We encourage you to attend our local meetings and events, attend the educational sessions, and mingle with our members.

## ***About the FPA of Central FL***

Our chapter is the largest chapter in the state, with over 200 members! We are the largest geographically, and our membership extends from Gainesville to Melbourne and points in between. The average member has been in the financial profession for over 15 years, holds a CFP® designation as well as their Florida Insurance License. Over one half of our members charge a fee for planning. Our members serve over 31,900 clients with a wealth base of over \$14.5 billion.

## ***About the Westin Lake Mary***

Like a buoyant tide of energy and innovation, the new Westin Lake Mary, Orlando North will deliver a signature blend of sophistication and rejuvenation to Central Florida's leading technology hub. Convenient to Orlando's most inspiring attractions, our refreshing location helps elevate the spirit, and encourages guests to explore local shopping, renowned theme parks and an array of fine dining.

Each of their guest rooms is furnished with Westin's signature Heavenly Bed®, High Speed Internet Access, two dual-line speakerphones with data ports, and satellite television. Luxury suites are richly appointed with spacious dining and sitting areas and private wet bars. The Westin Lake Mary, Orlando North offers guests a 100% smoke-free environment.

Westin Lake Mary Orlando North has offered fantastic rates for our Symposium! \$133.00 per night! Please call 407.531.3555 and be sure to ask for the Financial Planning Association of Central Florida rate! Or, you can make your reservations on line! Rate is available Jan 29-31, with rate "based on availability" 3 days pre and post Symposium! What a deal!

[Click here to make your reservations:](#)

**Symposium / Chapter Underwriter—\$6,000**  
**Limit 2**

- Announcement of your Sponsorship and Underwriting of Symposium and Chapter for 2017
- Preferred Exhibit Space for Symposium
- Advertising/Logo listing on all conference promotion and materials
- Company listing and description in Program Guide
- Prominent Company signage throughout Symposium and all 2017 Chapter Meetings
- Introduction and Opening General Session; 75 minute General Session speaking opportunity \*\*
- Sponsorship of all chapter meetings in 2017 with registration for 2 attendees
- Full page ad in Attendee Program Guide – Prominent positioning
- Registration for 3 attendees at Symposium
- Pre and Post Conference Attendee List
- Membership list - updated semi-annually- Jan. and July
- Hot link on FPA website for one (1) year
- Speaking opportunity at one (1) Quarterly meeting in 2017
- Posting and email distribution of Research Article (“white paper”) or invitation to membership of company sponsored webinars (2)

**\*\* Please note: Presentations must be educational in content. The FPA of Central FL will apply for continuing education credits.**

**Additional Opportunities:** Interact with members at our 2017 Quarterly and Special Membership meetings and attend at no charge (for ONE attendee, others may attend at the member rate)! Our Quarterly meetings will provide you with additional opportunities to get to know our members. Provide “white paper” to be posted on FPA website and emailed to membership. Attend our “special events” (Ethics, Practice Management) at the no additional charge with opportunity to promote your company/product. CE Speaking opportunity during one of our 2017 Quarterly meetings (March, June, Sept and November). Introduction and 7 minute company promotion at all 2017 meetings.

**Diamond Partner—\$4,000**

- 75 minute Keynote General Session Presentation
- Advertising/Logo listing on conference promotion
- Company listing and description in Attendee Program Guide
- Preferred Exhibit Space for Conference
- Logo listing on Conference and FPA site
- Prominent Company signage throughout Symposium
- Membership listing for marketing
- Registration for 2 attendees and speaker
- Pre and Post Conference Attendee List
- Full page ad in Program Guide
- Hot link on FPA web site for one (1) year
- 20% discount Summer Event 2017 Event sponsor package
- Yearly pass to all Chapter Quarterly membership luncheons
- Updated Membership list available upon request

**\*\* Please note: Presentations must be educational in content. The FPA of Central FL will apply for continuing education credits.**

**Additional Opportunities:**

Interact with members at our 2017 Quarterly Membership meetings at no additional charge (for ONE attendee, other may attend at the member rate)! Our Quarterly meetings will provide you with additional opportunities to get to know our members. Attend our Quarterly Meetings as a Partner with a **5 minute product/company promotion at all quarterly meetings**. Provide “white paper” to be posted on FPA site and emailed to membership. Quarterly meetings include: March, June, September and November.

### **Platinum Partner—\$3,000**

- 50 minute Keynote General Session
- Advertising/Logo listing on conference promotion
- Company listing and description in Attendee Program Guide
- Preferred Exhibit Space for Conference
- Logo listing on Conference and FPA site
- Prominent Company signage throughout Symposium
- Membership listing for marketing
- Registration for 2 attendees and speaker
- Pre and Post Conference Attendee List
- Full page ad in Program Guide
- Hot link on FPA web site for one (1) year
- 10% discount Summer Event 2017 Event sponsor package
- Yearly pass to all Chapter Quarterly membership luncheons
- Updated Membership list available upon request

**\*\* Please note: Presentations must be educational in content. The FPA of Central FL will apply for continuing education credits.**

#### **Additional Opportunities:**

Interact with members at our 2017 Quarterly Membership meetings at no additional charge (ONE attendee, others may attend at the member rate)!. Our Quarterly meetings will provide you with additional opportunities to get to know our members. Provide "white paper" to be posted on FPA site and emailed to membership.. Free registration does not include special meetings such as Practice Management, Ethics courses, or meetings lasting 3 hours or more.

### **Gold Partner—\$2,000**

- Logo listing on conference promotion
- Company logo and description listing in Attendee Program Guide
- Web Page listing on Conference Site
- 6' skirted table for display
- Registration for 1 attendee and speaker
- Pre and Post Conference Attendee List
- Two- 50 minute breakout sessions \*\*
- Prominent signage throughout Symposium

**\*\* Please note: Presentations must be educational in content. The FPA of Central FL will apply for continuing education credits.**

#### **Additional Opportunities:**

Interact with members at our 2017 Quarterly Membership meetings and attend at no additional charge! (ONE attendee only. Others may attend at the member rate)! Our Quarterly meetings will provide you with additional opportunities to get to know our members. Free registration does not include special meetings such as Practice Management, Ethics courses, or meetings lasting 3 hours or more.

### **Conference Partner—\$1,250**

- Company listing on conference promotion
- Company logo and description in Attendee Program Guide
- 6' skirted table for display
- Registration for 1 attendee
- Pre and Post Conference Attendee List
- Partner introduction at Lunch

#### **Additional Partner Opportunities:**

- Continental Breakfast -- \$550—2 opportunities  
\* Introduction at scheduled breakfast(s) (table top not included)
- Lunch Partner -- \$1,500—2 opportunities  
\*includes benefits of Conference Partner
- Networking Break -- \$375—4 opportunities  
\*introduction at scheduled break(s) (table top not included)
- Cocktail Reception Partner -- \$2,000  
\*includes benefits of Conference Partner

# Thank you for supporting the FPA of Central Florida!

## 27th Annual FPA of Central Florida Symposium -- January 30 & 31, 2017 Resource Partner Letter of Agreement

☐ Underwriter \$6,000   ☐ Diamond \$4,000   ☐ Platinum \$3,000   ☐ Gold \$2,000   ☐ Conference Partner \$1,250

Booth location preference: ☐ Inside General Session room   ☐ Outside Pre Function area

### Additional Opportunities:

☐ \$550--Breakfast-- each (2 opportunities)   ☐ \$1,500--Luncheon--each (2 opportunities - includes display table)  
☐ \$375 --Networking Break each (4 opportunities)   ☐ \$2,000 Cocktail Reception (1 opportunity - includes display table)

### Company and attendee information:

Company Name: \_\_\_\_\_

Company Representative attending: \_\_\_\_\_

Title: \_\_\_\_\_

Address (as you want listed in Program Guide): \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_

Additional Representative: \_\_\_\_\_

Speaker: \_\_\_\_\_

(Please note, a \$100 fee will be charged for each additional representative unless otherwise noted on Partner Package)

Company description (as you want listed in the Program Guide – **100 words or less**):

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Date: \_\_\_\_\_ Submitted by: \_\_\_\_\_

(Person signing contract)

Date: \_\_\_\_\_ Received by: \_\_\_\_\_

Diane A. Layton, Executive Director

### **Space is guaranteed when payment received!**

### Billing information:

Contact Name: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Payment Method:   ☐ check   ☐ on line credit card payment (Contact Diane Layton) or [click here](#)

**Make checks payable and mail to: FPA of Central FL ♦ PO Box 520310 ♦ Longwood, FL ♦ 32752**

The Resource Partner agrees to hold harmless and release the **Westin Lake Mary and FPA of Central Florida**, their officers, representatives, agents and directors from all liability whatsoever for any loss, damage or injury resulting directly or indirectly from any cause in connection with the 2017 Symposium and execution of this Agreement. **To guarantee space, letter of agreement must be submitted ASAP and payment of fees for exhibit space and/or sponsorship payment must be received by FPA prior to December 15, 2016. Contact Diane Layton for questions: 407.814.9905 or [admin@fpafila.com](mailto:admin@fpafila.com)**