

# A Capital OPPORTUNITY

## PARTNERSHIPS

Presented by the  
**FINANCIAL PLANNING ASSOCIATION  
OF THE NATIONAL CAPITAL AREA™**

### OUR VISION FOR OUR PARTNERS:

To develop a long term relationship with sponsor partners that will create a professional and profitable relationship between our membership and them.

*FPA NCA Partnerships are available on a first come, first served basis. To reserve your partnership, please contact one of the sponsorship specialists listed in this brochure.*

The Financial Planning Association is one of the largest, most active, and most sophisticated financial advisor groups in the country with over

27,500 members and over 100 active local chapters. The FPA National Capital Area is this region's local chapter, widely recognized as a leader in the financial planning community.

The Financial Planning Association of the National Capital Area (FPA NCA) is the preeminent organization for financial planning professionals in the Washington, DC area including the District of Columbia, suburban Maryland and Northern Virginia.

The FPA NCA is among an elite group that has achieved the highest and most prestigious National FPA recognition for Chapters receiving Awards for nine consecutive years (2001-2009), as well as one of a select group to be recognized for the 2006 FPA Pinnacle Award.

The FPA NCA's more than 800 members are a valuable audience. Members collectively manage substantial investment assets on behalf of clients. Many FPA NCA members are nationally known and active within leading professional groups and societies. FPA NCA members have a wide range of industry experience ranging from seasoned twenty five or more years to novice first year planners.

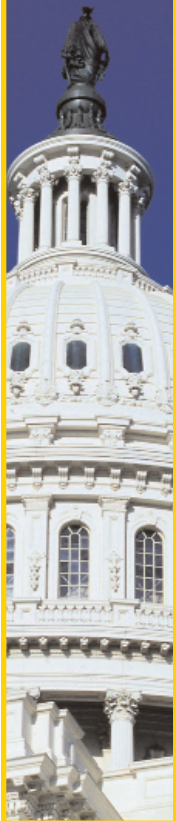
### ADDITIONAL SPONSORSHIP OPPORTUNITIES

Ethics Meetings . . . . .	\$2000
Golf Sponsorship Opportunities:	
Golf Club Raffle Sponsor . . . . .	\$1500
Beverage Cart Sponsor . . . . .	\$1250
Dinner Sponsor . . . . .	\$1250
Welcome Bag Sponsor . . . . .	\$1250
Hole in One Sponsors . . . . .	\$1000
Snack Sponsor . . . . .	\$1000
Closest to the Pin Sponsors. . . . .	\$600
Longest Drive Sponsors. . . . .	\$600
Straightest Drive Sponsors . . . . .	\$600
Single Golf Club Sponsor . . . . .	\$600
Name on Sign at Hole . . . . .	\$300
Patron Name in Program . . . . .	\$100

\*Please email [PeggyNelson8@verizon.net](mailto:PeggyNelson8@verizon.net) for specific information.

### KEY FPA NCA 2011 DATES

Winter Symposium – January 27, 2011  
Spring Symposium – June 2012  
Chapter Meetings Projected for Feb., March, June,  
July, Sept., Oct., Nov. and Dec.



### WHY CHOOSE THE FPA NCA AS YOUR PARTNER?

- Our average member is 49 years old
- 69% of our members hold the CFP designation
- 12% are CLUSs, CPA or CIMAs
- 72% have at least a Bachelors degree
- 35% have earned a Master degree

Our members include financial planners, broker dealers, insurance professionals, attorneys, CPAs and other accounting and tax specialists, investment and trust specialists as well as banking and thrift professionals. Your promotional activities reach an ideal target audience.

## 2012 PARTNERSHIP BENEFITS AT A GLANCE

BENEFITS	PREMIER \$4000 LIMIT 5	PREFERRED \$4000 LIMIT 10	GOLD \$3000 UNLIMITED	SILVER \$2000 UNLIMITED
<b>Monthly meetings</b> <ul style="list-style-type: none"> <li>• One 30 minute presentation before a meeting</li> <li>• Sponsor logo and contact information on program handouts</li> <li>• Receive one copy of attendees list</li> <li>• Exhibit table at all meetings</li> <li>• Distribute brochures/research at all attendee seats</li> <li>• Firm logo Presented on Screen</li> <li>• One representative at all meetings – meals included</li> </ul>	• • • • • • •	• • • • • • •	• • • • • • •	• • • • • • •
<b>Two practice development half day meetings</b> <ul style="list-style-type: none"> <li>• Sponsor logo and contact information on program handouts</li> <li>• Exhibit table at all meetings</li> <li>• Receive one copy of attendees list</li> <li>• Distribute brochures/research at all attendee seats</li> <li>• Firm logo Presented on Screen</li> <li>• One representative at each meeting – meal included</li> </ul>	• • • • • •	• • • • • •	• • • • • •	• • • • • •
<b>Winter and Spring symposia</b> <ul style="list-style-type: none"> <li>• Priority reserved booths at the Symposia in the best locations</li> <li>• 50 minute presentation at Spring Symposium</li> <li>• Marketing insert in Attendee Winter Symposium Notebook</li> <li>• Two representatives at Winter Symposium – all meals included</li> <li>• Exhibit Table at Winter Symposium</li> <li>• Receive one copy of attendees' list the day of the event</li> <li>• Marketing insert in Attendee Spring Symposium Notebook</li> <li>• Two representatives at Spring Symposium – all meals included</li> <li>• Firm logo presented on screen</li> <li>• Exhibit Table at Spring Symposium</li> <li>• Company logo and representative information listed in symposia handouts</li> </ul>	• • • • • • • • • • • •	• • • • • • • • • • • •	• • • • • • • • • • • •	• • • • • • • • • • • •
<b>Membership Correspondence</b> <ul style="list-style-type: none"> <li>• Display of one Sponsor event on chapter calendar per month</li> <li>• One membership email blast subject to FCC Rules<sup>1</sup></li> <li>• Firm's name/logo and website link on website</li> <li>• Receive all email announcements sent to membership</li> <li>• One set of membership mailing labels</li> <li>• Receive copy of monthly newsletter by email</li> <li>• One copy of most recent printed Directory</li> </ul>	• • • • • • •	• • • • • • •	• • • • • • •	• • • • • • •
<b>Newsletter</b> <ul style="list-style-type: none"> <li>• One featured education article in monthly newsletter (pdf)</li> <li>• Company logo and representative information listed in newsletter as valued sponsor</li> </ul>	• •	• •	• •	• •

## Sponsorship Levels for 2012

Four levels of Partners:

### **I. Premier Partners – Limited to 5 – This is the highest level of FPA NCA Partnership.**

#### **Eligibility requirements for Premier Partners:**

1. Sponsor must be related to the financial planning / investment profession
2. Must have been a prior Platinum/Preferred Partner in the previous year
3. Must have actively served on a committee or on the Board in the previous year
4. Must be approved by a majority Board vote

#### **Premier Partner Benefits:**

1. One 30 minute presentation of your choosing, including information about your company and products, prior to a regular luncheon meeting.
2. One 50 minute presentation at the May symposium.\*
3. Facilitated introductions to chapter members
4. Priority/reserved booths at the Symposia in the best locations
5. Display of one Sponsor event on chapter calendar per month

<sup>1</sup> The Federal Communications Commission has proposed some rules that may restrict the ability of a non-profit organization to distribute unsolicited emails without specific, written permission from the recipient. While we anticipate that we will obtain such permission from our members, we cannot guarantee that it will meet the guidelines that the FCC ultimately adopts.

## **II. Preferred Partner – Limited to 10**

### **Eligibility requirements for Preferred Partners:**

1. Sponsor must be related to the financial planning / investment profession
2. Previous Platinum/Preferred sponsors will be afforded first opportunity for the next year's Preferred sponsorship. Sponsors will have until December 15<sup>th</sup> to return the signed agreement. After December 15<sup>th</sup>, remaining sponsorships will be given to the first new sponsors that submit a completed signed Agreement. If there is a conflict, the Board will decide via a majority vote.

### **Preferred Partner Benefits:**

1. One 50 minute presentation at May symposium.\*
2. Booth display at all chapter membership meetings.
3. Company Logo and Representative Information listed in Attendee Handouts for all chapter programs.
4. Marketing insert in Attendee Symposium Notebook if submitted on time by publishing date.

**III. Gold Partner (unlimited)** – This level of sponsorship may include both industry related and service related sponsors. No presentation time is associated with this level of sponsorship.

### **Eligibility requirements for Gold Partners:**

1. None.

### **Gold Partner Benefits:**

1. Booth display at all symposiums.
2. Membership list/labels.
3. Company Logo and Representative Information listed in monthly Newsletter.
4. Firm's logo and website link on chapter website.

**IV. Silver Partner (unlimited)** – This level of sponsorship may include both industry related and service related sponsors. No presentation time is associated with this level of sponsorship. No representation at the Winter Symposium is associated with this level of sponsorship.

### **Eligibility requirements for Silver Partners:**

1. None

### **Silver Partner Benefits:**

2. Booth Display at Spring Symposium.
3. Membership list/labels.
4. Company logo and Representative Information listed in monthly Newsletter.
5. Firm's logo and website link on chapter website.

\*The Spring Symposium will have three tracks of meetings running simultaneously. All of the 15 Premier and Preferred Partners will have a 50 minute presentation slot on a topic of their choice. It is strongly recommended that Sponsor Partners choose a topic which will be eligible for CEU and will be educational for our members attending. Partners will be required to submit Bios and Outlines of their chosen speakers by February 15, 2011 in order to meet CE approval and listing in the Symposium Brochure advertising the event. Any remaining time in the program not used by these 15 Partners will be filled with speakers of FPA NCA's choosing.

IF YOU WOULD LIKE TO DISCUSS PARTNER OPPORTUNITIES IN GREATER DETAIL, PLEASE CONTACT DAN LASH AT 703-356-4360, EXT. 703 OR DLASH@BRUCEVAUGHN.COM OR RACHAEL DECOSTA MARTIN AT 202-498-0852 OR RACHAEL.DECOSTA@VERIZON.NET.

OUR SPONSORSHIP AGREEMENT FORM CAN BE FOUND ON OUR WEBSITE AT WWW.FPANCA.ORG AND CAN BE COMPLETED ON LINE.

IF YOU WOULD LIKE TO DISCUSS ANY OTHER QUESTIONS REGARDING OUR CHAPTER, PLEASE CONTACT PEGGY NELSON AT 703-620-1712 OR PEGGYNELSON8@VERIZON.NET.

ALL PARTNERSHIP PACKAGES ARE BASED ON THE 2012 CALENDAR YEAR. FPA NATIONAL CAPITAL AREA RESERVES THE RIGHT TO REQUIRE ALL MEMBERSHIP LITERATURE, CORRESPONDENCE AND AD SUBMISSIONS TO CONFORM TO OUR POLICIES AND FORMAT REGULATIONS.