



## OF *SAN ANTONIO & SOUTH TEXAS*

Dear Sponsors,

Re: FPA of San Antonio & South Texas Sponsorship Program

On behalf of the FPA of San Antonio & South Texas ("Chapter"), I would like to thank you for your interest in the Sponsorship Program of our Chapter. This Program is specifically designed to bring interaction and access for sponsors, with our membership of Financial Planners. I hope you will take a few minutes to review the information included in this package.

Much of the success of our Chapter is due to the support of our sponsors. Our sponsors' financial contribution helps us provide nationally recognized speakers, special activities and events.

FPA membership provides valuable benefits to our members with 10 regular lunch meetings with CE speakers on the fourth Wednesday or each month at Oak Hills Country Club where 20-50 members attend. In addition, we have an annual Symposium at Incarnate Word with 5-6 hours of CE in a whole day event with sponsor booths and meals. Our local chapter membership usually hovers around 200 members, most of whom are CFP® professionals.

San Antonio & South Texas FPA Membership as of 6/2014

- Average years of membership 9.3
- Average age 53
- Number of CFP® Professionals 130
- Identify as Financial Planner 105

We strive to enhance our Chapter Sponsorship Program each year based on feedback from our current sponsors. This year we are pleased to include the following improvements:

- *Table sponsors for the symposium lunch*
- *Table tents highlighting our chapter sponsors*
- *Integrating the sponsor booths into the symposium meeting space*

To help individualize your selection, we offer sponsorships in four levels:

**Platinum, Gold, Silver and Bronze**, each level with its own benefits. Platinum and Gold levels offer the most value and include the most benefits. In addition, there are specific **Totebag** and **Notepad** sponsorships designed for our largest annual event, the Symposium.



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By limiting the number of sponsors that we accept for each level, we make this a more exclusive program for each and every sponsor. The Program is structured to allow only a few select sponsors representing a cross section of the industry to participate at any given time. This assures that all sponsors have their choice of dates, programs and events that they would like to co-sponsor and/or provide speakers for.

If you have any questions about the sponsorship levels we have presented, please call me at 210.822.6600 or email me at [execdir@fpasatx.org](mailto:execdir@fpasatx.org).

Respectfully,

Lynn Getz  
Chapter Executive Director  
FPA of San Antonio & South Texas



Chapter Sponsors		Value	Platinum (P) Limit 1 \$3,000	Gold (G) Limit 3 \$1,500	Silver (S) Limit 10 \$1,000	Bronze (B) Limit 10 \$500
BENEFITS						
1	10 min. Sponsor Spotlight Presentation at the annual Symposium	\$500	Yes			
2	Keynote Speaker – at the annual Symposium	\$2,000	Yes			
3	Exhibit space for Symposium	\$2,000	Premium	Premium	Yes	Yes
4	Advertisements in the Symposium Program	Varies	Two Full Pages \$700	One Full Page \$360	1/2 Page \$200	1/4 Page \$120
5	Sponsor Spotlight Presentation at a Chapter Luncheon Event	\$150-\$100	5 Minutes	5 Minutes	2 Minutes	
6	50 Minute Educational Speaker at Chapter Luncheon Event	\$500	Yes	Yes		
7	Monthly Lunch Meetings <i>Additional lunches purchased at membership price</i>	\$25/per	20 Passes	10 Passes	5 Passes	Member Price
8	Chapter Luncheon Exhibit Space	\$150	Yes	Yes	Yes	
9	Emails blast to membership ( <i>per year</i> )	\$250 per	Four (4)	Four (4)	Two (2)	
10	Website listing <i>(with link to company website)</i>	\$250	Yes	Yes	Yes	Yes
11	Chapter demographic report & access to membership	Priceless	Yes	Yes	Yes	Yes
12	Regular recognition as Sponsorship Partner	Priceless	Yes	Yes	Yes	Yes

Symposium Sponsors		Value	Tote Bag Sponsor Limit 1 \$1,000	Notepad Sponsor Limit 1 \$500
BENEFITS				
	Logo displayed on symposium gear	\$250	Yes	Yes
3	Exhibit space for Symposium	\$2,000	Premium	Yes
4	Advertisements in the Symposium Program	Varies	1/2 Page \$200	1/4 Page \$120
7	Monthly Lunch Meetings <i>Additional lunches purchased at membership price</i>	\$25/per	5 Passes	Member Price
10	Website listing <i>(with link to company website)</i>	\$250	Yes	Yes

Symposium Benefits
Luncheon Benefits
Other Benefits



**Explanation/Summary of Sponsor Benefits**  
**(P)** Platinum / **(G)** Gold / **(S)** Silver / **(B)** Bronze  
**(T)** Totebag / **(N)** Notepad

1. Ten (10) minute presenting sponsor spotlight presentation at the Symposium luncheon. **(P)**
2. Keynote speaker – presenting sponsor at the annual Symposium. **(P)**
  - Keynote speaker will be scheduled at the discretion of the Chapter Symposium Director: opening, mid-day, or closing keynote – this is based on the overall speaker line-up and speaker's travel needs
  - Keynote speaker must be a nationally recognized speaker
  - Keynote speaker will speak for 50-90 minutes, depending on overall agenda
  - As the presenting symposium sponsor, your company logo will be included on all promotional event materials, website, blast emails and signage
  - The topic must be a timely, relevant and advanced educational topic and must be CFP® CE approvable
3. Symposium sponsor booth, exhibiting space. **(S) (B) (T) (N)**
  - Premium location, taking advantage of highest flow of participant traffic. **(P) (G)**
4. Advertisement in the Symposium Program
  - Two (2) full page ads – a \$700.00 value **(P)**
  - One (1) full page ad - a \$360.00 value **(G)**
  - One-half (1/2) page ad – a \$200 value **(S) (T)**
  - One-fourth (1/4) page ad - a \$90.00 value **(B) (N)**
5. Sponsor spotlight at a Chapter Meeting Luncheon.
  - Five (5) minute **(P) (G)**
  - Two (2) minute **(S)**
6. 50 minute educational speaker at one (1) Chapter luncheon meeting. **(P) (G)**
  - Speaker will be scheduled at the discretion of the Chapter Education Director - this is based on the overall speaker line-up for the year and speaker's travel needs
  - The topic must be a timely, relevant and advanced educational topic and must meet CFP® CE approvable
  - Speaker will speak for 50 minutes
7. Sponsors may attend or bring guests to luncheons at no additional cost. Once Lunch passes are used up, member prices apply. (currently \$25 per)



- 20 Lunch Passes **(P)**
  - 10 Lunch Passes **(G)**
  - 5 Lunch Passes **(S)**
8. Table exhibit at all ten (10) Chapter luncheon events, **(P) (G) (S)**
  9. Emails to the Chapter membership per year.
    - Four (4) **(P) (G)**
    - Two (2) **(S)**
  10. Website listing of sponsor hosted webinars, events, and conferences (link to your website) for a full year. **(P) (G) (S) (B) (T) (N)**
  11. Chapter demographic report & access to membership **(P) (G) (S) (B) (T) (N)**
    - License Types
    - Professional Designations
    - Education Level
    - SEC/State Registrations
    - Compensation Model
  12. Regular recognition as Sponsorship Partner **(P) (G) (S) (B) (T) (N)**
    - Table tents at monthly Chapter Meetings and the Symposium

DUE DILIGENCE TERMS & CONDITIONS: All perspective corporate sponsors 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.)

\* Each major event has limited sponsor slots available and will be assigned on a first come, first served basis



## **Letter of Agreement for Chapter Sponsors**

The undersigned party (herein after "Sponsor") hereby applies to become a Corporate Sponsor of the FPA of SA&ST Chapter under the terms of the "Corporate Sponsor Program" (herein after "Program") for the current sponsorship year. If Sponsor is accepted to the Program, Sponsor further agrees to a partnership contract term of one calendar year, payable upfront.

The FPA of SA&ST Chapter (herein after "Chapter") strives to develop quality partnership relationships with sponsors who have a long-term interest in supporting the financial planning industry. Sponsor 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 sponsors in a given year. Furthermore, the qualified sponsors 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 the level of sponsorship selected by the sponsor.

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

All perspective corporate sponsors 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.)

**All levels do include exhibit space at the next annual Symposium which are held in April.**

### **Responsibilities of Sponsor will include:**

- Payment of annual Corporate Sponsor fee (based on level selected).
- Active participation in the education of our membership on your company's products and services.
- Provide copies for advertisement.
- Provide booth materials and set up at the annual Financial Planning Symposium.
- Maintain good corporate citizenship and standing.

### **Chapter may:**

- At its sole discretion, accept, deny, non-renew, and/or terminate Sponsor.
- Schedule, reschedule, or cancel, at its discretion, meeting dates or presentations and will not be responsible for any Sponsor liabilities, financial or otherwise, arising from such actions.
- Change the Corporate Sponsor fee and/or prompt payment discount at renewal within a thirty (30) day notice.

**Continued...**



**Letter of Agreement for Chapter Sponsors**

Sponsor agrees to the above terms, and hereby applies for a partnership with the Chapter in the Program on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

Signed by:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

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

\_\_\_\_\_  
Address, City, State, and Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Fax

\_\_\_\_\_  
E-mail

\_\_\_\_\_  
Website (to be linked to the Chapter website)

\* If you are a new Corporate Sponsor, or if you are an existing Sponsor and your logo has changed, please send your company logo to Lynn Getz, Chapter Executive Director at [execdir@fpasatx.org](mailto:execdir@fpasatx.org) in JPG or GIF format.

\* If the information to be listed on the Chapter website is different from above, please include how you would like the website listing to read below. If the contact information above appears as you would like to be listed on the website, please leave blank.

\_\_\_\_\_  
Printed Name

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

\_\_\_\_\_  
Address, City, State, and Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Fax

**Fax this page, the benefit selection sheet for your level of sponsorship (Platinum, Gold, Silver, or Bronze), along with the Sponsorship Invoice to 210.822.6600**



**SAN ANTONIO & SOUTH TEXAS SPONSOR INVOICE**

CONTRACT STARTING DATE	CONTRACT TERM	TERMS
/ /	1 Year	Fee must accompany signed Contract

Sponsor Level	Description	Price	Total
	Platinum Sponsor	\$3,000.00	\$
	Gold Sponsor	\$1,500.00	\$
	Silver Sponsor	\$1,000.00	\$
	Tote Bag Sponsor	\$1,000.00	\$
	Notepad Sponsor	\$750.00	\$
	Bronze Sponsor	\$500.00	\$

**Total Due \$** \_\_\_\_\_

\_\_\_ **Will pay by check (due within 10 days)**

Mail to: FPA of San Antonio & South Texas, P.O. Box 34036, San Antonio, Texas 78265  
Payable to: FPA of San Antonio & South Texas

\_\_\_ **Please charge my credit card for the total amount due: \$** \_\_\_\_\_

**CC#** \_\_\_\_\_ **Exp. Date:** \_\_\_\_\_

**CDC Code:** \_\_\_\_\_ **Name on card:** \_\_\_\_\_

**Address where the credit card statement is mailed to:** \_\_\_\_\_

**Will you require exhibit space at the Financial Planning Symposium to be held in April?**

\_\_\_ Yes \_\_\_ No

**Select a date for your sponsor spotlight at a Chapter luncheon event** from the following list of monthly meetings. Dates are on a first come first serve basis (limit of 1 per date) – please add “1” to your first choice and “2” to your second choice.

**Platinum, Gold, Silver Sponsors**

January \_\_\_ February \_\_\_ March \_\_\_ April N/A May \_\_\_ June \_\_\_  
July \_\_\_ August \_\_\_ September \_\_\_ October \_\_\_ November \_\_\_ December N/A

Thank you for your participation in our Sponsorship Program.  
We look forward to working with you during the coming year.





## **Deadlines & Specs for Emails and Advertising**

### **Broadcast E-Mails to Chapter Membership:**

The email should be sent to Lynn Getz, Chapter Executive Director at [execdir@fpasatx.org](mailto:execdir@fpasatx.org) in HTML format. The email can include any content of your choice, including graphics. Please specify if there are any special instructions, attachments, or if there is a specific date you would like for it to be sent.

The email will be sent out with you listed as the sender and recipients will see that it is coming directly from your email address. Please specify the email address you would like listed as the 'sender'.

### **FPA website has a designated web page for Sponsors**

Logo in JPG Format      *No larger than 200KB*

Name

Title

Email

Website URL

Phone

*Email logo and contact information to: [execdir@fpasatx.org](mailto:execdir@fpasatx.org)*

### **Symposium Advertisements:**

Color or B&W                      Width x Height

Full (1) Page                      7 ½" x H 0 ½"

Half (½) Page                      5" x 7 ½"

Quarter (¼) Page                      3 ½" x 5"

Format ad in either JPG or PDF

*Email ad in print ready format to: [execdir@fpasatx.org](mailto:execdir@fpasatx.org)*



## CHAPTER SPEAKER GUIDELINES

### The following guidelines apply to:

- **Platinum Sponsors** – providing a keynote speaker and topic for the Financial Planning Symposium and/or an educational speaker for a Chapter luncheon event; and
- **Gold Sponsors** – providing an educational speaker for a Chapter luncheon event

### **Keynote Speaker at Symposium**

This will be coordinated through the Chapter Symposium Director to ensure the best fit and topic for this event. The final topic and speaker approval are at the sole discretion of the Chapter. The speaker must be a nationally recognized—speaker name and topic should appeal to a broad audience. The time slot for the keynote speaker will also be at the sole discretion of the Chapter and will be either the opening keynote, mid-day keynote or closing keynote – this is based on the overall speaker line-up and speakers travel needs.

Promotional materials (speaker bio, topic, outline, etc.) are due no later than 45 days prior to the meeting date. If the content is late, there will be a risk of losing your speaking spot, as it will have to be filled with an outside speaker.

A minimum of 2 speakers/topics are due to the Education Director for consideration no later than sixty (60) days prior to the meeting date. The topic will be chosen based on content and relevancy to the Chapter audience. **The keynote speaker must be a high-profile name that is recognized on the speaker circuit.**

Topics and outlines must be CFP® CE credit eligible when at all possible. The Chapter will file for all CE credits.

The topic and CE credits are the key element to attendance numbers at our Chapter events. Sponsors are asked and are encouraged to submit their best speakers for the best results and attendance numbers. An impressive speaker reflects well on the sponsoring company.

Speakers will have 50 total minutes to talk; we request the topic be covered in 40-45 minutes, followed by a 5 to 10 minute Q&A session.

We would like to have a short introduction/bio provided by the sponsor to be used by the President or the Education Director to introduce the speaker.

For questions regarding these benefits, please contact Lynn Getz, Chapter Executive Director, 210.822.6600; [execdir@fpasatx.org](mailto:execdir@fpasatx.org).