FPA of Oregon & SW Washington

2027 Partnership Program

FINANCIAL PLANNING ASSOCIATION
OREGON & S.W. WASHINGTON

FPA Signature Events: March 10 | May 26 | July 21 | November 17
FPA Webinars: Jan 13 | Feb 3 | Apr 21 | Jun 23 | Aug18 | Oct 13 | Dec 8

Exhibit & Sponsorship Opportunities

FPA connects you with the right people and firms who are at the forefront of financial planning, while also raising your profile and recognition within the industry.

The FPA of Oregon & SW Washington is one of the most active chapters in the country, providing high-quality professional development, continuing education (CE), and networking opportunities on a local level to our almost 300 members. We expect approximately 50 to 100 participants at each 2027 FPA Signature Event and have built in dedicated time for you to reconnect on an individual level.

By becoming a 2027 FPA Partner; you will:

- **» Boost your business revenue by connecting with key leaders and decision-makers**
- **» Engage with new CFP® professionals & increase your contact list**
- **» Strengthen relationships by showing your support**
- **» Personally spread awareness about your company in real-time, in-person**

Our 2027 FPA Signature Events offer a variety of timely CE that attracts the best of the best planners from small and large firms across the state and region. There will be multiple topics presented by fantastic speakers at each meeting, which will bring in a diverse audience of planners and advisors.

Why become a partner? It's more important than ever for FPA to provide face-to-face interactions to help you re-connect and expand your network on a personal level.

- Build brand name recognition
- Gain industry-wide exposure
- Network with decision-makers
- Provide product education and build personal connections
- Identify opportunities for your company; enhance relationships
- Achieve public recognition for making a difference

Sponsorships highlight your organization directly to your target audience. Don't miss this fantastic marketing opportunity!

Spread the word! We encourage you to share your participation in our programs and invite a colleague who may benefit from our offerings. Know a planner who is not involved with FPA? Show them value by inviting them to attend one of our Signature Events!

Please review the sponsor information and contact the FPA office if you have any questions. **We look forward to seeing you at our 2027 Signature Events!**

Partner | Connect | Support

Partner Package Sponsors are our premiere supporters who receive the most splash and opportunities to be in front of our members throughout the year.

2027 Annual Partner Package Sponsorships	Platinum	Gold	Silver
Annual Investment	**$5,500**	**$2,750**	**$1,900**
FPA Quarterly Signature Events – included per package selection			
Exhibit Tabletop at 2027 Spring Financial Forum (SFF) on March 10	√	√	√
Exhibit Tabletop at 2027 May CE Symposium on May 26	√	√	
Exhibit Tabletop at 2027 Summer CE Social on July 21	√		
Exhibit Tabletop at 2027 Fall CE Summit on November 17	√	√	√
Complimentary Registration to Each Sponsored Event (per package)	2 reps	1 rep	1 rep
Other Sponsorship Options - Enhanced Benefits for each sponsored event			
Dedicated webpage on FPA chapter website for one year (sponsor provides content) – ***new and very valuable benefit!***	√		
3-minute speaking/podium time during one sponsored event	√	√	
FPA member list (all members including non-attendees; name and company only)	√		
FPA-administered **Social Media Post** (content submitted by sponsor)	√	√	
Verbal and Printed Recognition as Package Sponsor at all 2027 FPA Events	√	√	√
Your **company logo** (with a direct link) included on FPA-administered **event promotions** (email blasts)	√	√	√
One **complimentary Job Posting** on FPA chapter's Job Board (in 2027)	√	√	√
Full Conference **Attendee List** (First and Last Name and Company only)	√	√	√
Your **company logo with link** added to Sponsor Page on **FPA chapter site**, with rep name and contact info	√	√	√
Board President/Emcee's Verbal Recognition throughout sponsored event	√	√	√
Opportunity to provide a Prize (for drawings/giveaways) – sponsor provides gift	√	√	√
Option to provide "swag" to attendees at exhibit table (provided by sponsor)	√	√	√

BENEFITS FOR ALL PARTNER PACKAGE SPONSORS: Each package sponsor receives acknowledgement in pre-event invites and promotions by the Board President/Emcee in day-of announcements, on-site materials, and post-event materials. **Register to sponsor early so your support will be included in all promotions.**

EXHIBIT AT OUR 2027 SIGNATURE EVENTS

WHEN CAN I EXHIBIT? Exhibit tabletops are available for each 2027 quarterly Signature Event. The exhibit area will be open throughout each event in a high-traffic area. We will offer dedicated exhibit times to increase exposure time with attendees.

Exhibit Fees (per event):

- Spring Financial Forum (March 10): $500
- May CE Symposium (May 26): $500
- Summer CE Social (July 21): $400
- November CE Summit (Nov 17): $1000

WHAT IS INCLUDED IN THE EXHIBIT REGISTRATION? Your exhibit includes one skirted 6'exhibit table with a chair and access to power (if requested in advance). Each exhibiting company includes one complimentary exhibitor representative. Registered exhibitors are provided all meals and break on the registered exhibit days. Additional company representatives may register and pay separately as an attendee.

Please note: Exhibits are available to any company interested in getting in front of FPA members. Each "Package" Sponsor receives exhibit benefits as part of their sponsorship, but companies may elect to exhibit only at each event.

INDIVIDUAL "Ala Carte" SPONSORSHIPS

	FPA Member Price	Non-Member Price
NEW* Webinar Sponsor	$400	$550
Sponsor our regular webinars.		
Break Sponsor	$500	$750
Be the one who keeps the coffee pots full/refreshments provided! Available for any Signature Event.		
Speaker Sponsor	$1,000	$1,250
Attach your name to one of our headliners. Available for any Signature Event.		
Name Badge Sponsor	$500	$750
Put your company logo on something everyone looks at. Available for any Signature Event.		
Badge Lanyard Sponsor	$500	$750
Put your company logo on the cord that everyone wears. Available for any Signature Event. Lanyards provided by sponsor		
Breakfast Buffet Sponsor	$1,000	$1,250
Be recognized for suppling the sustenance! Available for any Signature Event except the Summer Social.		
Lunch Sponsor	$1,000	$1,250
Be recognized for supplying the sustenance! Available for any Signature Event except the Summer Social.		
Reception Sponsor	$1,000	$1,250
Be recognized for supplying the sustenance!		

Interested in a unique sponsorship not listed here?

We want sponsorships to bring value to you/your company and we welcome your ideas!
Email Danae Johnson, Sponsor Director, danae@capfina.com or Taylor Scott, FPA Association Manager, to discuss at manager@fpa-or.org

Don't delay

The Fine Print – Sponsorship Requirements & Terms:

- All sponsorships must be paid at time of form submission and are sold on first-come, first-served basis.
- FPA reserves the right to change or eliminate events without advance notice and will assign all exhibits and sponsorships.
- Sponsors are responsible for supplying information necessary for benefits such as social media post.
- Cancellation policy: Because of the immediate benefits of sponsorship, cancellations received after form submission will not receive a full or partial refund. All submitted sponsorships are considered payable upon receipt and no exceptions made.