



Thank you for your interest in partnering with the Financial Planning Association of Wisconsin. We're excited about our growth and new opportunities as a statewide organization, and about your interest in working together in 2018!

The Benefits Opportunities page explains the four different levels, their benefits, and the costs. The Platinum, Gold, and Silver levels offer exhibition at our Annual Symposium. Bronze Partners may purchase space, if available, at a discounted rate.

The FPA of Wisconsin Chapter expects to have about 425 members as of January 1, 2018. Attendance at the four chapter meetings ranges between 50 and 75. There will also be regional meetings and networking events to which you will be invited. Every fall, the Annual Symposium attracts state-wide attendees and has been growing each year. Our goal is to have over 150 registrants at the 2018 event.

Important statistics to be aware of:

- Average member age -- 50 years old
- 44% of members have ten plus years of professional experience
- 71% of members are CFP® Certificants
- 46% are RIAs
- 44% hold their WI insurance license
- 41% have their Series 7 license

Why partner with FPA Wisconsin?

Profitable Business Network

The financial professionals you'll meet through the FPA of WI Chapter can help you build long-term business relationships. FPA of WI members represent a broad spectrum of specialties including financial planning, broker dealer services, insurance/annuities, mutual funds, banks/thrifts/trust, law, investment management and accounting. Members are a highly targeted market for your product or service.

Qualified Business Leads

The Chapter holds quarterly member meetings that provide attendees with continuing education credits. Speaking to this group gives you a targeted audience that is open to hearing your message. Members who attend are there to learn new information and network before and after meetings. It's an excellent time to collect business cards for follow-up marketing. Members are continually looking for information on new products and services to meet their clients' needs.

Symposium

In addition, partnering and speaking opportunities are also available at the Annual Symposium.

The first step in securing your spot for 2018 is to fill out and return the Letter of Agreement; and then of course to follow it up with your payment. The form will tentatively hold your spot. It may be emailed to info@fpawi.org or mailed to us at 1702 Ashlawn Lane, Waunakee, WI 53597.

If you have any other questions, feel free to communicate with our 2018 Partnership committee or the FPA Executive Director:

Nick Ziarek, CFA, AIF, 2018 Partnership Director, 262.814.1600, nick@shakespearewm.com
Megan Heintzkill, CFP®, CDFA, 2018 Partnership Committee, 920.431.3605, mheintzkill@nicoletwealth.com
Brenda Matthias, Executive Director, 608.246.9001, info@fpawi.org



PARTNER BENEFIT OPPORTUNITIES – YEAR 2018

Partnership Levels	Platinum \$5,000	Gold \$3,500	Silver \$2,000	Bronze \$1,000
General Benefits				
Name & logo with direct link to firm's website on FPA home page	•	•		
Firm name listed on FPA home page			•	•
Chapter promotion of one company hosted event or webinar	2	1	1	
Electronic spreadsheet of membership (<i>must request</i>)	2	1	1	
First right of refusal to present at Symposium and Free CE Day	•			
First right of refusal to present at Symposium or Free CE Day		•		
One email ad to entire membership (<i>you provide information</i>)	•			
Quarterly Member Meeting Benefits				
Presentation at one meeting	10 mins	5 mins		
Annual passes to four meetings during the year	3	2	1	1
Introduction at every meeting with a representative in attendance	•	•	•	•
Handout company brochures at shared Partner table	•	•	•	•
Attendee list from meeting (<i>must request</i>)	•	•		
Financial Planning Symposium Benefits				
Two company representatives at Symposium	•	•	•	•
Logo recognition in special Symposium email	•	•	•	
Attendee list from Symposium – one pre- and one post-event	•	•	•	
Exhibitor at Symposium <ul style="list-style-type: none"> • Exhibit space/booth • Recognition as Partner in Symposium handout materials • Full one page handout in attendee folder • Introduction at Symposium 	•	•	•	\$900
First chance to sponsor Symposium Upgrades - <ul style="list-style-type: none"> • Keynote Session - \$1,000 • Monday Evening Reception - \$500 • Breakfast - \$500 • Lunch - \$500 	•	•		
Other Benefits				
Presentation at Free CE Day	•	•	\$300	\$300
Pints 'n' Planning Sponsorship	•	•	\$500	\$500

See Letter of Agreement for Benefit Selection Sheet
Methods of Payment: Check or Credit Card – Visa / MasterCard / American Express



PARTNER LETTER OF AGREEMENT FOR YEAR 2018

The undersigned hereby applies to become a Partner of the Financial Planning Association of Wisconsin (FPA-WI) chapter for the 2018 sponsorship year. If Partner is accepted, by signing below, Partner understands that this agreement serves for the term of January 1st through December 31st, payable in advance.

The FPA of Wisconsin strives to develop quality partnership relationships with sponsors who have a long-term interest in supporting the financial planning industry. Partner understands that FPA-WI has the ultimate right to refuse acceptance to any party without recourse in its pursuit of that goal. All benefits are offered with the understanding that the Partner assumes the responsibility to use benefits within the calendar year.

RESPONSIBILITIES OF PARTNERS

Responsibilities of Partners will include:

- Prompt payment of annual partnership fee.
- Active participation in the education of our membership on your company's products and services.
- Assume the responsibility to take advantage of benefits to be used within calendar year.
- Only Platinum, Gold and Silver Partners have permission to mail correspondence to FPA membership. Request data two weeks prior to mailing date.

FPA of Wisconsin may:

- At its sole discretion, accept, deny, non-renew, and/or terminate Partner. No refunds or carry-overs are given.
- Schedule, reschedule, or cancel, at its discretion, meeting dates or presentations and will not be responsible for any Partner liabilities, financial or otherwise, arising from such actions.

Partner agrees to the above terms, and hereby applies for a partnership with the FPA-WI:

Entered into this _____ day of _____, 201__.

Signed by:

Signature

Printed Name

Company Name (as you want it listed on the website)

The partner to be listed as the contact

Email Address

Website

Mailing Address

City, State, Zip Code

Company Phone

Contact Phone



BENEFIT SELECTION SHEET

<p>Sign Me Up for 2018 Partnership (Section A):</p> <ul style="list-style-type: none"><input type="checkbox"/> Platinum Partner - \$5,000<input type="checkbox"/> Gold Partner - \$3,500<input type="checkbox"/> Silver Partner - \$2,000<input type="checkbox"/> Bronze Partner - \$1,000 <p>Sub-Total Section A: \$ _____</p>	<p>Annual Symposium Upgrades (Section B):</p> <ul style="list-style-type: none"><input type="checkbox"/> Keynote Session (2 available) - \$1,000<input type="checkbox"/> Breakfast - \$500<input type="checkbox"/> Lunch - \$500<input type="checkbox"/> Pints 'n' Planning Reception - \$500<input type="checkbox"/> AdvisorAdit Tool - \$500<input type="checkbox"/> Beverage Station - \$300 <p>Sub-Total Section B: \$ _____</p>
<p>Total Amounts from Section A & B:</p> <p>\$ _____</p>	<p>Submit payment by January 31st to qualify for the Prompt Payment Discount.</p> <p>Platinum: Deduct \$500 Gold: Deduct \$175 Silver: Deduct \$100</p> <p>Total Amount Due: \$ _____</p>
<ul style="list-style-type: none"><input type="checkbox"/> We plan to send a check.<input type="checkbox"/> Please send invoice to be paid by credit card. <p style="text-align: center;">Return to the FPA of Wisconsin Email: info@fpawi.org or Mail to: FPA of Wisconsin 1702 Ashlawn Lane Waunakee, WI 53597</p>	
<p>Special Note:</p> <p><i>FPA of Wisconsin may have some special opportunities throughout the year for sponsorships that would provide you with additional exposure. As those become available, we will reach out to you by email – with absolutely no obligation on your part. We are very appreciative of all that you do for us.</i></p> <ul style="list-style-type: none"><input type="checkbox"/> We may be interested in additional sponsorship opportunities. Estimated cost TBD.	