



# 2018 Partnership Program

## PARTNERSHIP COORDINATOR

13611 E. 104th Ave., Ste 800, PMB 302, Commerce City, CO 80022

303.450.0515 [info@cofpa.org](mailto:info@cofpa.org)



## Financial Planning Association of Colorado Annual Forum

Partners can attend our 2nd Annual Forum, our flagship program for free, up to 2 representatives. Reserve your space at our all-day event to network with 130-150+ attendees.

### Chapter meeting format: 8 per year

Our chapter meetings create opportunities for partners and members to network regularly and build relationships. At each chapter meeting, we provide a 30 minute networking session prior to the start of the educational program.

### Partner Ambassador Program

According to last year's partners, our Ambassador Program was a smashing success and is a tangible demonstration of our chapter's commitment to our partners. At each chapter meeting, every partner is assigned an Ambassador for the event. The Ambassador is a member of the Colorado Chapter's Board of Directors. Their goal is to introduce the partner to new members and help facilitate connections on behalf of the partner.

#### ■ **RECOGNITION**

Gain visibility as an FPA of Colorado Partner throughout the year through a variety of opportunities; monthly chapter meetings, our website, and electronic newsletters.

#### ■ **EXPOSURE**

Be in front of our membership on a consistent basis. The financial professionals you'll meet through the FPA of Colorado chapter can help you build long-term business relationships. FPA of Colorado members are a highly targeted market for your product or service.

#### ■ **EXHIBIT TABLE**

Members are continually looking for information on new products and services to meet their clients' needs. Display your materials at the chapter meetings to a targeted audience.

Diamond and platinum sponsors are invited to display materials at the chapter meeting of their choice.

#### ■ **OPPORTUNITIES**

You have the opportunity to meet and share your message with attendees at the chapter meetings and social gatherings. It's an excellent time to collect business cards for follow-up marketing.

Partnerships are available on a first-come, first served basis. Limited availability.

## ABOUT THE COLORADO FPA

The FPA of Colorado has approximately 550 financial professional members, representing a broad spectrum of specialties including financial planning, broker dealer services, insurance and annuities, mutual funds, banks/thrifts/trust, law, investment management, and accounting. The entire FPA membership totals nearly 28,000 and continues to grow.

## COLORADO CHAPTER OFFICE

# BENEFITS AT A GLANCE 2018

## FORUM, CHAPTER MEETINGS AND HAPPY HOUR

### Annual Forum:

Attendance for two people	•	•	•
Top-billing and prominent display location	•		
Exhibitor table – 5 ft length, add brochures and cards, place for pull-out banner in keynote room	•		
Exhibitor table – cocktail table for small brochures and cards, place for pull-out banner in keynote room		•	
Cocktail table for small brochures, cards, etc.			•
Introduction of one keynote speaker	•		
Introduction of one breakout session presenter		•	
Listing on the FPA website as a Forum Partner with link to your website	•	•	
Your company name and logo in the Forum program			•
Electronic list of Forum attendees	•	•	•
Meals, snacks, and refreshments throughout the event	•	•	•
Recognition through partner door prizes (if desired)	•	•	•
10 minute presentation at chapter meeting	•		
5 minute presentation at chapter meeting		•	
20 minute presentation to the Board of Directors	•		
1 branded, sponsored happy hour at no additional cost	•		
4 free registrations for a non-FPA member to attend chapter meeting as partner's guest	•		
2 free registrations for a non-FPA member to attend chapter meeting as partner's guest		•	
No cost admission to 8 chapter meetings for 2 partner representatives	•		
No cost admission to 8 chapter meetings for 1 partner representative		•	
Member rates for chapter meetings			•
Holiday party attendance	•	•	
Invitation to chapter social events	•	•	•
First right of refusal for sponsorship of additional member events	•		

## MEMBERSHIP COMMUNICATIONS

Electronic list of COFPA members, name and business address	•	•	
Semi-annual partner highlight with partner-provided content in member newsletter		•	
Quarterly partner highlight with partner-provided content in member newsletter	•		
Company logo and contact information on website and in weekly newsletter	•	•	•

	<b>\$5,500</b> DIAMOND	<b>\$3,850</b> PLATINUM	<b>\$1,895</b> GOLD	<b>\$500</b> SILVER
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Top-billing and prominent display location	•			
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Electronic list of Forum attendees	•	•	•	
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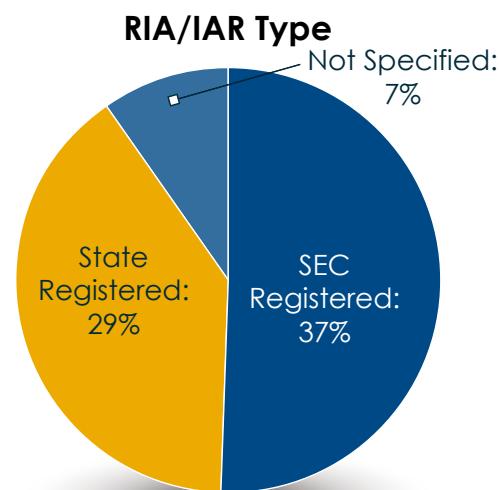
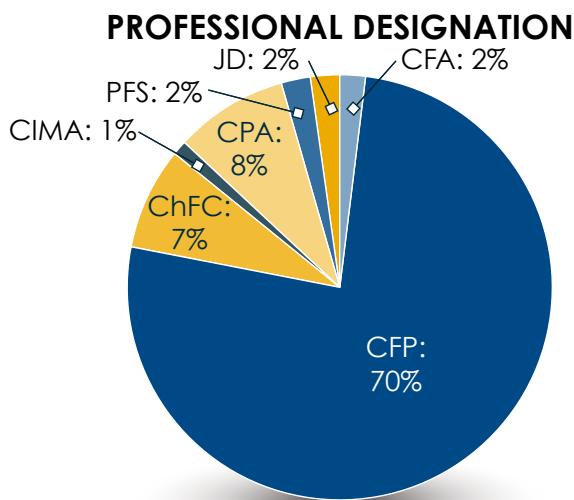
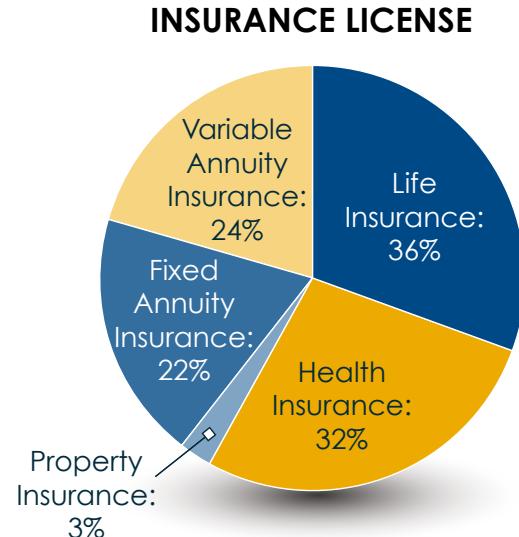
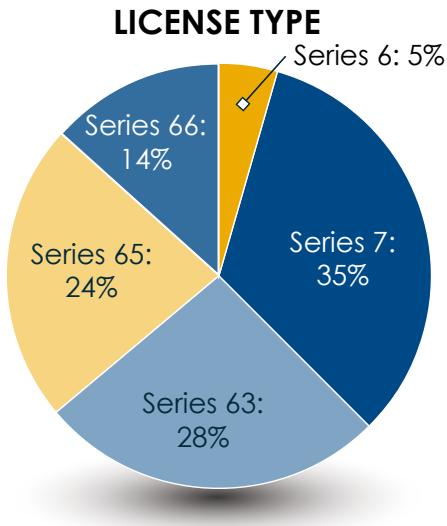
## COLORADO CHAPTER OFFICE

# CHAPTER PROFILE 2018



OF COLORADO

Reporting out of 548 total Colorado Chapter members from FPA National as of September 1, 2017.



## COLORADO CHAPTER OFFICE

13611 E. 104th Ave., Ste 800, PMB 302, Commerce City, CO 80022 303.450.0515 info@cofpa.org www.cofpa.org

Partner agrees to the above terms, and hereby applies for a partnership with the COFPA as a:

**DIAMOND PARTNER \$5,500**    **PLATINUM PARTNER \$3,850**

**GOLD PARTNER: \$1,895**    **SILVER PARTNER \$500**

Amount paid: \$ \_\_\_\_\_ Payment type (send check/credit card payment with registration form):

CHECK    CREDIT CARD (MasterCard, Visa, American Express or Discover accepted)

Credit card number \_\_\_\_\_ Exp. date \_\_\_\_\_ CVV code \_\_\_\_\_

Signature \_\_\_\_\_

(required for credit card only)

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## COMPANY INFORMATION:

Company name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Toll free number \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

## MAIN CONTACT INFORMATION:

Name \_\_\_\_\_ Title \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

## ALTERNATE CONTACT INFORMATION:

Name \_\_\_\_\_ Title \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

MAIL TO: Debbie Reece, Sponsor Coordinator, 13611E. 104th Avenue, Ste 800, PMB 302, Commerce City, CO 80022

E-MAIL TO: info@cofpa.org

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## RESPONSIBILITIES OF PARTNERS WILL INCLUDE:

- Prompt payment of annual partnership fee. Sponsorship month booth location are assigned on a first-come, first-served basis.
- 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.

## FPA OF COLORADO MAY:

- At its sole discretion, accept, deny, non-renew, and/or terminate Partner.
- 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.
- Change the Partnership fees and/or benefits and/or prompt payment discount at renewal within a 30 day notice.

Cancellation to partnerships after they are received can be made, minus a \$50 administration fee.

### COLORADO CHAPTER OFFICE

All publicity should list our company name as: \_\_\_\_\_

## DIAMOND PARTNER \$5,500

My chapter meeting exclusive sponsorship preference with ten minute presentation is (please rank top two choices):

- JANUARY       FEBRUARY       MARCH       APRIL  
 JUNE       JULY       OCTOBER       NOVEMBER

I have submitted artwork (*tif, gif or jpg preferred*) for a 2 inch x 2 inch ad in four issues of the E-newsletter.

My top four month choices for newsletter inserts are (please rank 1st to 4th):

- JANUARY       FEBRUARY       MARCH       APRIL       JUNE  
 JULY       AUGUST       SEPTEMBER       OCTOBER       DECEMBER

Our company website address is: \_\_\_\_\_

I have emailed our company logo to you at: [sponsorship@cofpa.org](mailto:sponsorship@cofpa.org) (*eps, tif, gif, or jpg preferred*)

## PLATINUM PARTNER \$3,850

My chapter meeting exclusive sponsorship preference with ten minute presentation is (please rank top two choices):

- JANUARY       FEBRUARY       MARCH       APRIL  
 JUNE       JULY       OCTOBER

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## GOLD PARTNER \$1,895

Our company website address is: \_\_\_\_\_

I have emailed our company logo to you at: [sponsorship@cofpa.org](mailto:sponsorship@cofpa.org) (*eps, tif, gif, or jpg preferred*)

## SILVER PARTNER \$500

Our company website address is: \_\_\_\_\_

I have emailed our company logo to you at: [sponsorship@cofpa.org](mailto:sponsorship@cofpa.org) (*eps, tif, gif, or jpg preferred*)

### COLORADO CHAPTER OFFICE