



OF *COLORADO*

A large photograph of a sunflower field at sunset. The sun is low on the horizon, casting a warm orange and yellow glow across the sky and the field. The sunflowers are in full bloom, with bright yellow heads and dark green leaves. The background shows a range of mountains under the colorful sky.

2018

Partnership Program

PARTNERSHIP COORDINATOR

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

 303.450.0515  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.

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.

■ 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.

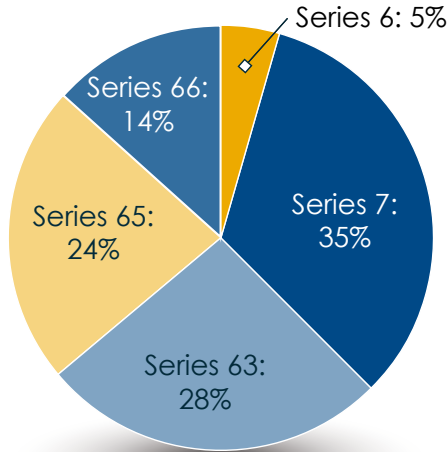
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	\$5,500	\$3,850	\$1,895	\$500
FORUM, CHAPTER MEETINGS AND HAPPY HOUR	DIAMOND	PLATINUM	GOLD	SILVER
Annual Forum:				
Attendance for two people	•	•	•	
Top-billing and prominent display location	•			
Exhibitor table – 5 ft length, add brochures and cards, 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	DIAMOND	PLATINUM	GOLD	SILVER
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	•	•	•	•

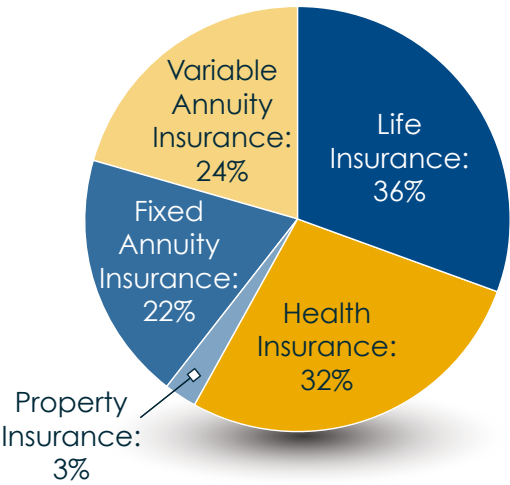
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Reporting out of 548 total Colorado Chapter members from FPA National as of September 1, 2017.

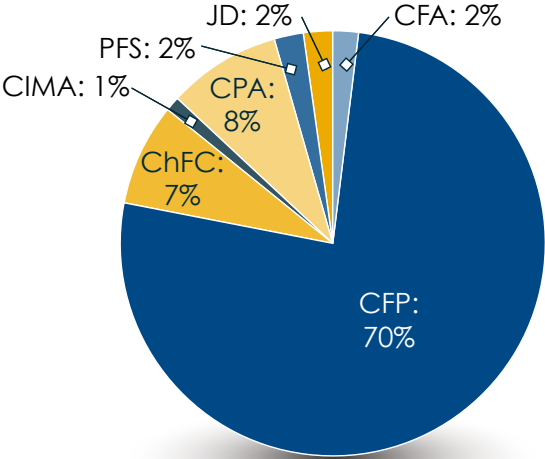
LICENSE TYPE



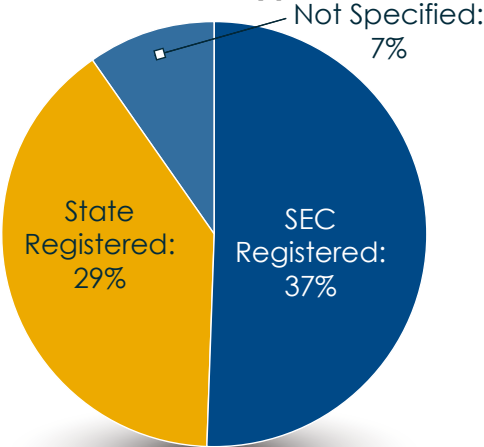
INSURANCE LICENSE



PROFESSIONAL DESIGNATION



RIA/IAR Type



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)

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

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.

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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 (*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

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

SILVER PARTNER \$500

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