



**FINANCIAL
PLANNING
ASSOCIATION**

ILLINOIS



PARTNER PACKAGES 2026

CHAPTER CONTACT
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**FINANCIAL PLANNING ASSOCIATION
OF ILLINOIS**

[HTTPS://WWW.FPAILLINOIS.ORG](https://www.fpaillinois.org)



QUICK FACTS

FPA of Illinois has an average of over 580 financial professional members representing a broad spectrum of specialties including financial planning, broker dealer services, insurance/annuities, mutual funds, law, CPA's, banks/thrifts/trust, investment management, accounting, estate attorneys, and tax specialists.

Our Members by the Numbers:

- 30% - Broker / Dealers
• 52% - are over 40
• 61% - RIAs
• 70% - CFP®'s
• 85% - are located in the Greater Chicagoland area.

ABOUT US

PARTNER BENEFITS

PERSONAL CONNECTIONS

FPA of Illinois is developing some exciting new avenues to keep our partners connected with our members. We held many in-person events in 2025 and are planning more in 2026 including the return of our lunch & learn, Mentorship program, and NexGen events. Of course, all of our level Partners get an exhibit table at our Conference for Advanced Planning.

RECOGNITION

You'll get visibility as an FPA of Illinois partner throughout the year at all chapter events, all communications, and on our website.

EXPOSURE

You are encouraged to attend all FPA of Illinois events where we will proudly introduce you to our membership. The financial professionals you'll meet through the FPA can help you build long-term business relationships. Members are continually looking for information on new products and services to meet their clients' needs.

OPPORTUNITIES

You can meet and share your message with attendees at all chapter events. If you would like to host a social event, luncheon or something else, just let us know!

2026 EVENTS (Tentative)

Q1

- Lunch & Learn
• NexGen Social
• Mentorship Program Kick-Off
• ProBono Event

Q2

- Lunch & Learn
• New Member Social
• Ethics Course
• ProBono Event

Q3

- Conference for Advanced Planning
• Post-Conference Social
• Give-Back Social
• NexGen Social

Q4

- Lunch & Learn
• Mentorship Wrap-Up
• Ethics Course
• Year End Holiday Event





Partner Benefit Packages for 2026

Value	Leading Partner \$6,700* <i>SOLD OUT</i>	Connecting Partner \$5,200* Limited to 8	Impact Partner \$3,700*	Event Sponsor \$2,000 or more**	Virtual CE Event Sponsor \$800***
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**FPA OF ILLINOIS CONFERENCE FOR ADVANCED PLANNING (CAP) –
Morningstar HQ, Date Friday, October 16, 2026**

Provide general session speaker for CAP 2026	\$5,000	√				
Exhibit table + pre/post event attendee list	\$2,500	√	√	√		
Complementary CAP registration for Partner representative(s). Note: Additional registration for Partner representatives can be purchased for cost of food & beverage.	\$450 EA	3 Total	2 Total	2 Total		
Complimentary CAP registration to be shared with advisor clients	\$450 EA	2 Total	2 Total	1 Total		
Promotion of your company on all CAP Conference marketing	\$1,000	√	√	√		
Board Member Ambassador assigned to help with personal introductions	Priceless	√	√			

PARTNER-TO-MEMBER CONTACT

Host Virtual Event - Educational Session or Practice Management (your content or outside presenter) and attendance list. (<i>Selection of CE Educational / Practice Mgt. Session opportunities are on a first-come, first-served basis</i>)	\$750	√	√			√
Exhibit space at all chapter in-person events (when space allows)	\$800 EA	√	√	√	√ At event	
Attendee list at registered in-person events	\$600 EA	√	√	√	√ From event	√ From event
Complementary registrations to all chapter in-person events (one may be used for advisor client)	\$55 EA	4 Total	3 Total	2 Total	3 Total	
Quarterly membership list	\$2,000	√	√	√	√	
**Additional opportunities sponsor, host networking or social events	Priceless	√	√	√		

SOCIAL MEDIA / WEBSITE / VIRTUAL / EMAIL ADVERTISING

NEW in 2026! "Tip of the Week/Month" in E-Blasts: submit a very short (1-2 sentence), non-promotional financial/practice management tip to be included in the chapter's regular member e-blasts. The tip would conclude with partner's name & email.	\$500 EA	√	√			
NEW in 2026! "Partner Spotlight" post on the Chapter's social media channels (LinkedIn, Facebook, Instagram).	\$500 EA	4 Total	2 Total	1 Total		
Recognition on Chapter social media channels - LinkedIn, Facebook, Instagram	\$500	√	√	√	√**	√**
Dedicated e-blasts to membership (sent through Chapter email platform)	\$500 EA	4	2	1		
Firm logo & link to company website on Chapter website	\$600	√	√	√	√**	√**
Regular recognition as Corporate Partner in Chapter communications	\$2,000	√	√	√	√**	√**

* 5% discount if paid by December 20, 2025

** In-Person Event: This benefit covers either making your company a named sponsor for an already scheduled event or creating a stand-alone event. Let's talk!

*** Virtual CE Event Partner will receive name and logo recognition while event is being marketed and post-event