



FINANCIAL  
PLANNING  
ASSOCIATION  
—  
GREATER  
KANSAS CITY

## 2023 FPA of Greater Kansas City Symposium

August 29, 2023

Embassy Suites Olathe

### SPONSOR AND EXHIBIT OPPORTUNITIES

The FPA of Greater Kansas City Third Annual Symposium will take place in-person on August 29, 2023 at the Embassy Suites Conference Center in Olathe. We are planning a day filled with industry networking, professional development, continuing education and skill building, all while supporting and promoting the great profession of financial planning. Our goal is to give you an excellent opportunity to develop profitable relationships with FPA members and other financial professionals through this event. We anticipate approximately 200 attendees.

#### **Symposium Sponsor \$1,500** *(included with Chapter Platinum Partnership Package)*

- Symposium Sponsors receive all of the benefits of workshop sponsors and exhibitors as listed below (only one attendee).

#### **Workshop Sponsor \$1,250\***

- One 50 minutes educational session. **You must include a detailed description of the session including speaker bio and timed outline by July 1.** The FPAGKC Board will approve all content prior and it must qualify for CFP CE.
- One symposium registration.
- Listing in the FPA of Greater Kansas City chapter newsletter as a Symposium Sponsor.
- Promotion and logo placement on the FPA of Greater Kansas City website ([www.fpac.org](http://www.fpac.org)).
- Logo in the conference program, materials, and signage.

*\*Gold Chapter Partners receive a discounted Workshop Sponsorship at \$750*

#### **Exhibit Booth \$750** *(included with Chapter Gold Partnership Package)*

To maximize your exposure to attendees, booths will be arranged outside the main meeting room where all breaks and the reception will be held. This arrangement will allow conversations to be held throughout the day during various breaks.

- One 6' table with two chairs, exhibitors may bring in displays as long as it fits around or inside their booth space. Basic power outlets will be accessible, however, we encourage you to bring your own extension cords since your booth may not be directly next to an outlet.
- One booth attendee. Additional registrations can be purchased.
- Listing in the FPA of Greater Kansas City chapter newsletter as a Symposium Exhibitor.
- Promotion and logo placement on the FPA of Greater Kansas City website ([www.fpac.org](http://www.fpac.org)).
- Logo in the conference program, materials, and signage.

**Questions?** Please contact Brandy Johnson, Chapter Executive, [bjohnson@onefpa.org](mailto:bjohnson@onefpa.org) or Will Bohne, Programs Chair, [will@embarkfp.com](mailto:will@embarkfp.com).

Please check our website at [www.fpac.org](http://www.fpac.org) for the latest updates and information. You will also receive detailed emails from FPA regarding event details, reminders, booth assignments, set up times, etc.



Company \_\_\_\_\_

Web address \_\_\_\_\_

Email address \_\_\_\_\_

Primary contact \_\_\_\_\_

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

Mailing address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

**Please initial next to your desired level:**

- \$1,500 Symposium Sponsor (included in Chapter Platinum Partner Package)
- \$1,250 Workshop Sponsor (must include a description of your presentation with this form)
- \$750 Discounted Workshop Sponsorship (for current Gold Partners)
- \$750 Exhibit Booth (included in Chapter Platinum and Gold Partner Package)
- \$200 each Additional Personnel

Booth Personnel:

Name \_\_\_\_\_ Email \_\_\_\_\_

Name \_\_\_\_\_ Email \_\_\_\_\_

**PAYMENT OPTIONS**

Enclosed is a check in the amount of \$\_\_\_\_\_

Please invoice me for \$\_\_\_\_\_

Credit Card. In order to minimize risk to your credit card, we utilize AffiniPay to process all credit card payments. If you would like to use your card, an invoice with a secure link to our processing site will be sent so you can enter your information to complete the transaction. Please provide the email you wish to have the invoice sent to:  
\_\_\_\_\_

*Submitting this signed form by email or mail will reserve your sponsorship or exhibit booth. Payment must be received within 30 days of invoice.*

*Cancellations must be submitted in writing and received on or before August 4. There will be no refunds for cancellations received after August 4.*



Speaker Name \_\_\_\_\_

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

Secondary Contact \_\_\_\_\_

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

Mailing address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

**Session Topic:**

**General Financial Planning Track (CE Eligible)**

Retirement Distribution and Income Planning  
Behavioral Finance  
Education Planning  
ERISA Plans  
Family Philanthropy  
Planning Software Training  
Tax Law Changes  
Cybercrime and Consumer Protection

**Advanced Planning Track (CE Eligible)**

Long Term Tax Minimization (unrelated to insurance products)  
Business Exit Planning  
Charitable and Irrevocable Trusts  
Family Philanthropy and Generational Planning

**Practice Leadership Track (Not CE Eligible)**

Practice Metrics and Benchmarking  
Talent Acquisition and Employee Development  
SEC Initiatives and Enforcement Topics  
Ownership Structures & Operating agreement considerations

**Information needed for our records and marketing purposes:**

What is the title of your presentation? \_\_\_\_\_

1 – 3 paragraph description of what your session will cover (attach)

Your photo in jpg format – must be equal to or less than 150 KB (attach)

Your biography in word format (attach)

**Information needed to submit program for CFP and Insurance CE:**

Learning Objectives: All CFP CE programs must contain a minimum of one learning objective, which is a specific, measurable statement of what participants will learn in the program. Learning objectives must be realistic, considering the level of complexity and program outline.

List 2-3 Learning Objectives Here:

**Levels of Complexity:** All CFP CE programs must specify the level of complexity that describes the knowledge level of the program: Overview, Intermediate or Advanced. Please select from list below:

**Overview:** Programs provide a general review of a subject from a broad perspective or dive into basic knowledge on a specific skill or topic. Best suited for CFP® professionals seeking knowledge in an unfamiliar subject area and with entry level experience.

**Intermediate:** Programs build upon knowledge that would be covered in an “overview” level program or assume that working knowledge in the subject to be covered is a prerequisite. Best suited for CFP® professionals who have previous exposure to the subject being covered and at least 3 years of industry experience.

**Advanced:** Programs build upon knowledge that would be covered in an “intermediate” level program or assume that detailed knowledge in the subject to be covered is a pre-requisite. Best suited for CFP® professionals with seasoned industry experience who have intermediate knowledge of the subject being covered.

Please select which of these **8 Principal Knowledge Topic Categories** for CFP your presentation will address. Choose only ONE:

- Professional Conduct and Regulation
- General Financial Planning Principles
- Psychology of Financial Planning
- Risk Management and Insurance Planning
- Investment Planning
- Tax Planning
- Retirement Savings and Income Planning
- Estate Planning

Any other requests or information we need for your session to be a success? \_\_\_\_\_

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