



FINANCIAL  
PLANNING  
ASSOCIATION  
—  
GREATER  
KANSAS CITY

## Your Partnership Opportunities



Financial Planning Association  
of Greater Kansas City

2022 Partnership Program



## Financial Planning Association of Greater Kansas City

### Chapter at a Glance

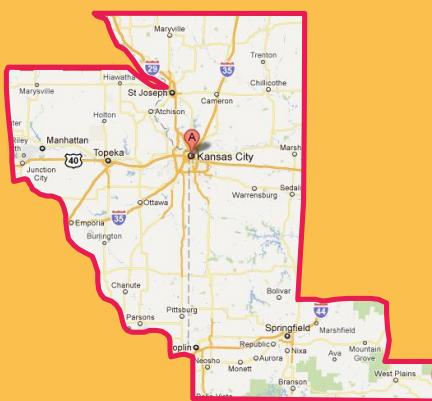
NUMBER OF MEMBERS:  
Approximately 320

### CHAPTER DEMOGRAPHICS:

- **66%** CFP® professionals
- **24%** life insurance license
- **21%** health insurance license
- **32%** SEC registered RIAs
- **21%** Series 7
- **17%** variable annuity license
- **20%** state registered RIAs

### Chapter Meetings:

The FPA of Greater Kansas City hosts six chapter meetings throughout the year. Each chapter meeting is structured to facilitate networking as well as to provide CFP® and Missouri/Kansas Insurance Continuing Education credits.



# Special Events

## Symposium

We host an annual one-day symposium offering education, exhibit booths and social opportunities.

## Career Day

Annual event designed to engage future members of our profession. We partner with colleges and universities from around the region to promote financial planning as a career choice. Typically, around 50 college students attend this half-day workshop.

## Social Event

Following our May ethics chapter meeting, and two of our fall chapter meetings, we host social events for members, guests and partners.

## Other Chapter Events

Our chapter hosts many additional events throughout the year. These range from public education events like pro bono financial planning seminars, or a TV news call-in show, to social events like NexGen happy hours and other specialized events.



We are thrilled about your interest in helping us deliver a first-class member experience. A partnership with you will provide us with a wealth of opportunities including the ability to bring in nationally recognized speakers. What this means for you as a partner of FPAGKC is that you will enjoy a vast exposure to more financial planning professionals. Our mission is to serve our members by providing educational, networking and mentoring opportunities, representing their professional interests to the government, and promoting the value of financial planning to the public.

We strive to offer superior resources and opportunities to our members, and partnerships are critical to the ongoing success of our organization and mission. By partnering with the FPAGKC, you will have direct access to financial services professionals in the Greater Kansas City area, northern Kansas and western Missouri. Our members include financial planners, brokers, insurance professionals, attorneys, CPAs, trust specialists, banking professionals and more — all dedicated to providing the most valuable products, services and advice to the clients they serve.

Recognition as a chapter partner will allow you to sponsor our organization and reinforces your commitment to the success and growth of our membership, as well as the financial planning profession. In addition to receiving recognition at our chapter meetings and events, you will have the opportunity to make connections, build relationships, engage in conversation, and exchange knowledge with key decision makers in the financial planning industry in the Kansas City area.



Should you have questions, please contact  
Jacob Watts, CFP®, CRPC®, APMA®  
2022 FPA of Greater Kansas City  
Partnership Chair  
(785) 423-1386  
jacob.watts@legacykc.com

## Total Benefits Package

Benefit	Platinum	Gold	Silver	Bronze
<b>Meetings</b>				
One chapter meeting sponsorship / 10 minute presentation	●			
One monthly chapter meeting co-sponsorship w/ 5 minute presentation		●		
Attendee list from sponsored meeting	●	●		
One annual pass to all monthly chapter meetings (two attendees per meeting, cannot be carried over)	●			
One annual pass to all monthly chapter meetings (one attendee per meeting, cannot be carried over)		●	●	
Recognition during all chapter meetings & via PowerPoint display at events	●	●	●	●
<b>Advertising *newsletters are monthly</b>				
Feature article in one newsletter – up to a page	●			
Ad in chapter newsletter – up to a page	●	●		
Dedicated personalized page on chapter website	●			
Firm logo & link to company website	●	●		
Firm name & contact info on website	●	●	●	●
Firm recognition in all chapter newsletters and weekly e-newsletters	●	●	●	●
<b>Other Events</b>				
50 minute session at Symposium	●			
Booth at Symposium	●	●		
Chapter-marketed/partner-sponsored roundtables or happy hour events with financial assistance up to \$400	●			
Chapter-marketed/partner-sponsored roundtables or happy hour events (no financial assistance)	●	●	●	
Booth space & one registration at Career Day Event	●			
<b>Partner Contribution</b>	\$6,000	\$4,000	\$2,000	\$750

\* Number of Platinum Partners is limited to six per year. Once approved as a Platinum Partner, you will have the first opportunity to renew your partnership each year. In-kind contributions may be considered for partnership benefits with prior approval of the Board of Directors.



## About FPA

The Financial Planning Association is the largest membership organization for personal financial planning experts in the U.S. and includes professionals from all backgrounds and business models. We help connect thousands of consumers to competent and ethical planners who uphold the FPA Standard of Care.

Members of FPA are those who commit to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve. They deliver advice using an objective, client-centered, ethical process. FPA membership consists of financial planners and all those who support the financial planning process. FPA's nationwide network of nearly 100 chapters encourages professional development and networking on a local level.

FPA invites you to become partners in our mission. By partnering with FPAGKC, you demonstrate a commitment to the financial planning profession and high ethical standards and help us strengthen the financial planning community.

## Testimonials

*"American Century Investments' partnership with the Financial Planning Association of Greater Kansas City along with our involvement with the Board of Directors allows us to connect with advisors and build relationships through the many valuable programs and events. The first partnership check that we write every year is to the FPA. We are privileged to be a continued partner and member of the chapter."*

~ Evan C. Mayhew, Vice President, National Accounts,  
American Century Investments

*"Through our sponsorship of the FPA of Greater Kansas City, our team is able to connect with local financial advisors who partner with the Community Foundation to establish donor-advised funds for their charitable clients. We value the relationships we're able to cultivate and foster through chapter meetings, partner events and programs."*

~ Chris Rigsby, Relationship Manager,  
Greater Kansas City Community Foundation

### FPAGKC

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### Jacob Watts, CFP®, CRPC®, APMA®

2021 FPA of Greater Kansas City Partnership Chair

(785) 423-1386

[jacob.watts@legacykc.com](mailto:jacob.watts@legacykc.com)





Company \_\_\_\_\_

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

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

*For use on our website*

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

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

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

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

**Please initial next to your desired partnership level.**

Platinum Partner \$6,000        Silver Partner \$2,000

Gold Partner \$4,000        Bronze Partner \$750

By initialing above and signing below, I understand that this agreement serves for a period of one year ending Dec. 31, 2022, and the fee is nonrefundable.

\_\_\_\_\_  
Signature of company representative

\_\_\_\_\_  
Date

### 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 QuickBooks 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:\_\_\_\_\_

Upon receipt of this form, you will be contacted by a member of the FPAGKC partnership team.

**Mail to: FPAGKC PO Box 4303 • Topeka, KS 66604**

**Email to: bjohnson@onefpa.org**