



FINANCIAL
PLANNING
ASSOCIATION

CHARLOTTE

2021 PARTNERSHIP PROGRAM

Partnerships are as much of a cornerstone to our success as are our members. Our partners make it possible for us to continue to offer high-quality education, networking events and other opportunities that provide value to our members.

Partnership Ambassador Program:

The Partnership Ambassador Program is designed to ensure we are supporting your efforts to reach the audience within membership that will most benefit you. Through the PAP, you will be assigned one (1) member whose responsibility will be to be your Ambassador to the entire membership. They will work with you to identify any target markets you wish to connect with, be responsible for introducing you to members at meetings and events, and work with you on how to get the most out of your partnership with FPA of Charlotte.

Monthly Meetings and Events:

FPA of Charlotte is currently planning to host a variety of events for 2021. For at least the first two quarters we will continue to meet virtually. We realize that in person opportunities are of more benefit to you and we are planning to revisit the possibility of hosting in person events for the third and fourth quarters of 2021.

Here is a list of the types of events we have planned for the first six months:

- A 5-part Practice Management Series
- Monthly Board Meetings
- Continuing Education Sessions
- Small Group Discussions
- Networking/Happy Hour/Game Nights

Annual Symposium:

The Annual Symposium is held in the fall each year and we are currently planning to move forward with an in-person event for 2021.

Networking and Social Events:

Partners are invited to all networking and social events the chapter hosts. There may be opportunities for companies to enhance their visibility with additional offerings associated with such event that will be announced as they arise.

Member Outreach:

Our goal is to help you reach your targeted ROI and we have several tools and communication channels at our disposal to assist in that goal. We will work with you one-on-one to determine the best way to reach your target market within our membership and prospective membership.

Bonus:

There are many bonus opportunities for our partners. We hope that you will find them valuable. If you can think of other ways we can help you improve your ROI, please let us know.

2021 PARTNERSHIP MATRIX

	LEADING PARTNERS	CONNECTING PARTNERS	IMPACT PARTNERS	COMMUNITY PARTNERS
	\$5,000	\$3,500	\$2,000	\$1,000
Practice Management Series				
Opportunity to provide a speaker/content	1	1	1	
Board Meetings				
Opportunity to participate in a Chapter board meeting	1	1	1	1
Virtual CE				
Priority consideration for speaker/topic suggestions	Y	Y		
Private virtual networking rooms	4	3	2	1
Opportunity to act as moderator for a webinar	Y	Y		
Opportunity to serve on a panel for a webinar	Y	Y	Y	Y
Opportunity to provide content for Chapter to post on various channels post-event		Y	Y	
1 minute pre-recorded video message to attendees	Y	Y	Y	
	Y	Y		
Symposium				
10 minute presentation to attendees	Y			
2 minute pre-recorded video message to attendees		Y	Y	
Display table	Y	Y	Y	Y
Social Media pre-, during and post-virtual event on LinkedIn, Twitter, Instagram and Facebook	Y	Y	Y	
Priority consideration for speaker/topic suggestions	Y	Y	Y	Y
Small Group Discussions				
Opportunity to host/moderate small group discussion	3	2	1	1
Bonus!				
Opportunity to submit research, case studies or white papers for members and non-members to download	Y	Y	Y	
Opportunity to collaborate with the Chapter to determine member demographics to target	Y	Y	Y	Y
12-months of social media promotion	Y	Y	Y	Y

	LEADING PARTNERS	CONNECTING PARTNERS	IMPACT PARTNERS	COMMUNITY PARTNERS
	\$5,000	\$3,500	\$2,000	\$1,000
Submit content for monthly newsletters	4	3	2	1
Submit social media posts monthly which we will tag you in	4	3	2	1
Submit ads for monthly newsletter	4	3	2	1
Submit any continuing education events offered by your company may be offering in the Charlotte area for inclusion on our Partner Event Calendar (new this year).	Y	Y		
Submit news items related to your company for inclusion in our Chapter News section on the website.	Y	Y	Y	
If you are an Allied Professional Member of FPA you can opt to insert a video clip into your membership profile which is searchable by FPA members from across the country.	Y	Y	Y	Y
Ambassador Program				
One dedicated chapter members assigned to be your Partnership Ambassador	Y	Y	Y	Y

Ready to partner or have questions? Contact Nancye Bailey at nbailey@onefpa.org or call 803.238.7438.