

2025 PARTNERSHIPS

FPA PUGET SOUND



Your Partner in Planning™



FINANCIAL
PLANNING
ASSOCIATION

PUGET SOUND

Reach our 400 members through a year-long partnership with FPA Puget Sound

Join FPA Puget Sound in elevating the financial planning profession.

We appreciate your interest in becoming a sponsor of the FPA Puget Sound chapter. By partnering with us, you play a crucial role in advancing education and development within the financial planning industry. As a sponsor, you will have the unique opportunity to connect with leading individuals and organizations that are at the forefront of industry knowledge and expertise.

Sponsoring FPA Puget Sound not only enhances your organization's visibility but also raises awareness of your brand within the financial planning community. With the Financial Planning Association boasting 80 chapters and over 18,000 members nationwide, your sponsorship will resonate far beyond just our local 400-member base. In fact, FPA Puget Sound actively engages with an additional 500 prospective members, allowing you to promote your services and connect with a wider audience regularly.

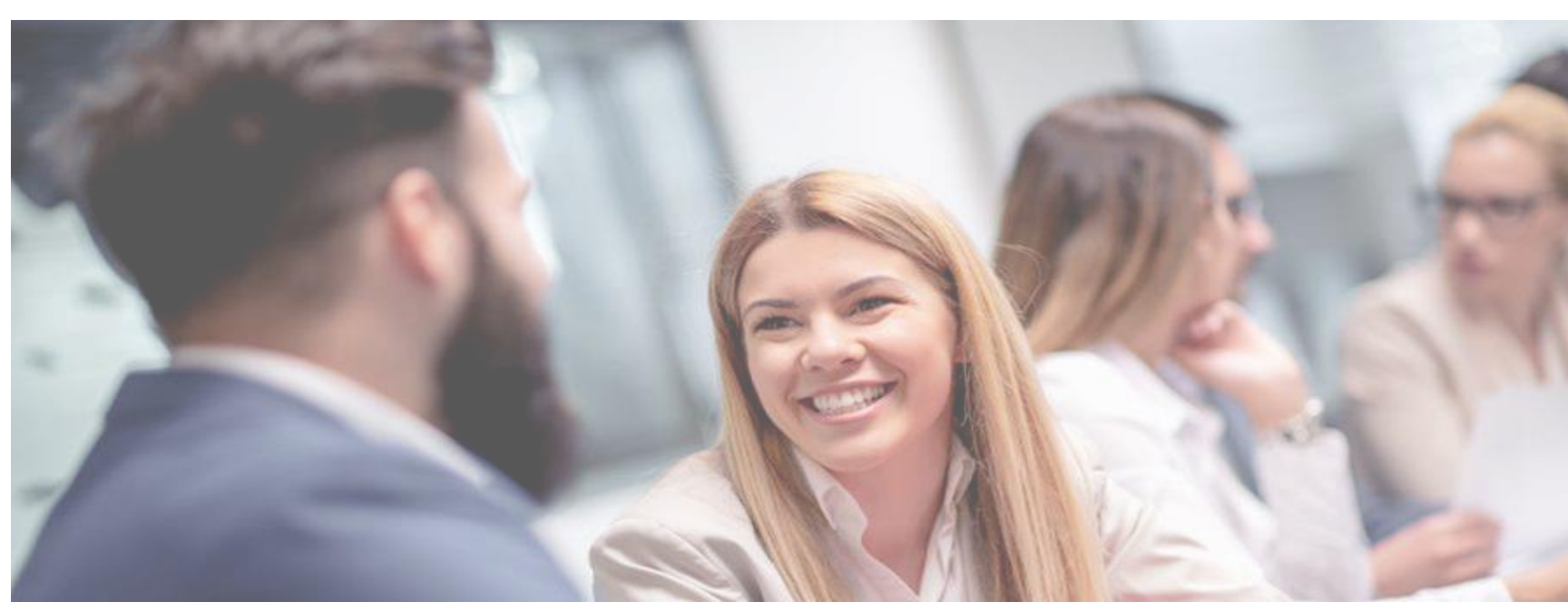
Join us in our mission to educate and empower financial professionals and let us help you elevate your organization's profile in the process. Together, we can make a significant impact in the financial planning industry.

For questions, please reach out to the FPA Puget Sound Executive Director, Melisa Hall: (206) 501-2161, info@fpapugetsound.org for assistance. We appreciate your interest in sponsoring FPA of Puget Sound and look forward to partnering with you in 2025.

2025 Annual Sponsorship Levels	Annual Dues
Platinum	\$5,000
Gold	\$3,500
Silver	\$2,000

2025 FPA Puget Sound Symposium Sponsorships

See page 5-6 for symposium sponsorship opportunities and pricing



OUR VISION FOR OUR PARTNERS

To develop a long term professional and mutually profitable relationship with our partners and to create an excellent working relationship between our members and partners. Let's do something powerful and lasting together!

500+

member firms
represented



18,000+

Members Nationwide



80+

Chapters in the U.S.

Where Financial Planning Practitioners Come Together.

FPA's commitment is to elevate the financial planning profession through collaboration and connection. At FPA Puget Sound, our members recognize that as we grow and develop as practitioners and planners, we enhance our ability to serve our clients effectively, both now and in the future. In today's rapidly changing business environment, the importance of staying connected cannot be overstated.

FPA Puget Sound serves as your essential gateway to a network of over 400 dedicated professionals located in the Puget Sound area and beyond. Our chapter is not just about numbers; it represents a vibrant community of practitioners who share a common goal of advancing the financial planning profession. Additionally, our reach extends to over 500 prospective members who are eager to join this dynamic community.

We invite you to engage with us, expand your professional network, and enhance your skills. Together, we can ensure that we are not only meeting the needs of our clients today but also preparing for the challenges and opportunities of tomorrow. Join us in this endeavor and be part of a transformative movement within the financial planning profession.



40%

of our membership
are RIAs with over
320 Billion AUM

41%

of our members
are Registered Reps,
representing
89 broker dealers

80%

of our membership
are CFP®s with an
average of 11 years
of membership in FPA

The Value of Partnering with FPA of Puget Sound

CONNECTIONS

FPA Puget Sound is dedicated to fostering strong connections between our partners and members through the ongoing development of innovative avenues designed to enhance these relationships. Our commitment to providing both in-person and virtual opportunities ensures that you can effectively reach new clients and businesses while simultaneously reinforcing your existing connections.

PUT YOUR BUSINESS FRONT AND CENTER

You are encouraged to attend all FPA Puget Sound 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.

GAIN MORE EXPOSURE

You can meet and share your message with a target market at all chapter events. This is an excellent time to collect business cards for follow-up marketing and potential future business.

EXPOSURE

Exhibit space at the annual FPA Puget Sound Symposium (May 8, 2025) with anticipated attendance of 200+ participants. This gives you a premium opportunity to generate strong leads with leaders and decisions makers. This year's symposium will be returning to the [Seattle Convention Center Summit](#) building.



FPA OF PUGET SOUND

2025 ANNUAL PARTNERSHIP BENEFITS AT-A-GLANCE

BENEFITS	PLATINUM \$5,000	GOLD \$3,500	SILVER \$2,000
Website & Email Marketing			
Company logo displayed on FPA Puget Sound website home page	Linked Logo	Linked Logo	Linked Logo
Company logo displayed on all FPA Puget Sound email marketing	Linked Logo	Linked Logo	Linked Logo
Opportunity to provide advertisements for monthly e-newsletter, the <i>NewsFlash</i>	Three times a year	Once per year	
Opportunity to send two marketing emails to the chapter database (per year)	✓		
Annual Symposium			
Complimentary Symposium Registrations	②	①	
Promotion in all Annual Symposium Marketing (website, emails, program, signage)	✓	✓	
Exhibit Table at Annual Symposium	✓	✓	✓
Events & Training			
Opportunity to provide brochures/marketing materials at attended chapter meetings	✓	✓	✓
Company logo displayed in opening slide show at all chapter meetings	✓	✓	✓
Complimentary passes to all chapter meetings	②	①	①
10-minute sponsor spotlight at chapter meeting	①	①	
Copy of attendee list at each attended chapter meeting	✓	✓	
Opportunity to have one self-hosted educational webinar which FPA Puget Sound will market to the FPA database (must qualify for CE credits)	✓		



FPA OF PUGET SOUND

2025 SYMPOSIUM SPONSOR BENEFITS AT-A-GLANCE

SYMPOSIUM SPONSOR BASELINE BENEFITS

- ✓ Linked logo on Symposium webpage
- ✓ Logo on Symposium marketing & emails
- ✓ Access to attendee list
- ✓ Mention during chapter update
- ✓ Recognition in Symposium slide show
- ✓ *Complimentary registrations (based on tier)

TITLE SPONSOR - \$4,500 (SOLD OUT)

5-minute sponsor spotlight during opening remarks to introduce your company and offerings (may also include 1-2 min. video)	Featured logo on Symposium webpage
Logo signage for duration of the day on the main stage	Introduce keynote speaker
*2 complimentary registrations	Opportunity to provide company fliers on tables in general session room

SPEAKER SPONSOR - \$2,500

(THREE AVAILABLE)

- ✓ Exclusive invite only opportunity for Symposium breakout session
- ✓ Provide a speaker from your company to speak about services. Content must be educational (no sales) and CE eligible
- ✓ 5-minute sponsor spotlight & speaker introduction
- ✓ Company logo on Symposium website, signage, and program
- ✓ Company logo on Symposium website, signage, and program
- ✓ *1 complimentary representative, in addition to speaker
- ✓ (Optional) Discounted exhibit booth – additional \$1,000 add-on

LUNCH SPONSOR - \$2,000

(ONE AVAILABLE)

- ✓ 5-minute sponsor spotlight to introduce your company & offerings
- ✓ Company logo on Symposium website, signage, and program
- ✓ Opportunity to provide company fliers on lunch tables for attendees
- ✓ *2 complimentary registrations
- ✓ (Optional) Discounted exhibit booth – additional \$1,000 add-on

WIFI SPONSOR - \$1,000

(ONE AVAILABLE)

- ✓ Your company name as the WIFI network name
- ✓ Company logo all WIFI signage throughout the event (+ program)
- ✓ Company logo on Symposium website, signage, and program
- ✓ *1 complimentary registration
- ✓ (Optional) Discounted exhibit booth – additional \$1,000 add-on

NAME BADGE SPONSOR - \$900

(ONE AVAILABLE)

- ✓ Logo on all attendee name badges
- ✓ *1 complimentary registration

WINE DOWN SPONSOR - \$2,000

(SOLD OUT)

- ✓ 3-minutes to introduce your company at the end of the closing keynote session. Invite everyone to join the wine-down social hour!
- ✓ Announce the winner for next year's complimentary symposium registration
- ✓ Logo branded drink tickets provided to each guest
- ✓ Company logo on Symposium website, signage, and program
- ✓ *1 complimentary registration
- ✓ (Optional) Discounted exhibit booth – additional \$1,000 add-on

GENERAL SESSION SPONSOR - \$1,500

(SOLD OUT)

- ✓ Introduce closing keynote speaker
- ✓ 3-minute sponsor spotlight to introduce your company & offerings
- ✓ Company logo on Symposium website, signage, and program
- ✓ Opportunity to provide company fliers on lunch tables for attendees
- ✓ *1 complimentary registration
- ✓ (Optional) Discounted exhibit booth – additional \$1,000 add-on

GIVEAWAY SPONSOR - \$1,000

(ONE AVAILABLE)

- ✓ 2-minutes to introduce your company and offerings before the drawings
- ✓ *1 complimentary registration
- ✓ Company logo on Symposium website, signage, and program

BREAK SPONSOR - \$950

(TWO AVAILABLE – BREAKFAST or SWEET-TOOTH BREAK)

1. Company logo on Symposium website, signage, and program
2. Signage outside of breakroom
3. *1 complimentary registration



FPA OF PUGET SOUND

2025 SYMPOSIUM EXHIBITOR OPPORTUNITIES

EXHIBITOR BASELINE BENEFITS

- ✓ Two complimentary registrations
- ✓ Chance to connect with 150+ financial advisors
- ✓ Recognition during chapter update
- ✓ Logo on Symposium website & marketing materials
- ✓ Access to attendee list
- ✓ Networking during Symposium

EXHIBIT TABLE SPONSOR - \$1,850

- ✓ One six-foot draped exhibit table
- ✓ Two complimentary symposium registrations
- ✓ Logo on Symposium webpage, program and signage
- ✓ Additional registrations - \$250
- ✓ (Symposium sponsors may add on an exhibit table at a discounted rate when you sign up – see benefit sections on pg. 6)



BECOME A PARTNER!

VISIT US ONLINE OR REACH OUT TO THE OFFICE TODAY

We invite you to discuss potential partner opportunities in greater detail with us at the FPA of Puget Sound. If you're interested in exploring how we can collaborate, please reach out to our office at (206) 501-2161 or via email at info@fpapugetsound.org.

We want to remind you that all annual sponsorship packages will be based on the 2025 calendar year. This is a fantastic chance to align your organization's goals with ours and gain visibility within our community.

Additionally, please note that FPA of Puget Sound reserves the right to ensure that all membership literature, correspondence, and advertisement submissions adhere to our established policies and format regulations. We look forward to the opportunity to partner with you and create meaningful connections that benefit our mutual interests.