



**FINANCIAL
PLANNING
ASSOCIATION**

**DALLAS
FORT WORTH**

2025 PARTNERSHIPS



TABLE OF CONTENTS

Get to Know FPA DFW	2
Partner Vision	3
Benefits at a Glance	4
FPA DFW Conference	5
Become a Partner	6

Reach our DFW members through an annual partnership with FPA Dallas/Fort Worth

Join FPA Dallas/Fort Worth in elevating the financial planning profession.

Thank you for your interest in becoming a 2025 Corporate Partner of the FPA Dallas/Fort Worth (DFW) chapter. Your partnership is not just a sponsorship; it is a commitment to furthering the development of the financial planning industry. By joining us, you will gain direct access to a network of industry leaders and organizations that are at the forefront of financial planning knowledge and expertise. This connection is invaluable for enhancing your organization's profile and visibility in the industry.

At FPA DFW, we proudly announce our commitment to fostering meaningful partnerships with a diverse range of companies and organizations within the financial planning industry. We believe that collaboration is key to success, and we consider these partnerships to be true alliances aimed at enhancing the professional landscape for financial planners. Together, we are dedicated to equipping financial planners with the essential tools, resources, and experiences they need to excel in their careers.

We invite companies that are passionate about the growth of the financial planning profession and share our core values to explore the opportunity of partnering with the FPA DFW chapter. Our partnerships are designed to be year-long relationships that are built on mutual goals and a shared vision for impactful work.

To provide a clear understanding of what we offer, our Benefits-at-a-Glance page outlines the four partnership tiers, along with their respective benefits and pricing. Each partnership tier includes exhibit space at our Annual Conference, which will be held in person at the Irving Convention Center on February 13, 2025. This is a fantastic opportunity for partners to showcase their commitment to the profession and engage with financial planners from across the region.

Should you have any questions or require further information, please do not hesitate to contact our FPA DFW Partnerships Director, Joel Berg, at partnerships@fpadfw.org, or reach out to our FPA DFW Executive Director, Melisa Hall, at execdir@fpadfw.org or (972) 747-0407. We look forward to building a successful partnership with you.

2025 Sponsorship Level	Annual Dues
Diamond	\$8,500
Platinum	\$6,900
Gold	\$5,500
Silver	\$3,750



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!

350+

over 350 member firms represented



18,000

Members Nationwide



80

Chapters in the U.S.

49%

of our membership are RIAs with over 320 Billion AUM

41%

of our members are Registered Reps, representing 78 broker dealers

41%

of our membership are CFP®'s with an average of 14 years of membership in FPA

Where Financial Planning Practitioners Come Together.

At FPA DFW, our mission is to elevate the financial planning profession through collaboration, education, and support. Each member is committed to not only advancing their own expertise but also enhancing the overall quality of service provided to clients. In a rapidly evolving business landscape, the importance of staying connected cannot be overstated. With over 800 dedicated professionals in the Dallas/Fort Worth metroplex, our chapter serves as a vital link for practitioners seeking to expand their network and enhance their skills. Furthermore, our impact reaches beyond our current members, engaging an additional 900+ prospective members who are eager to contribute to and benefit from our collective knowledge and resources. Together, we can ensure that we are well-equipped to meet the diverse needs of our clients both today and in the future. Join us in this journey of professional growth and client service excellence.

The Value of Partnering with FPA of Dallas/Fort Worth

PERSONAL CONNECTIONS

At FPA DFW, we are committed to fostering strong relationships between our partners and members. Each month, we offer unique opportunities for our partners to engage with members through a broad range of events, allowing you to expand your reach to potential clients and businesses while also strengthening the bonds with your current clients. These platforms are tailored to create meaningful interactions and drive mutual growth. Join us in this endeavor to elevate your business connections and explore the myriad of possibilities that await as we work together to build a thriving community.

RECOGNITION

Throughout the year, our partners will enjoy prominent exposure at all chapter events, ensuring their brand is recognized and appreciated within our community. Our website will also serve as a dedicated space for showcasing our partners, allowing visitors to easily connect with them.

PUT YOUR BUSINESS FRONT AND CENTER

You are encouraged to attend all FPA DFW 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.

EXHIBIT

Every FPA DFW Corporate partner is guaranteed an exhibit booth at the Annual FPA DFW Conference, which is scheduled for Thursday, February 13, 2025. With an expected attendance of 350-400 participants, this event presents a unique and premium opportunity for businesses and organizations to connect with influential leaders and decision makers in the financial planning industry. By securing your exhibit space, you will not only gain visibility but also the chance to engage directly with potential clients and partners who are eager to explore new solutions and services. Don't miss this opportunity to showcase your brand and generate valuable leads in a vibrant and interactive environment!



2025 ANNUAL PARTNERSHIP BENEFITS AT-A-GLANCE

BENEFITS	VALUE	DIAMOND \$8,500	PLATINUM \$6,900	GOLD \$5,500	SILVER \$3,750
Website & Email Marketing					
DFW Newsletter Advertisements (published bi-monthly)	\$400 per ad	4	3	2	1
FPA DFW administered blast e-mail	\$500 each	4	4	3	2
Company logo displayed on FPA DFW website home page	\$600	✓	✓	✓	✓
Logo displayed in opening slides at all chapter meetings	\$400	✓	✓	✓	✓
Quarterly membership list in XLS format	\$1,500	✓	✓	✓	✓
Events & Speaking Opportunities					
Annual pass to most FPA DFW events	\$50-75 per event	2 per event	2 per event	1 per event	1 per event
Speaking engagement at 4th Annual FPA DFW Virtual CE Day	\$950	✓			
NEW! Exhibit table at any FPA DFW chapter meeting (up to 2x) <i>Must reserve in advance</i>	\$1,000	✓	✓		
NEW! One exclusive sponsor hosted webinar – promoted by FPA	\$1,200		✓		
10 Minute Sponsor Spotlight – Opportunity to Highlight Your Services	\$750	✓ <i>Conference</i>	✓ <i>Chapter Meeting</i>		
NEW! Happy Hour with the FPA DFW Board – Drinks are on us! Maximum 2 sponsor firms per happy hour	\$600	✓	✓		
Nomination for Annual FPA DFW Partner of the Year Award	\$1,000	✓	✓	✓	✓
FPA DFW Sponsor Appreciation Event Networking opportunity with FPA DFW Board & Leadership Alumni	Priceless	✓	✓	✓	✓
Annual Conference <i>(see page 5 for additional details)</i>					
Exhibit Table at the FPA DFW Conference + attendee list	\$2,250	2 Reps	2 Reps	1 Rep	1 Rep
Promotion of your company on all FPA DFW Conference marketing materials & table signage	\$750	✓	✓	✓	✓
Presenting keynote speaker at the FPA DFW Conference	\$2,000	✓			
NEW! Half page ad in printed FPA DFW Conference program	\$1,000	✓	✓		
10 Minute Sponsor Spotlight at the FPA DFW Conference	\$1,500	✓			

▶ **Diamond:** Keynote speaker at the annual FPA DFW Conference. Topics must be reviewed and approved by the FPA DFW Special Events Chair.

▶ **Platinum:** Platinum partner exclusive webinar, hosted by partner, promoted by FPA.



**FINANCIAL
PLANNING
ASSOCIATION**

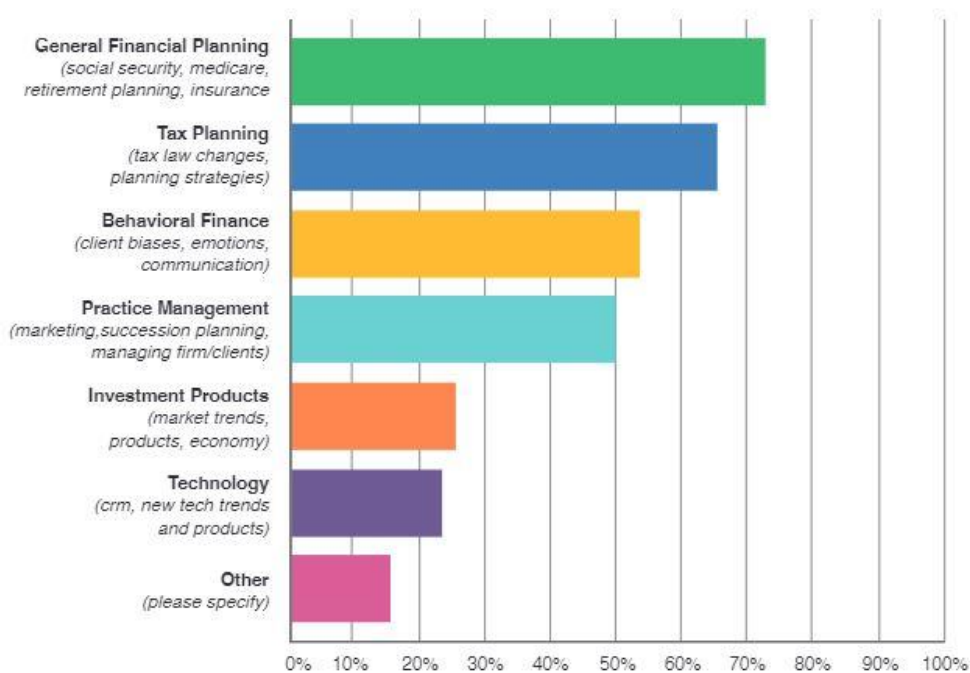
DALLAS
FORT WORTH

FPA DFW Annual Conference Benefits Overview

The Annual FPA Dallas/Fort Worth Conference will take place Thursday, February 13, 2025. This annual event is for partners that seek to connect with experienced planners who typically handle high-net worth clients. The FPA Dallas/Fort Worth Conference exhibition benefits are included for every sponsorship level.

2025 Benefits	Diamond	Platinum	Gold	Silver
Draped exhibit table – placement based on sponsorship level	✓	✓	✓	✓
FPA DFW Conference attendee list	✓	✓	✓	✓
Speaking engagement (Diamond: Keynote)	✓			
10-minute sponsor spotlight	✓			
Logo recognition on event website, signage, marketing materials, advertisements and programs	✓	✓	✓	✓
Registrations (additional discounted passes may be purchased)	3	2	1	1
Logo recognition on FPA Dallas/Fort Worth website & marketing materials	✓	✓	✓	✓
Sponsor recognition throughout the conference (program, signage, conference blast emails, and more)	✓	✓	✓	✓
Conference CE credits, swag, program and literature	✓	✓	✓	✓

Initial Member Survey Results on Topics





2025 Levels

Sponsorship Level	2025 Annual Dues
Diamond	\$8,500
Platinum	\$6,900
Gold	\$5,500
Silver	\$3,750

Ala Carte Opportunities

FPA DFW Ballpark Event – Opening Day \$7,000
FPA DFW Summer Ballpark Event \$3,500
FPA Women’s Group Social \$900
FPA Men’s Group Social \$900
NexGen Event \$1,000

Contact Us



Joel Berg, CFP®
FPA DFW
Partnerships Director



Melisa Hall
FPA DFW
Executive Director

We invite you to explore exciting partnership opportunities with the Financial Planning Association of Dallas/Fort Worth (FPA DFW). If you are interested in delving deeper into how we can collaborate, please reach out to Joel Berg, our Partnerships Director, at partnerships@fpadfw.org. He will be more than happy to discuss potential synergies and how we can work together for mutual benefit. Additionally, if you have any inquiries regarding the advantages of partnering with us or any general questions about our chapter, please don't hesitate to contact Melisa Hall, our Executive Director, at 972-747-0407 or via email at execdir@fpadfw.org. We look forward to connecting with you soon!

Corporate Partnerships are based on the 2025 calendar year. FPA DFW reserves the right to require all membership literature, correspondence and ad submissions to conform to our policies and format regulations and may require all sponsor speaker presentations be eligible for quality CE credit, as well as speaker outlines, bios and handouts be submitted by the requested due date to be eligible for a sponsor speaker presentation time for the chapter meetings, the annual FPA DFW Conference or other speaking events.



📞 (972) 747-0407

✉ execdir@fpadfw.org

🌐 www.fpadfw.org