

FPA Original Research

Shaping the Future of Financial Planning Together!

Partnering with the Financial Planning Association on original research is more than just gaining insights—it's about positioning your brand as a go-to thought leader and connecting with thousands of financial professionals who look to FPA for what's next in the profession.

What's in it for You?

- **Be the Authority:** Co-create the research focus to uncover insights that matter to your brand and the profession.
- **Get Noticed:** Boost your brand's visibility and get your name in front of the financial planning community.
- **Exclusive Insights:** Access valuable data to help you understand trends and spot market opportunities.

If you're ready to put your brand at the forefront of financial planning, let's make it happen together!

Annual Trends in Investing Survey | \$20,000

The Trends in Investing survey, led by the Journal of Financial Planning, is an annual research initiative uncovering advisers' insights on investment trends, strategies, and needs. By partnering with FPA, you'll access exclusive data and insights to fuel your strategies and engage your audience.

As a partner, you'll enjoy:

- **Brand Visibility:** Your brand is featured on all project materials and reports.
- **Public Relations:** Joint PR efforts through FPA channels.
- **Valuable Insights:** Access to exclusive FPA member data.
- **Content Recognition:** Acknowledgment in all research-related content.



Pulse Surveys | \$15,000

Curious about what's top of mind for FPA members? With this exclusive survey opportunity, you can pose targeted questions to our community of financial planners on topics that matter to you. We handle the logistics, from project management to question development, while you focus on what you want to learn.

Here's How It Works:

- **Brand Visibility:** Your brand included on all survey touch points, including email blasts and other marcom.
- **Direct Member Insights:** Receive raw data straight from the source, ready for you to analyze and leverage.
- **Limited Spots Available:** With high demand, this exclusive opportunity fills quickly—book early to secure your spot!

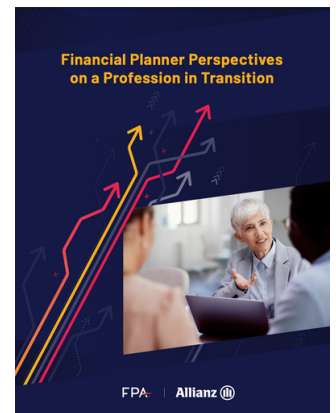
Signature FPA Research Partnership | \$50,000+

Imagine your brand leading a groundbreaking research project that dives deep into today's financial planning landscape, sharing those insights far and wide. Partnering with FPA on a custom research project means developing an impactful, high-visibility study with findings that resonate for up to a year, establishing your brand as a thought leader in financial planning.

Why This Partnership Stands Out:

- **Unmatched Brand Alignment:** See your brand prominently featured on all research materials, the FPA website, reports, and content, ensuring strong visibility across the profession.
- **Real-Time Engagement:** Present findings live at an FPA conference and lead a virtual webinar to connect directly with the FPA community.
- **Amplified Reach:** Your brand benefits from a comprehensive PR strategy shared through both FPA's and your own channels.
- **Insider Insights:** Tap into exclusive FPA member data to uncover insights that inform the profession—and your company's strategies.

With limited opportunities, this partnership is your chance to create a lasting industry impact. Let's bring your vision to life and lead the conversation in financial planning!



Let's Connect!

FPA is proud to be a partner in planning for our members, and we look forward to being your partner in helping drive awareness of your brand among the financial planning community.

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[Learn More!](#)