



**FINANCIAL
PLANNING
ASSOCIATION**

ILLINOIS

PARTNER PACKAGES 2025

CHAPTER CONTACT
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FINANCIAL PLANNING ASSOCIATION
OF ILLINOIS

[HTTPS://WWW.FPAILLINOIS.ORG](https://www.fpaillinois.org)

QUICK FACTS

FPA of Illinois has an average of over 650 financial professional members representing a broad spectrum of specialties including financial planning, broker dealer services, insurance/annuities, mutual funds, law, CPA's, banks/thrifts/trust, investment management, accounting, estate attorneys, and tax specialists.

- 52% of members are over 40
- 47% of members have ten+ years experience
- 69% of members are CFP®'s
- 78% of members are located in the Greater Chicagoland area.

ABOUT US

PARTNER BENEFITS

PERSONAL CONNECTIONS

FPA of Illinois is developing some exciting new avenues to keep our partners connected with our members. We held several in-person events in 2024 and are planning more in 2025 including 3 luncheons and more NexGen events. Of course, all of our level Partners get an exhibit table at our Conference for Advanced Planning.

RECOGNITION

You'll get visibility as an FPA of Illinois partner throughout the year at all chapter events, all communications, and on our website.

EXPOSURE

You are encouraged to attend all FPA of Illinois 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.

OPPORTUNITIES

You can meet and share your message with attendees at all chapter events. If you would like to host a social event, luncheon or something else, just let us know!

2025 EVENTS (Tentative)

Q1

- Lunch & Learn
- NexGen Social

Q2

- Lunch & Learn
- Mentee Mentor Kick-Off
- New Member Social
- Ethics Course
- ProBono Event

Q3

- Conference for Advanced Planning
- Post-Conference Social
- Give-Back Social
- NexGen Social

Q4

- Lunch & Learn
- Mentee Mentor Wrap-Up
- ProBono Event
- Year End Holiday Event





Partner Benefit Packages for 2025

	Value	Leading Partner \$6,500* SOLD OUT FOR 2025	Connecting Partner \$5,000* Limited to 8	Impact Partner \$3,500*	Luncheon / Social Event Sponsor \$2,000**	Virtual CE Event Sponsor \$750**
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FPA OF ILLINOIS CONFERENCE FOR ADVANCED PLANNING (CAP) – Fall 2025 Morningstar HQ, Date TBD***

Provide general session speaker for CAP 2025	\$5,000	√				
Exhibit table + pre/post event attendee list	\$2,500	√	√	√		
Complementary CAP registration for Partner representative(s). Note: Additional registration for Partner representatives can be purchased for cost of food & beverage.	\$400 EA	3 Total	2 Total	2 Total		
Complimentary CAP registration to be shared with advisor clients	\$400 EA	2 Total	2 Total	1 Total		
Promotion of company on all CAP marketing	\$1,000	√	√	√		
Board Member Ambassador assigned to help with personal introductions	PRICELESS					

PARTNER TO MEMBER CONTACT

Host Virtual Event - Educational Session or Practice Management (your content or outside presenter) and attendance list. (<i>Selection of CE Educational / Practice Mgt. Session opportunities are on a first-come, first-served basis</i>)	\$750	√	√			√
Exhibit space at all chapter in-person events (when space allows)	\$750 EA	√	√	√	√ At event	
List of all attendees at attended in-person events	\$500 EA	√	√	√	√ From event	√ From event
Complementary registrations to all chapter in-person events (one may be used for advisor client)	\$55 EA	4 Total	3 Total	2 Total	3 Total	
Quarterly membership list	\$2,000	√	√	√		
Named Sponsor for Luncheon or Social event	\$4,000				√	
Additional opportunities to host networking or social events (at your cost)	PRICELESS	√	√	√		

SOCIAL MEDIA / WEBSITE / VIRTUAL / EMAIL ADVERTISING

Recognition on FPA of Illinois social media channels (Twitter, LinkedIn, Facebook, Instagram)	\$500	√	√	√	√**	√**
Dedicated e-blasts to membership (Sent through FPA of Illinois email platform)	\$500	4	2	1		
Firm logo, contact email & link to company on Chapter website	\$600	√	√	√	√**	√**
Regular recognition as Corporate Partner in Chapter communications	\$2,000	√	√	√		

* 5% discount if paid by December 20, 2024

**In-Person Event and Virtual CE Event Partner will receive name and logo recognition while event is being marketed and post-event

***CAP Sponsorship opportunities will be available in Spring 2025