

FPA of San Francisco Strategic Partners Program

CONTACT INFORMATION

San Francisco Chapter Office | 9630 Bruceville Road, #106-149, Elk Grove, CA 95757

✉ info@fpasf.org 🌐 www.fpasf.org ☎ 877.260.3218



■ RECOGNITION

Gain visibility as an FPA of San Francisco Strategic Partner throughout the year through a variety of opportunities; monthly chapter meetings, our website, and electronic newsletters.

■ EXPOSURE

Be in front of our membership on a consistent basis. The financial professionals you'll meet through the FPA of San Francisco chapter can help you build long-term business relationships. FPA of San Francisco members are a highly targeted market for your product or service.

■ EXHIBIT TABLE

Members are continually looking for information on new products and services to meet their clients' needs. Display your materials at the chapter meetings to a targeted audience.

■ OPPORTUNITIES

You have the opportunity to meet and share your message with attendees at the chapter meetings and social gatherings. It's an excellent time to collect business cards for follow-up marketing.

Partnerships are available on a first-come, first-served basis. Limited availability.

CHAPTER MEETING FORMAT: 10 PER YEAR

Our chapter meetings create opportunities for partners and members to network regularly and build relationships. At each chapter meeting, we provide a 30-minute networking session prior to the start of the educational program.



ABOUT THE FPA OF SAN FRANCISCO

The FPA of San Francisco has more than 410 financial professional members, representing a broad spectrum of specialties including financial planning, broker dealer services, insurance and annuities, mutual funds, banks/ thrifts/trust, law, investment management, and accounting. The entire FPA membership totals nearly 28,000 and continues to grow.

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PLATINUM LEVEL STRATEGIC PARTNER (10 STRATEGIC PARTNERSHIPS AVAILABLE — BENEFITS ATTACHED)	\$3,000
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SILVER LEVEL STRATEGIC PARTNER (UNLIMITED — BENEFITS ATTACHED)	\$2,000
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PRO BONO EVENTS AND ACTIVITIES STRATEGIC PARTNER (LIMITED TO 4 STRATEGIC PARTNERS)	\$2,500
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Thanked in materials and meetings for all pro bono events.

MEMBER APPRECIATION EVENT STRATEGIC PARTNER (2 STRATEGIC PARTNERS)	\$2,000
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Name recognition at annual membership events.

STUDENT SCHOLARSHIP FUND STRATEGIC PARTNER (1 STRATEGIC PARTNER)	\$2,000
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Present the scholarship award at the program event where it's presented to winner.
Special branding at the scholarship presentation meeting.

BOARD APPRECIATION DINNER (1 STRATEGIC PARTNER)	\$1,250
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One invitation to the Board Appreciation Dinner.

SOCIAL GATHERING STRATEGIC PARTNER	\$1,000
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One invitation to a networking or social event.
Recognition as host for the networking or social event.

MEETING HOST STRATEGIC PARTNER	
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Your company provides meeting space that is a good fit for the event. This can be for Board Meetings, Member Meetings, Symposiums, and Strategic Planning Meetings.

FPA OF SAN FRANCISCO PARTNER	\$500
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Name listed on program materials and website.

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ANNUAL PLATINUM & SILVER STRATEGIC PARTNERSHIP PACKAGE BENEFITS



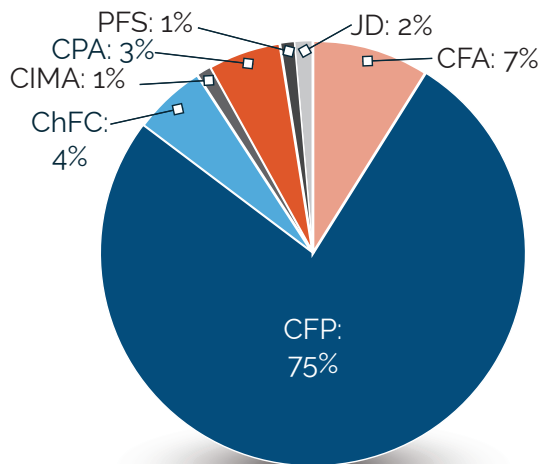
STRATEGIC PARTNER OPENINGS AVAILABLE		PLATINUM	SILVER
		10 SPACES	UNLIMITED
Strategic Partner Benefits			
Featured Strategic Partner at one chapter meeting, which includes:			
<ul style="list-style-type: none"> • Five minute presentation at meeting, power point optional • Educational webinar for the month you select (the meeting month and webinar should be in the same month selected by the Strategic Partner on a first-come, first-serve basis) • Logo and contact info on all programs and promotional material • Option to have handouts given to all attendees • Logo and contact info on "Walk-In Slideshow" while attendees are getting situated 		X	
• Logo and recognition extended to meeting partners such as CalCPA or CFA Society if the meeting is a joint meeting			
Significantly increase Platinum Strategic Partners' visibility by displaying the Platinum Strategic Partner of the Month's logo and rep's photo on the chapter's home page rotating photo carousel, and for all Platinum and Silver Strategic Partners, displaying the logos throughout the year on the rotating photo carousel on the official strategic partner page.		X	X
Strategic Partner Spotlight included in the chapter's monthly e-newsletter for your Strategic Partner month – to be determined		X	
Chapter Member Directory information in Excel, so you can easily import the information into your CRMs		X	X
Free admission for one Strategic Partner representative and two guests at all chapter meetings		X	
Free admission for one Strategic Partner representative and one guest at all chapter meetings			X
Stand up 30 second introduction and recognition at all Chapter Meetings that the Strategic Partner attends		X	
Stand up introduction to include name and company only			X
Improved technology so webcast attendees will hear you when you introduce yourself (after board introductions and before the speaker starts)		X	X
Run your logos on the main screen and in the webcast when you are introducing yourself		X	X
FPASF.org Website Listing (logo and contact info)		X	X
Include Strategic Partner Benefits under the Strategic Partner profile on the chapter's website, listing details about each Strategic Partners' products and services. To serve as a reference and reminder, we will also create a PDF of this information and email to our members at the beginning of the year.		X	X
Reach out to you to submit case studies that would showcase how your solutions help advisors bring value to clients by addressing their real-life needs. We will coordinate with you to include these case studies on the Strategic Partner's Circle webpage.		X	X
Invite members to write testimonials on how they worked with you and/or used your services and solutions to assist their clients. We will include these in your profiles and Strategic Partner promotional materials.		X	X
During the chapter president's conduct of each monthly meeting, remind members of your critical support and encourage them to make a concerted effort to respond to your outreach, as well as for them to visit the chapter's website and review your information, to become more intimately familiar with how your services can benefit their clients.		X	X
FPA of San Francisco email newsletter listing (twice a month - logo)		X	X
Strategic Partner Circle website page for posting of white papers and announcements for seminars and events		X	X
Recognition as a Strategic Partner on the table "tent cards" at all chapter meetings		X	X
25% discount on Regional Newsletter Advertising (rate sheet included)		X	X
Designated table for product literature or display at all chapter meetings		X	X
ANNUAL COST		\$3,000	\$2,000

All Strategic Partnerships are 12 months rolling. This is NEW to this Strategic Partnership package.

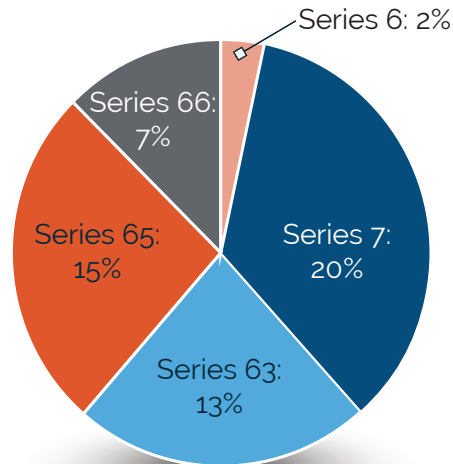
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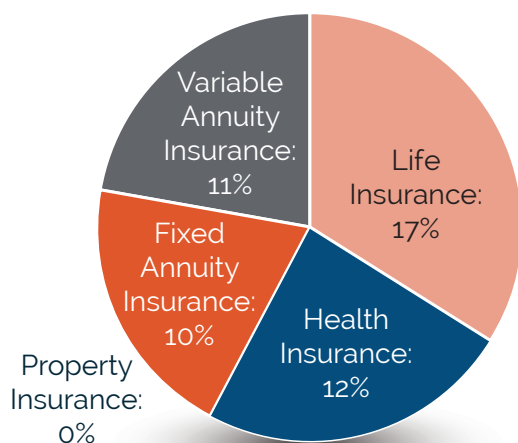
PROFESSIONAL DESIGNATION



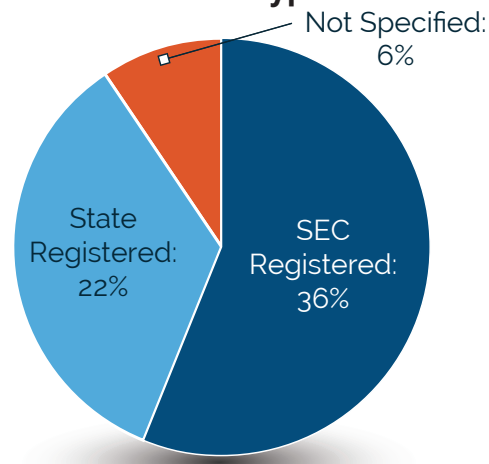
LICENSE TYPE



INSURANCE LICENSE



RIA/IAR Type



SOCIAL MEDIA STATS:

Twitter

839 Twitter followers

- a: 30+ scheduled tweets per year = 25,170 Impressions
- b: Live tweeting during meetings highlighting Strategic Partner of the Meeting and thanking all Strategic Partners, plus 1-3 additional tweets during meeting = 2,517 – 4,195 impressions
- c: Doesn't include ongoing retweets, likes, etc.

Facebook

152 Facebook likes

169 Facebook followers

10-12 posts per year = 1,700 – 2,000 impressions

LinkedIn

Main Group – 146 members

NexGen Group – 145 members

10-12 posts per year = 1,450 – 1,750 impressions per group, 2,900 – 3,500 total

Newsletters

- a: NorCal regional newsletter goes out 4x per year (Jan. 974, April 938, Sept. 979, Nov. 976) = 3,867 Impressions
- b: SF email newsletter goes out 2x per month to 510 members = 1020 Impressions

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STRATEGIC PARTNER RESERVATION FORM



Please complete the form below. Confirm your commitment by submitting payment. This form must accompany or precede payment. Please note that the FPA of San Francisco chapter does not formally endorse any Strategic Partner or related product(s) and all partnership requests are subject to Board discretion. The Board reserves the right to revoke Strategic Partnership at any time.

Company name _____

How would you like your company to be listed on marketing materials? Same as above OR fill in below.

Company Website address _____

Company Representative: _____

Local mailing address: _____

City _____ State _____ Zip _____

Phone number _____ Email address _____

Where would you like to receive your Regional Newsletter (The Planner)? Same as above OR fill in below.

Name: _____

Local mailing address: _____

City _____ State _____ Zip _____

Email address _____

Please tell us about your product, services and any special industry recognition (For the Strategic Partner Directory):

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Strategic Partner Level: ☐ Platinum \$3000 ☐ Silver \$2000

For Platinum Strategic Partners Only:

Please indicate your preferred month to be featured:

1st choice month _____ 2nd choice month _____ 3rd choice month _____

The meeting schedule is as follows:

January 9	August 13
February 13	September 10
March 12	October 8
April No Meeting	November 12
May 14	December 10 + Holiday Mixer
June 11	
July No Meeting	

The tax ID number for the Financial Planning Association of San Francisco is 58-1313679.

Please call us if you need us to fax a W9 form to you.

Payment Options (Check or Credit Card):

For mailing payments, please use the following address:

FPA of San Francisco
9630 Bruceville Road, #106-149
Elk Grove, CA 95757
Attn: Holly Wilkerson, Executive Director

A credit card form is below if you select this payment option

**Please be sure to email your company's logo as well as your professional headshot for Platinum Strategic Partners to info@fpasf.org*

For credit card payments, please provide the following information:

First Name/Last Name: _____

Billing Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Total Amount: _____ Credit Card Type: ☐ Visa ☐ MasterCard ☐ American Express ☐ Discover

CC #: _____ Exp. Date: _____ Security Code: _____

Signature: _____

Thank You for Partnering with the FPA of San Francisco!

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