



Minnesota Chapter  
3900 Main Street N.E.  
Minneapolis, MN 55421  
Office (763) 781-1212

[www.FPAMN.org](http://www.FPAMN.org)  
[www.FPAMNASCEND.org](http://www.FPAMNASCEND.org)

Thanks for communicating with us about partnering with the Financial Planning Association of Minnesota. We're excited to hear of your interest to work together in 2023!

We've included links below that provide information on our 2023 Partnership Packages.

-Partnerships: [Partner Resource Page](#)

-About Us and [Demographics](#)

-[2023 Partnership Packages](#): See the following four pages of information

The Benefits at a Glance explains the five different levels, their benefits, and the costs. The Diamond, Platinum, Gold, and Silver levels offer exhibition at our Annual ASCEND Conference. The Minneapolis Convention Center has been reserved for October 16-17<sup>th</sup>, 2023 for an in-person conference. If the landscape at that time does not allow for a safe in-person conference; a hybrid or virtual model will be adopted. The **FPA of Minnesota Symposium has been rebranded** to FPA of Minnesota ASCEND Conference. ASCEND uses NEW technology including a mobile app, ENGAGING Keynotes and all Exhibitor booths will be set-up in the MAIN STAGE ROOM where speaking programs are hosted!

The FPA of MN Chapter has approximately 750 members. Attendance at the ten-chapter meetings ranges between 150 - 300. In person chapter meetings are being hosted at the Metropolitan Ball Room – West End. Every fall, the Annual ASCEND conference (formerly Symposium) attracts state-wide attendees, consistently breaking attendance records. We anticipate over 650 registrants at this year's IN-PERSON event. We are excited to welcome everyone back to in-person meetings, conference, and networking socials in 2023!

Here are some other important statistics:

- Average member age = 49 years old
- 72% of members have ten plus years of professional experience
- 67% of members are CFP® professionals
- 54% hold their MN insurance license
- 71% have at least a Bachelor's

Top financial services provided:

- 77% Retirement planning
- 72% Financial planning
- 70% Investment/Asset management
- 69% Estate planning
- Other top-ranking areas include:  
Education & Comprehensive planning

The first step in securing your spot for 2023 is to fill out and return the Letter of Agreement; and then follow up with your payment. The form will tentatively hold your spot; please email completed form to [office@fpamn.org](mailto:office@fpamn.org).

If you have any other questions, feel free to communicate with any of the Partnership Directors or the FPA Executive Director:

**Keith Loveland JD, AIFA, CIDA**, Partnership Director  
952-746-1106 [kloveland@cap-mgt.com](mailto:kloveland@cap-mgt.com)

**Jessica Hawthorne**, Executive Director  
763-781-1212 [office@fpamn.org](mailto:office@fpamn.org)



The Annual Conference of FPA of Minnesota

## YOUR BENEFITS AT A GLANCE FOR YEAR 2023

| BENEFITS  |   | DIAMOND<br>\$8,500<br><i>1 Opportunity Available</i> | PLAT<br>\$6,000<br><i>9 Opportunities Available</i> | GOLD<br>\$4,500<br><i>Limited Availability</i> | SILVER<br>\$3,250<br><i>Limited Availability</i> | BRONZE<br>\$1,000<br><i>Introductory 1 Year Limit</i> |
|---|---|--|---|--|--|---|
| MARKETING BENEFITS  | Co-branding with the FPA of MN on title of golf event August 2023 at Bunker Hills Golf Club   | •  |   |  |  |   |
|   | 4 complimentary golf event passes (\$700 value)   | •  |   |  |  |   |
|   | Promotion on all golf event invites and promotions  | •  |   |  |  |   |
|   | Branding on all signage at the annual golf event  | •  |   |  |  |   |
|   | Annual golf event banquet sponsor with mic time   | •  |   |  |  |   |
|   | Input in annual charity selection and check presentation  | •  |   |  |  |   |
|   | Dedicated Partner Highlight in FPA <a href="#">Electronic Newsletter</a>  | •  | •   |  |  |   |
|   | In Person: 1 special <a href="#">ASCEND Conference</a> sponsorship included (ex: Breakfast, Dessert, Reception)   | •  | •   |  |  |   |
|   | Virtual: Dedicated push notification to <a href="#">ASCEND Conference</a> attendees & Featured partner on home page in app  |  |   |  |  |   |
|   | FPA administered social media post<br><i>*Social media post to be partner composed. This is a great way of promoting your events, Send messaging and share on goings within your company with members and FPA MN followers!</i>         | •  | •   | •  |  |   |
|   | Firm's logo on <a href="#">FPA website</a> with a direct link to website  | •  | •   | •  |  |   |
|   | Full page electronic ad in FPA Member Directory   | •  | •   | •  |  |   |
|   | Electronic spreadsheet of membership (up to 4 mailings)   | •  | •   | •  |  |   |
|   | Golf/Bocce Tournament - special signage at a hole August 2023   | •  | •   | •  |  |   |
|   | In-Person: Minute to Shine at the <a href="#">Annual ASCEND Conference</a><br>Exhibitor Door Prize Give-Away - 16 available<br>Virtual: Sponsor name on room at <a href="#">ASCEND Conference</a> for one day of the virtual conference | •  | •   | •  |  |   |
|   | Add up to 3 links & Partner Video link in <a href="#">Partner Resource Library</a>  | •  | •   | •  | •  |   |
| Attendee list from <a href="#">ASCEND Conference</a> - one pre- and one post-mailing Oct 16-17, 2023 at the Minneapolis Convention Center     | •   | •  | •   | •  | •  |   |
| Recognition on all FPA promotions including ASCEND Conference mailer, online portal, website, newsletters, signage, and advertising materials | •   | •  | •   | •  | •  |   |
| Monthly <a href="#">Electronic Newsletter</a> /Quarterly Partner Calls  | •   | •  | •   | •  | •  |   |
| NETWORKING BENEFITS   | Host a <a href="#">chapter meeting</a> which includes a 10-minute partner presentation, dedicated feature article in newsletter, social media post and receive the attendee list  | •  | •   |  |  |   |
|   | Option to keep the same booth space at ASCEND Conference. <i>Floor plan choice opens by partnership level and subject to change, approved by Minneapolis Convention Center</i>  | •  | •   |  |  |   |
|   | One Rep at Platinum Informational table & company brochure at monthly <a href="#">chapter meetings</a>  | •  | •   |  |  |   |
|   | 10-minute presentation to the FPA board of directors  | •  | •   |  |  |   |
|   | One Rep at shared partner table at a <a href="#">chapter meeting</a>  | •  | •   | •  |  |   |
|   | Exclusive attendance at all NexGen and K'Nex Events (in-person & virtual)   | •  | •   | •  |  |   |
|   | Exclusive attendance at First Year Member Socials   | •  | •   | •  |  |   |
|   | Exhibit space at the <a href="#">Annual ASCEND Conference</a> , Oct 16-17, 2023 at the Minneapolis Convention Center  | •  | •   | •  | •  |   |
|   | Two Reps at the <a href="#">Annual ASCEND Conference</a> , Oct 16-17, 2023 at the Minneapolis Convention Center   | •  | •   | •  | •  | Limit 2 - \$350ea                                     |
|   | One Annual Pass to all ten <a href="#">monthly chapter meetings</a>   | •  | •   | •  | •  | •   |
| One Golf/Bocce Ball Outing participant & signage in clubhouse in August 2023  | •   | •  | •   | •  | •  |   |
| Prompt payment discounts, with payment Received by January 31, 2023   |   | 5% Off   | 5% Off  | 5% Off   | 5% Off   |   |

# LETTER OF AGREEMENT FOR YEAR 2023

The undersigned hereby applies to become a Partner of the Financial Planning Association of Minnesota chapter (FPA of MN) for the 2023 sponsorship year. If Partner is accepted, by signing below, Partner understands that this agreement serves for the term of January 1st through December 31st, payable in advance.

The FPA of MN strives to develop quality partnership relationships with sponsors who have a long-term interest in supporting the financial planning industry. Partner understands that FPA of MN has the ultimate right to refuse acceptance to any party without recourse in its pursuit of that goal. All benefits are offered with the understanding that the Partner assumes the responsibility to use benefits within the calendar year.

## RESPONSIBILITIES OF PARTNERS

Responsibilities of Partners will include:

- Prompt payment of annual partnership fee. Refer to Benefits at a Glance sheet for Prompt Payment Discount.
- Active participation in the education of our membership on your company's products and services.
- Assume the responsibility to take advantage of benefits to be used within calendar year.
- Only Diamond and Platinum Partners have permission to mail correspondence to FPA membership. Request data two weeks prior to mailing date.

FPA of Minnesota may:

- At its sole discretion, accept, deny, non-renew, and/or terminate Partner. No refunds or carry-overs are given.
- Schedule, reschedule, or cancel, at its discretion, meeting dates or presentations and will not be responsible for any Partner liabilities, financial or otherwise, arising from such actions.
- Increase attendance by inviting a non-profit association, their members and their sponsor to partake in a chapter meeting. The non-profit and sponsor will be in agreement that their promotions and materials will not be in direct competition with our Diamond or Platinum Host partner offerings. Request *Joint Meeting Policy with other Non-Profit Associations* for details.

Partner agrees to the above terms, and hereby applies for a partnership with the FPA of MN:

Entered into this \_\_\_\_\_ day of \_\_\_\_\_, 202\_\_.

Signed by:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Company Name - as you want it listed on the website and in newsletters

The dedicated partner representative is: \_\_\_\_\_

Email Address \_\_\_\_\_ Website \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip code \_\_\_\_\_

\_\_\_\_\_  
Toll Free Number

\_\_\_\_\_  
Phone

# BENEFIT SELECTION SHEET

## Golf & Bocce Ball Outing Upgrades:

- Diamond & Platinum Only:  
Out at Tee Opportunity (Free)
- Gold & Silver: Out at Tee Opportunity - \$250
- Winning Golf Teams Sponsor - \$500
- Bocce Ball Tourney & Golf Clinic - \$500
- Putting Contest - \$500
- Straightest Drive Men & Women- \$250
- Closest to Hole Men & Women - \$250
- Longest Putt Men & Women - \$250
- Hole in One Grand Prize \$10K Cash/Car - \$500
- Hole in One 1<sup>st</sup>, 2<sup>nd</sup> or 3<sup>rd</sup> Place Prize - \$250 each
- Lunch Sponsor - \$300
- Driving Range - \$250
- Partee Cart - \$250 (2 available)
- Beverage Cart - \$500 (2 available)
- GPS Cart Ad - \$100 (18 if available)
- Raffle Prizes (\$50 Value)
- Cloth Bags for Give-Away Donations
- Goody Bag Donations/Trinkets

## Annual ASCEND Conference Upgrades:

- Wi-Fi Sponsor - \$850 per day
- Charging Station Sponsor - \$500 per day
- Beverage Sponsor - \$300 per day
- Breakfast Sponsor - \$300 per day
- Dessert Sponsor - \$300 per day

## NexGen and K'Nex Event Upgrades:

- Sponsor NexGen Social - \$200
- Sponsor NexGen ASCEND Conference Social - \$275
- Sponsor K'nex Event – Educational event - \$500

[Click for more NexGen Sponsorship Information](#)

## DIAMOND & PLATINUM LEVEL:

Top 2 monthly chapter meeting host partner choice:

1. \_\_\_\_\_
2. \_\_\_\_\_

*PR benefit will be linked to Host Partner Month*

## DIAMOND & PLATINUM LEVEL:

Top 2 monthly meeting choices for hosting platinum information table:

1. \_\_\_\_\_
2. \_\_\_\_\_

*Submit one inch (up to 50) of company brochures for display at the chapter meetings.*

## DIAMOND, PLATINUM & GOLD LEVEL:

Top 2 monthly meeting choices for shared partner table:

1. \_\_\_\_\_
2. \_\_\_\_\_

## TO-DO's for DIAMOND, PLATS & GOLDS:

- Email Social Media Handles for FPA PR
- Email Social Media Post for FPA distribution
- Email PDF for online Member Directory
- Request database for up to 4 mailings

## TO-DO's for ALL PARTNERS:

- Email logo for website and online promotion
- Email website, video and/or resource links to load to [Partner Resource Library](#)

## Special Note:

*The FPA of Minnesota may have some special opportunities throughout the year for sponsorships that would provide you with additional exposure. As those become available, we will reach out to you by email – with absolutely no obligation on your part. **We are very appreciative of all that you do for us.***

**Diamond, Platinum, Gold and Silver Sponsors:  
Submit payment by January 31<sup>st</sup> to qualify for the 5% Prompt Payment Discount**

## Sign Me Up for 2023 Partnership

- Diamond Partner - \$8,500 (limit 2 years)
- Platinum Partner - \$6,000
- Gold Partner - \$4,500
- Silver Partner - \$3,250
- Bronze Partner - \$1,000 (limit 1 year)

Credit/Discount ..... \$ \_\_\_\_\_

Total Due ..... \$ \_\_\_\_\_

## Payment Options:

Visa, MasterCard or American Express accepted.

- I wish to use 2021 budget monies.
- I wish to use 2023 budget monies.
- I plan to send a check; invoice us.
- [Pay online](#)

Return to the **FPA of Minnesota** by  
Mail: 18713 Providence Dr. Big Lake, MN 55309  
Email: [office@fpamn.org](mailto:office@fpamn.org)  
Phone: 763-781-1212