



FINANCIAL
PLANNING
ASSOCIATION

MINNESOTA

A photograph of the Minneapolis skyline at night, featuring several illuminated skyscrapers and a highway interchange in the foreground with light trails from traffic. The image is partially obscured by a dark blue diagonal overlay on the right side.

2024 Partnerships Packages

Your Partner in Planning™

OVERVIEW OF THE YEAR

JAN

Chapter Meeting

- » Educational Meeting with Headliner Speakers
- » In-person format
- » Varied locations
- » Plan to also Zoom

FEB

Partner Session

- » Educational Meeting with Partner-hosted Speakers
- » Hosted online
- » Could be hosted in-person as a Lunch n' Learn

MAR

Networking

- » Networking sessions for members and partners
- » Some hosted and inexpensive
- » Varied locations
- » Others with fun experiences

APR

CE-Day Session

- » Half-day Educational event hosted in Spring
- » Complement ASCEND
- » Minimal cost to attendees
- » Partner-hosted sessions
- » Possible Keynote

MAY

Partner Session

- » Educational Meeting with Partner-hosted Speakers
- » Hosted online
- » Could be hosted in-person as a Lunch n' Learn

JUN

Networking

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JUL

Chapter Meeting

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AUG

Golf Event

- » Participation and promotion at Golf Event
- » Hole Representation
- » Pin Prizes
- » Experience Sponsorships

SEP

Partner Session

- » Educational Meeting with Partner-hosted Speakers
- » Hosted online
- » Could be hosted in-person as a Lunch n' Learn

OCT

ASCEND

- » Participation and promotion at Ascend
- » Exhibitor Opportunities
- » Sponsorship and Add-Ons Available

NOV

Chapter Meeting

- » Educational Meeting with Headliner Speakers
- » In-person format
- » Varied locations
- » Plan to also Zoom

The Financial Planning Association of Minnesota is a robust chapter with approximately 650 members. We have several events throughout the year supporting the FPA value proposition of P – L – A – N: Practice Support, Learning, Advocacy and Networking.

Our partners are key in helping to offer engaging content and opportunities to bring together our community. In 2024 we are introducing some changes to the frequency and type of events while keeping the successful framework of our chapter.

- » Two-thirds of members are CFP® Professionals
- » Half hold their MN insurance license

CONTACT INFORMATION

Ky Carlson

FPA-MN Sales Coordinator
partnerships@fpamn.org
651-288-3727



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CHAPTER PARTNERSHIP OPPORTUNITIES

Chapter Partner : \$2,000

- » Attendance at all chapter events, including chapter meetings, CE-Day Session and Golf
 - ◇ Special area at CE-Day for attendee engagement
 - ◇ Dedicated feature article in newsletter
 - ◇ Discount for at-the-tee sponsorship for Golf event.
 - ◇ Discount for ASCEND Exhibitor
- » Access to member directory
- » Name, Logo and Link on FPA MN Website

Chapter Meeting Host : \$3,250 (3 available)

- » Host an in-person chapter meeting which includes:
 - ◇ 10-minute partner presentation
- » Dedicated Partner Highlight in FPA Electronic Newsletter
- » Exhibiting table at the meeting for materials and conversations
- » Company representative may give a 1-minute introduction to your company on the main stage at ASCEND ahead of a keynote speaker (if exhibiting at conference)

Partner Session Host: \$2,500 (3 available)

- » Educational Meeting with Partner-hosted Speakers
 - ◇ Session needs to be approved by FPA MN Programs committee and should be CFP® CE approved, payment required after approval.
- » Hosted online via Zoom (Lunch n' Learn option available at partners' cost)
 - ◇ 10-minute partner presentation

Presenting Sponsor at CE Day: \$2,500 (3 available)

- » Educational Meeting in-person with Partner-hosted Speakers part of a half-day event
 - ◇ Session needs to be approved by FPA MN Programs committee and should be CFP® CE approved, payment required after approval
 - ◇ 5-minute partner presentation

Networking Event Host: \$2,500 (2 available)

- » Host of experience-based networking event (option to influence event location/elements)
 - ◇ Opportunity to address the attendees
 - ◇ Signage at the event

Diversity, Equity & Inclusion Happy Hour Sponsor: \$1,000 (2 available)

- » Sponsor an event that the DE&I committee hosts

NexGen Summit Sponsor: \$1,000 (1 available)

- » Sponsor an event that the NexGen group hosts

All event hosts will receive a dedicated social media post and meeting attendee list.

PARTNERSHIP OPPORTUNITIES

October 22 & 23, 2024 | Minneapolis Convention Center

ASCEND Exhibitor : \$3,000 / \$1,450 for Chapter Partners

- » Includes attendance for 2 to the conference, networking opportunities
- » Booth in the partner area

ASCEND Event Sponsor – Main Stage Introduction : \$6,500 (2 available)

- » Introduction of Keynote Address
- » Company representative may give up to 5 minutes introduction to your company
- » Promotional banner displayed prominently at the session (company provided)
- » Place promotional literature (one 8.5x11 or smaller) on each table (company provided)
- » Includes ASCEND Exhibitor benefit

Mobile App Sponsor: \$1,500 (1 available)

- » Recognition on the splash screen and mobile app webpage
- » One banner ad in the conference mobile app, including links to your company website

Minute to Shine – Main Stage : \$1,000 (7 available)

- » Company representative may give a 1-minute introduction to your company on the main stage ahead of a keynote speaker
- » Draw for a prize provided by your company

Minute to Shine – Breakout Session : \$500 (12 available)

- » Company representative may give a 1-minute introduction to your company in a breakout session of your choice.

Breakfast Sponsor: \$750 (2 Available)

- » Company logo on signage throughout breakfast

Lunch Sponsor: \$750 (2 Available)

- » Company logo on signage throughout lunch

Break Sponsor: \$500 (2 Available)

- » Company logo on signage throughout breaks
- » Recognition as a conference sponsor on the FPA-MN website, mobile app, conference signage, and in the on-site program

Charging Station Sponsor: \$500/day (2 Available)

- » Company logo on signage at all charging stations

Wifi Sponsor: \$500 (2 Available)

- » Customized WiFi information

Coffee Sponsor: \$300 (2 Available)

- » Company logo on signage at all coffee stations
- » Opportunity to provide logoed napkins and/or cups

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All ASCEND Partners will receive recognition as a conference sponsor on the FPA-MN website, mobile app, conference signage, and in the on-site program. Conference sponsors will also receive an event attendees list.

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GOLF EVENT OPPORTUNITIES

Golf Reception Sponsor : \$1,000 *(1 available)*

- » Opportunity to sponsor a happy hour/reception/dinner/etc., after golf concludes.

Tee Sponsor : \$750 / \$250 for Chapter Partner *(18 available)*

- » Set up your presence on a tee box to meet & greet golfers as they make their way through the course. You determine how you want to entertain golfers – treats, refreshments, games, etc. Please note that all food and beverage needs to be pre-ordered through golf club. Includes one representative lunch.

Putting Green Sponsor : \$500 *(1 available)*

- » Signage on the putting green.

Beverage Sponsor : \$500 *(2 available)*

- » Beverage Sponsor has the choice between providing 1) one drink ticket via the beverage cart or 2) a beverage station (ex: Bloody Mary Bar or Mimosa Bar) for golfers on the course. Sponsor will receive recognition on the Beverage cart or at the beverage station as well as on the webpage.

Lunch Sponsor : \$300 *(1 available)*

- » Signage at the lunch tables and on lunch tickets

Driving Range Sponsor: \$250 *(1 available)*

- » Signage on the driving range.

Pin Prize Sponsorships: \$250 *(6 available)*

- » 2 Straightest Drive (men and women)
- » 2 Longest Drive (men and women)
- » 2 Closest to the Pins (men and women)



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Organization Information

Organization _____
Name of Contact Person _____ Title _____
Address _____
City _____ State _____ Zip _____
Phone _____ Fax _____
Email _____ Website _____
All listings and signage should read _____

Partnership Opportunities

CHAPTER PARTNERSHIPS

Chapter Partner: \$2,000
Chapter Meeting Host: \$3,250
Partner Session Host: \$2,500
Presenting Sponsor at CE Day: \$2,500
Networking Event Host: \$2,500
DEI Happy Hour Sponsor: \$1,000
NexGen Summit Sponsor: \$1,000

GOLF TOURNAMENT

Golf Reception Sponsor: \$1,000
Tee Sponsor: \$750 / \$250 Chapter Partner
Putting Green Sponsor: \$500
Beverage Sponsor: \$500
Lunch Sponsor: \$300
Driving Range Sponsor: \$250
Pin Prize Sponsor: \$250

Straightest Drive Men Women Longest Drive Men Women Closest to the Pins Men Women

ASCEND PARTNERSHIPS

Exhibitor: \$3,000 / \$1,450 for Chapter Partners
Event Sponsor – Main Stage Introduction: \$6,500
Minute to Shine – Main Stage: \$1,000
Minute to Shine – Breakout Session: \$500
Breakfast Sponsor: \$750
Lunch Sponsor: \$750
Break Sponsor: \$500
Charging Station Sponsor: \$500
Wifi Sponsor: \$500
Coffee Sponsor: \$300

Payment Information

All exhibits and sponsorships are available on a first-come, first-served basis. Exhibits and sponsorships are required to be paid prior to the start of an event. If paying by credit card, all fields are required.

GRAND TOTAL: \$ _____ Check (payable to FPA of MN) Visa Mastercard American Express Discover
Name (as it appears on card) _____
Card Number _____ Exp. Date _____ Sec. Code _____
Email _____ Phone _____
Authorized Signature _____
Address (if different than above) _____
City _____ State _____ Zip _____

Mail/Fax with payment to:

1601 Utica Ave S, Suite 213, Minneapolis, MN 55416-3400

Fax: 651-290-2266

Questions? Contact Ky Carlson at partnerships@fpamn.org or 651-288-3727.