

YOUR 2024 PARTNERSHIP OPPORTUNITIES



FINANCIAL
PLANNING
ASSOCIATION

CHARLOTTE



We are thrilled about your interest in helping us deliver a first-class member experience. A partnership with you will provide us with a wealth of opportunities including the ability to bring in nationally recognized speakers. What this means for you as a partner of FPA CLT is that you will enjoy a vast exposure to more financial planning professionals. Our mission is to serve our members by providing educational, networking and mentoring opportunities, representing their professional interests to the government, and promoting the value of financial planning to the public. We strive to offer superior resources and opportunities to our members, and partnerships are critical to the ongoing success of our organization and mission. By partnering with the FPA CLT, you will have direct access to financial services professionals in the Charlotte Metro area and the Southwestern areas of North Carolina. Our members include financial planners, brokers, insurance professionals, attorneys, CPAs, trust specialists, banking professionals and more – all dedicated to providing the most valuable products, services and advice to the clients they serve.

Recognition as a chapter partner will allow you to sponsor our organization and reinforces your commitment to the success and growth of our membership, as well as the financial planning profession. In addition to receiving recognition at our chapter meetings and events, you will have the opportunity to make connections, build relationships, engage in conversation, and exchange knowledge with key decision makers in the financial planning industry in the Greater Charlotte area.

Should you have questions, please contact:

Jon Shumate, CFP
2023 FPA of Charlotte President
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Ready to sign up?

Visit www.fpacharlotte.org/fpa-charlotte-partnerships

2024 CALENDAR OF EVENTS

Schedule subject to change without notice

JANUARY

16 | Lunch & Learn

FEBRUARY

22 | NexGen Event

MARCH

19 | Lunch & Learn

APRIL

Teacher Pro Bono Project
9 | Webinar
17 | Wednesday Wine Down

MAY

9 | Chapter BBQ
21 | Ethics

JUNE

No events

JULY

No events

AUGUST

Classroom Central Supply Drive
20 | Lunch & Learn

SEPTEMBER

17 | Lunch & Learn
19 | NexGen Event

OCTOBER

21 | Symposium Sponsor Reception
22 | Symposium

NOVEMBER

Teacher Pro Bono Project

DECEMBER

10 | Lunch & Learn

Partner Options

Diamond Sponsor

Investment: \$5,000

Limited to two

- 12 months of promotion on chapter website
- 2 ads or articles in chapter newsletter
- 4 email blasts to the membership sent by FPA of Charlotte
- Complimentary access to all Chapter Events for 2 people
- Quarterly membership list and demographic report
- Promotion of any CE conference that your company is offering
- Opportunity to host two webinars promoted and managed by FPA of Charlotte
- Exhibit table at the annual symposium in prominent location
- Opportunity to submit speaker/topic proposal for symposium session*
- Opportunity to address attendees during a symposium session (3 minutes)
- 2 complimentary registrations for the Symposium to share with clients

Platinum Sponsor

Investment: \$3,000

Limited to four

- 12 months of promotion on chapter website
- 1 ad or article in chapter newsletter
- 2 email blasts to the membership sent by FPA of Charlotte
- Complimentary access to Chapter Events for 1 person (Limit of 4 - member rate will apply thereafter)
- Quarterly membership list and demographic report
- Promotion of any CE conference that your company is offering
- Opportunity to host two webinars promoted and managed by FPA of Charlotte
- Exhibit table at the annual symposium in preferred location (limit of 2 staff members)
- Opportunity to submit speaker/topic proposal for symposium session*
- Opportunity to address attendees during a symposium session (2 minutes)
- 1 complimentary registration for the Symposium to share with clients

*Submissions must be reviewed and approved by the Program Committee

Partner Options

Gold Sponsor

Investment: \$2,000

Unlimited

- 12 months of promotion on chapter website
- 1 ad or article in chapter newsletter
- 1 email blasts to the membership sent by FPA of Charlotte
- Complimentary access to Lunch & Learns for 1 person (Limit of 2 - member rate will apply thereafter)
- Annual membership list and demographic report
- Promotion of any CE conference that your company is offering
- Exhibit table at the annual symposium (limited to 2 staff members)

Silver Sponsor

Investment: \$1,000

Unlimited

- 12 months of promotion on chapter website
- 1 email blast to the membership sent by FPA of Charlotte
- Member rate for all Chapter Events
- Exhibit table at the annual symposium (limited to 2 staff members)

Special Event Opportunities

These are in addition to the sponsor level you choose.

Sponsors can opt to host a special event for FPA of Charlotte members at their own cost.

- FPA of Charlotte will assist with coordination of the event, promote the event to its members and manage registration.
- The Sponsor will staff the event and cover all costs associated with the event.
- Examples:
 - Pickleball
 - March Madness
 - Axe Throwing
 - **Or bring your own idea!**



CHAPTER AT-A-GLANCE

Number of Members: 339

CHAPTER DEMOGRAPHICS

77%

cfp professionals

59%

state registered rias

42%

sec registered rias

31%

life insurance license

30%

series 7

25%

health insurance license

20%

variable annuity license

TYPES OF PRACTITIONERS

- Accountant
- Attorney
- Banking Professional
- Broker-Stockbroker Registered Rep
- Financial Planner
- Insurance Professional
- Investment Manager
- Retirement Planning Professional

WHAT TO EXPECT IN 2024

Education

There are multiple opportunities for our members to earn continuing education credits throughout the year. In 2024 the chapter will continue to offer in-person events allowing partners more opportunities to network with the members.

Socials

Social networking events are being planned to bring together members and partners in a casual and fun atmosphere.

Symposium

The largest event for the chapter is the Annual Symposium and Sponsor Expo which is held in the fall each year. Partners are provided an exhibit table for the event and several opportunities throughout the day to network.

NexGen

Get to know the next generation of advisors through the Chapter's NexGen efforts

Pro Bono & Community Outreach

Partners are included in all pro bono opportunities that bring together members to help in the local community.

