



FINANCIAL
PLANNING
ASSOCIATION

SOUTH FLORIDA

2025 PARTNERSHIP & SPONSORSHIP OPPORTUNITIES

The Financial Planning Association of South Florida members are supported by a number of exceptional partners and sponsors who help offset the cost of delivering benefits. Choosing to support the FPA of South Florida and our mission to elevate the financial planning profession and the value we provide our members and the broader community, highlights your commitment to financial advisers, financial planning, and the financial services profession.

FPA of South Florida partners and sponsors enjoy year-long exposure to financial planners and professionals seeking business resources and solutions and networking opportunities to expand their outreach.

ABOUT US

FPA of South Florida is a recognized professional membership resource and advocates for the CFP community, serving Palm Beach and Broward counties. Our mission is to advance the field of financial planning by fostering education, promoting best practices, and advocating for the benefits of financial planning to the community.

MEMBERSHIP PROFILE

Membership Count:

Current Members – 164

89.96%

Retention rate

70%

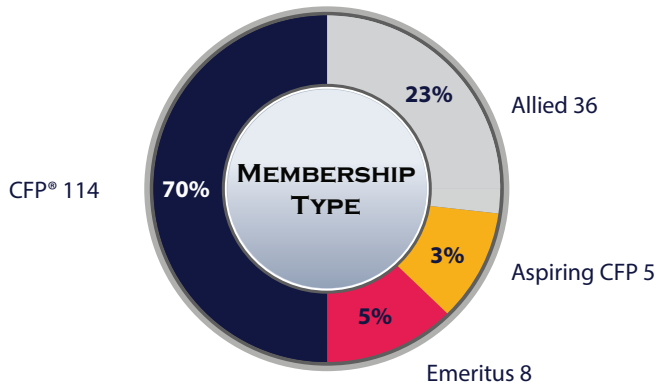
Total CFP®s 114

85%

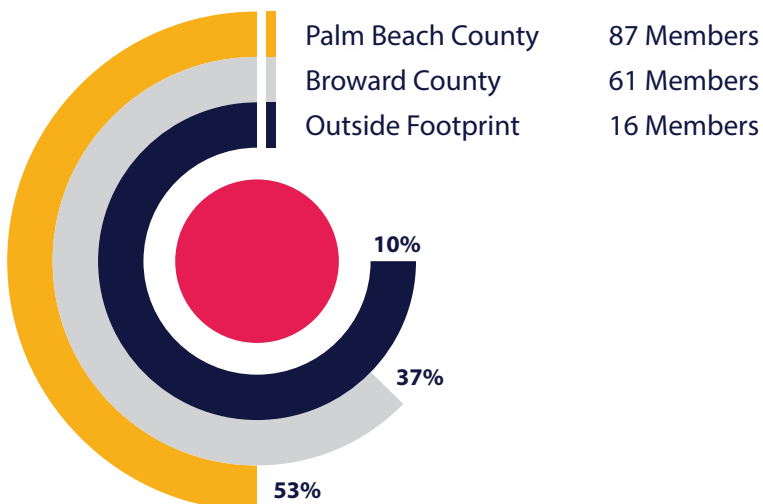
FPA national avg

30%

Advanced Degrees & Certifications 49



Membership Geographic Footprint



ANNUAL PARTNERSHIP OPPORTUNITIES

Signature Partner \$1000

Signature Benefits:

- Event speaking opportunity or provide a guest speaker (board approval required).
- Display of marketing collateral at speaking event or meeting.
- Firm's logo on FPA SFL website sponsor page with direct link for one year.
- Company logo and acknowledgement in FPA SFL membership email distribution.
- One annual pass to all FPA SFL meetings/socials/events with complimentary attendance for one company representative (additional representatives at reduced member rate).
- Verbal recognition and thanks at all FPA SFL meetings and events.
- Company logo and link on "Thank You for Attending" emails to attendees.
- 10% discount for all renewing partners.

Signature PLUS Partner \$1500

Signature PLUS Benefits:

Includes all Signature benefits (listed above), PLUS...

- Company logo and direct link on the FPA SFL website home page for one year.
- Opportunity to facilitate and/or co-host one practice management breakfast OR one roundtable working session open to both members and non-members.
- Company logo and link included in social media "Thank You & Recognition" quarterly campaign.
- Opt-in attendees contact list from all events.

SPONSORSHIP OPPORTUNITIES

Meeting-level Sponsorship \$500

- Announcement of sponsorship in meeting notifications and on FPA SFL website meeting page.
- Company logo and link on all sponsored event member email communications.
- Company name and link included in meeting social media posts.
- Ten-minute speaking introduction.
- Complimentary attendance for one company representative.
- Company logo on meeting program or agenda (if applicable).
- Company logo and link on Thank You email to attendees.

Student Sponsor & Scholarship

CFP Exam Student Scholarship \$300

Help us engage in the future of our industry by contributing to the CFP Exam Scholarship fund. (Funds distributed to FAU scholarship recipients twice a year and in advance of exam dates).

FAU Student Sponsor \$25/per student

This contribution covers the cost of attendance at one FPA SFL meeting/event for one FAU College of Business student.

PARTNERSHIP | SPONSORSHIP COMMITMENT FORM

Partnership | Sponsorship Level:

Name:

Company:

Address:

City:

State:

Zip:

Phone:

Email:

Signature:

Make checks payable to: Financial Planning Association of South Florida, P.O. Box 31591, Palm Beach Gardens, FL 33420

Credit Cards accepted.

Online payments available through website: https://southfloridafpa.org/Sponsorship_Benefits

Card Type:

Card #:

Cardholder Name:

Exp. Date:

CVC#:

City, State, Zip:

Billing Address:

Phone:

*Signature:

*Authorizing FPA SFL to charge your credit card.

Discover more at www.fpasouthflorida.org