



**FINANCIAL
PLANNING
ASSOCIATION**

TAMPA BAY

Sponsorship Opportunities

Passion led us here. FPA of Tampa Bay is where financial planning professionals come together.



Our members champion the value of financial planning

The more we grow as practitioners and planners, the better we serve our clients and our community. We are dedicated to elevating each other and the financial planning profession throughout the Greater Tampa Bay Area.

Grow Awareness

Let FPA of Tampa Bay be your gateway and connection to financial planning professionals in the Greater Tampa Bay Area. Our reach goes beyond our chapter membership and extends to 5,000+ financial planning and investment professionals in our five-county area.

Visibility and Personal Connections

Visibility and being top of mind is important to you. Partner throughout the year at chapter events, select chapter communications, and on our website.

FPA of Tampa Bay is developing some exciting new avenues to keep our partners connected with our members, both in-person and personalized virtual events. As soon as conditions safely allow, we will begin integrating in-person meetings with our virtual events.

Exposure. FPA of Tampa Bay Member Vault

You are encouraged to attend all FPA of Tampa Bay events but continuous exposure is yours through our **FPA of Tampa Bay Member Vault**. Members will have access to your information 24/7 as they seek information on new products and services to meet their clients' needs. The financial planning professionals you will meet through FPA can help you build long-term business relationships.

Opportunities to Share Specific Messages

Meet and share your message with event attendees. It's an excellent to collect contacts for follow-up marketing and potential future business.

Demonstrate Your Corporate Values and Commitment

Being a sponsor of FPA of Tampa Bay signals to all financial advisors that you are committed to your relationship with the financial planning profession.

FPA of Tampa Bay members and the professionals we reach through our events and communications are diverse. They represent the broad spectrum of specialties including financial planning, broker dealer services, insurance/ annuities, mutual funds, banks/thrifts/trust, law, CPAs, investment management, accounting, and tax specialists.

Our Members Are Experienced Professionals

69% have 20+ years of experience
69% are over age 45

Professional Designations

33% of our members hold multiple professional designations
71% CFP® Professionals
8% ChFC®
7% CLU® **7%** CPA
3% CRPC® **3%** CFA **3%** CIMA®

Securities Registration









46% Dually Registered | Hybrid
4% Broker Only **16%** IA Only
33% Not Registered

Top Firms for Securities Registration





Ameriprise Financial, LPL Financial, Raymond James, J.W. Cole, Royal Alliance

Florida Insurance License

42% hold Florida Insurance License (LHV most common type)

Benefits at a Glance	\$2,000	\$1,300	\$750	\$500
 <p>Accelerating Your Business – FPATB’s new online series on the Art and Practice of Financial Planning. Each episode is between 25 – 50 minutes in length. Episodes are recorded and placed the FPATB Member Vault.</p> <ul style="list-style-type: none"> • Develop and deliver content (approved by FPATB) • Curate event chat and release up to two (2) sponsor-provided documents (PDF) during program • Develop attendee engagement activities • Supply brand prizes • If desired, host post-event informal virtual discussion • Permission to add your advertising tags in social media posting connected with this chapter sponsor activity 	Exclusive for 1 Quarter 6 Episodes	1 Episode per quarter. 3 quarters	2 Episodes	1 Episode
 <p>Education Program Opportunity to present a one-hour educational program for practice or credential management hosted by FPATB. Subject approval by FPATB. Recorded and placed the FPATB Member Vault.</p> <ul style="list-style-type: none"> • Develop and deliver content (approved by FPATB) • Curate event chat and release up to two (2) sponsor-provided documents (PDF) during program • Develop attendee engagement activities • Supply brand prizes • If desired, host post-event informal virtual discussion • Permission to add your advertising tags in social media posting connected with this chapter sponsor activity 		✓	✓	
 <p>Sponsor Hosted Webinar to be promoted by FPA of Tampa Bay. <i>(FPATB to promote sponsor-organized webinar, sponsor manages registration.)</i></p>	Monthly	1 per quarter	2 times (annually)	1 time
 <p>Sponsor White Paper or Article FPATB-facilitated quarterly distribution of sponsor-provided white-paper or article to FPATB contacts, you provide the content or URL.</p>	Monthly	1 per quarter	2 times (annually)	1 time
 <p>Sponsor Spotlight Opportunity to provide a video or podcast (MP4) for FPATB Member Vault.</p>	Monthly 2 minute video 15 minute podcast	Quarterly 2 minute video 15 minute podcast	2 times 1 minute video 10 minute podcast	1 time 1 minute video 10 minute podcast
 <p>Virtual Sponsor Profile 12-month virtual listing on PlanningTampaBay.org.</p>	Linked logo, company description, contact information	Linked logo, company description, contact information	Linked logo, contact information	Linked Logo
 <p>Happy Hour & Networking Events Sponsors are invited to attend networking events.</p>	✓	✓	✓	✓
 <p>Annual Passport for FPATB Events Participate in FPATB hosted events throughout the year.</p>	✓	✓		

A La Carte Opportunities

 <p>Sponsor a Speaker Don't have a speaker and presentation? Consider sponsoring an FPATB identified speaker. You'll be asked to introduce the session. \$750 up to \$1,300.</p>	 <p>It's on Us Want to support us when we return to in-person events? Coffee Breakfast, Cocktails & Networking up to \$750. Luncheon Dinner up to \$1,300.</p> 	 <p>Technology Sponsor Want to support us when we return to in-person events? Consider being a technology sponsor and help us go hybrid. \$750.</p>
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2022-23 Sponsor Commitment Form

Please remember to indicate your commitment level

\$2,000 \$1,300 \$750 \$500

If you would like to discuss partnership opportunities in greater detail, please contact our sponsorship team.

Michael Zmistowski
mzfp@aol.com
813-679-8288

Jodi Perez
jodi.perez@raymondjames.com
813-908-2701

If you would like to discuss any other questions regarding partnership benefits or general questions about our chapter, please contact Christine Brown at (813) 814-1630 or by sending a message to FPA@PlanningTampaBay.org.

All Sponsorships are based on the calendar year. FPA of Tampa Bay reserves the right to require all membership literature, correspondence and ad submission to conform to our policies and format regulations, and may require all sponsor speaker presentations be eligible for quality continuing education credit, as well as speaker outlines, bios and handouts be submitted by the requested due date in order to be eligible for a sponsor speaker presentation time for the chapter meeting or other speaking events.

Company Name _____

Web site _____

Primary Sponsor Contact Information

Name _____

Company _____

Title _____

Address _____

City _____ State _____ ZIP _____

Phone _____ Email _____

Web Site _____

Billing Information

Name _____

Company _____

Title _____

Address _____

City _____ State _____ ZIP _____

Phone _____ Email _____

Payment Method: Please Invoice Check Enclosed Credit Card

Send checks made payable to FPA of Tampa Bay to

FPA of Tampa Bay
12191 W Linebaugh Ave # 312
Tampa, FL 33626

Payments by credit card can be made by visiting

<http://PlanningTampaBay.org/2023-Sponsorships>
or by calling the chapter office at (813) 814-1630.