



OF GREATER KANSAS CITY

Your Partnership Opportunities



FINANCIAL PLANNING ASSOCIATION
of GREATER KANSAS CITY

2017 PARTNERSHIP PROGRAM



Financial Planning Association of Greater Kansas City

CHAPTER AT A GLANCE

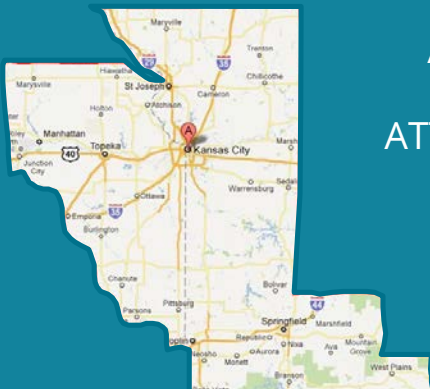
NUMBER OF MEMBERS:
Approximately 400

CHAPTER DEMOGRAPHICS:

- **74%** CFP® professionals
- **42%** life insurance license
- **39%** health insurance license
- **37%** SEC registered RIAs
- **39%** Series 7
- **28%** variable annuity license
- **21%** state registered RIAs

Chapter Meetings:

The FPA of Greater Kansas City hosts nine chapter meetings throughout the year. Each chapter meeting is structured to facilitate networking as well as to provide CFP® and Missouri/Kansas Insurance Continuing Education credits. Chapter membership and attendance at chapter meetings has grown significantly due to an increased programming budget allowing us to bring in nationally known speakers.



AVERAGE MEETING ATTENDANCE:
100+

SPECIAL EVENTS

Career Day

Annual event designed to engage future members of our profession. We partner with colleges and universities from around the region to promote financial planning as a career choice. Typically, around 50 college students attend this half-day workshop.

Golf Tournament

Our annual golf tournament allows members, associated professionals and partners to network while enjoying a premier private Kansas City golf course.

Social Event

Following our May ethics chapter meeting, and one of our fall chapter meetings, we host social events for members, guests and partners.

Other Chapter Events

Our chapter hosts many additional events throughout the year. These range from public education events like pro bono financial planning seminars, or a TV news call-in show, to social events like NexGen happy hours and our annual volunteer/new member recognition.



We are thrilled to report that our Chapter has experienced unprecedented growth – in both membership and attendance at our chapter meetings. This growth has provided us with a wealth of opportunities including the ability to bring in nationally recognized speakers. What this means for you as a partner of FPAGKC 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 FPAGKC, you will have direct access to over 400 financial services professionals in the Greater Kansas City area, northern Kansas and western Missouri. 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 Kansas City area.



Should you have questions, please contact Michael Wren, 2017 FPA of Greater Kansas City Partnership Chair, (913) 403-0600, mike.wren@legacykc.com.

Total Benefits Package

Benefit	Platinum	Gold	Silver	Bronze
Meetings				
One chapter meeting sponsorship / 15 minute presentation	●			
Invitation to November chapter meeting including free guests and 2 minute presentation	●			
One monthly chapter meeting co-sponsorship w/ 5 minute presentation		●		
Attendee list from sponsored meeting	●	●		
One annual pass to all monthly chapter meetings (one attendee per meeting, cannot be carried over)	●	●	●	
Recognition during all chapter meetings & via PowerPoint display at events	●	●	●	●
Advertising				
Feature article in one newsletter – up to a page	●			
Electronic membership list distributed quarterly	●			
Ad in chapter newsletter – up to a page	●	●		
Firm logo & link to company website	●	●		
Firm name & contact info on website	●	●	●	●
Firm recognition in all chapter newsletters	●	●	●	●
Other Events				
Exclusive admission to new member events & annual volunteer recognition events	●			
Booth space & one registration at Career Day Event	●			
Two tickets to member social/annual athletic event	●			
Registration of one foursome at Annual Golf Tournament	●			
Hole sponsorship with signage at Annual Golf Tournament	●	●		
Partner Contribution	\$5,000	\$3,000	\$1,500	\$500

* Number of Platinum Partners is limited to nine per year. Once approved as a Platinum Partner, you will have the first opportunity to renew your partnership each year. In-kind contributions may be considered for partnership benefits with prior approval of the Board of Directors.



ABOUT FPA

The Financial Planning Association is the largest membership organization for personal financial planning experts in the U.S. and includes professionals from all backgrounds and business models. We help connect thousands of consumers to competent and ethical planners who uphold the FPA Standard of Care.

Members of FPA are those who commit to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve. They deliver advice using an objective, client-centered, ethical process. FPA membership consists of financial planners and all those who support the financial planning process. FPA's nationwide network of nearly 100 chapters encourages professional development and networking on a local level.

FPA invites you to become partners in our mission. By partnering with FPAGKC, you demonstrate a commitment to the financial planning profession and high ethical standards and help us strengthen the financial planning community.

TESTIMONIALS

"As soon as you walk into the room at your first FPA meeting, you realize you are joining a group of true professionals. The financial industry in the Kansas City area is so dynamic and robust. What I love most about the FPA is that you will meet advisors from every corner of our industry, and they all share the same commitment to be among the best at providing financial advice and service to their clients. I am proud to be a sponsor."

~ Jason Young, Senior Vice President, American Funds

"American Century Investments' partnership with the Financial Planning Association of Greater Kansas City along with our involvement with the Board of Directors allows us to connect with advisors and build relationships through the many valuable programs and events. The first partnership check that we write every year is to the FPA. We are privileged to be a continued partner and member of the chapter."

~ Evan C. Mayhew, Internal Wholesaler,
American Century Investments

FPAGKC

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Michael Wren

2017 FPA of Greater Kansas City Partnership Chair
(913) 403-0600
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OF GREATER KANSAS CITY

Company _____

Web address _____

Email address _____

For use on our website

Primary contact _____

Phone _____ Email _____

Mailing address _____

City _____ State _____ ZIP _____

Please initial next to your desired partnership level.

_____ Platinum Partner \$5,000 _____ Silver Partner \$1,500

_____ Gold Partner \$3,000 _____ Bronze Partner \$500

By initialing above and signing below, I understand that this agreement serves for a period of one year ending Dec. 31, 2017, and the fee is nonrefundable.

Signature of company representative

Date

PAYMENT OPTIONS

_____ Enclosed is a check in the amount of \$_____

_____ Please invoice me for \$_____

_____ Please charge \$_____ to the following credit card: _____

MasterCard/VISA/Amex/Discover number

Expiration date

Signature of cardholder

Upon receipt of this form, you will be contacted by a member of the FPAGKC partnership team.

Mail to:
FPAGKC 825 S. Kansas Avenue, Suite 500 • Topeka, KS 66612

Fax to: 785-233-2206
Email to: info@fpakc.org