

Dear Corporate Partners & Prospective Corporate Partners,

**RE: The 2010 FPA Dallas/Fort Worth Corporate Partnership Program**

On behalf of the FPA of Dallas/Fort Worth, I would like to thank you for your interest in becoming a Corporate Partner of the FPA Dallas/Fort Worth chapter. This program is designed specifically with partners such as yourself in mind, and I hope you'll take a few minutes to review the information I have included in this package.

Our Corporate Partner program is an exclusive program, structured to allow only a few select partners representing a cross section of the industry to participate at any given time. This invitation is extended to no more than a few partners in your business category.

***Attached you will find a new, updated, benefit package for 2010!***

We are now offering three levels of sponsorship, Platinum, Gold and Silver, which each include a variety of benefits to suit the needs of your company. Please note that the Platinum level is now ***sold out*** for 2010. New partners who sign on at the Gold level who would like to upgrade to the Platinum level in 2011 will be given the first right of refusal to do so at the end of 2010. Gold sponsors are also eligible to bring in speakers for our minor events in 2010 (Study Groups and Tarrant County Meetings) and we will gladly work with you on that benefit.

The Gold level is currently the best value and includes the most benefits. The Silver level now takes the place of our previous "Symposium only" category and now comes with a few extra benefits that our previous Symposium only sponsors should appreciate. The purpose, going forward, is to incorporate all our corporate fund raising under Corporate Partnership eliminating the need for other chapter program chairs duplication of efforts in raising funds for their event from the same sponsor pool.

I hope you will take time to consider our special invitation. If you have any questions about the new tiers we have presented, please give me a call at (972) 715-6227 or email me at [Cliff.Layfield@Willis.com](mailto:Cliff.Layfield@Willis.com).

Sincerely,

Cliff Layfield, CIC, ARM  
Corporate Partnership Director  
FPA Dallas/Fort Worth Chapter

## Benefits At A Glance – Year 2010

	Benefits	Value	Platinum <b>SOLD OUT FOR 2010</b>	Gold (G) \$4,000	Silver (S) \$3,000
<b>NEW</b>	<b>New! Sponsor company events/conference listing on FPA website</b>	\$300	•	•	•
1	Premium exhibit space for Symposium	\$3,500	•		
2	Major Event Co-Sponsor	\$1,000	•		
3	Two ½ page ads - Platinum One ½ page ad - Gold	\$360 \$180	•	•	
4	Six blast emails a year	\$1,500	•		
5	10 min. Chapter Meeting Presentation	\$300	•		
6	Continuing Education Presentation Opportunities	\$500	•		
7	One feature article in monthly newsletter	Priceless	•		
8	Two blast emails a year	\$500	See#4	•	
9	Chapter Meeting Exhibit (5 x \$250)	\$1,250	•	•	
10	Minor Event Co-Sponsorship	\$2,500	•	•	
11	One year license for access to our membership roster with log & listing	Priceless	•	•	•
12	<b>Symposium Exhibit</b> space	\$3,000	See #1	•	•
13	Five lunch meeting invitations	\$175 ea.	2 per meeting	1 per meeting	1 per meeting
14	Year, long listing on website (link to your website)	\$500	See #2	•	•
15	Regular recognition as Corporate Partner	Priceless	•	•	•
	<b>Total Benefit Value</b>		<b>\$11,760</b>	<b>\$8,105</b>	<b>\$6,175</b>

## Summary of FPA DFW Corporate Partnership Benefits

**New for 2010: Sponsor company/firm events listed on FPA DFW Website (P) (G) (S)**

A new page will be a part of the FPA DFW website that will feature any sponsors conference, meeting or event during 2010, along with any details you would like to include and/or links to register. See pg 9 for details

1. Symposium with premium location – taking advantage of highest flow of participant traffic. (P)
2. Co-sponsoring of major events – Symposium, Ball Park, Career Day, Regular Chapter Meetings(P)
3. Advertising – a \$360 value on two half page ads (P); a \$180 value on one half page ad (G)
4. For Platinum sponsors we will send a blast email, to our membership, 6 times a year (P)
5. 10 minute chapter meeting presentation, to the first 10 commitments for Platinum sponsors! (P)
6. Speaking opportunities – ability to work with Education and Symposium chair to bring in speakers for an event (regular meeting or symposium) cost is over and above sponsorship (P). Any speaker honorariums or travel expense are in addition to sponsorship fee.
7. A feature article in monthly newsletter (P)
8. For Gold sponsors we will send a blast email, to our membership, 6 times a year (G)
9. Table exhibit at all five chapter meetings (P) (G)
10. Minor event co-sponsor –ThirdThursday with the FPA, new member breakfast/orientation, FTW Chapter meetings, Media Training Day, Intern Appreciation, and 302Crew events (G) (S)
11. One year license for access to our membership roster (P) (G) (S)
12. Symposium exhibit (non premium location) (G) (S)
13. Five lunch meeting invitation 2 per meeting for (P) 1 for (G) 1 for (S)
14. Website listing (with linking to your website) for full year (P) (G) (S)
15. Regular recognition as Corporate Partner (P) (G) (S)

**(P) Platinum | (G) Gold | (S) Silver**

## 2010 Letter of Agreement for FPA DFW Corporate Sponsors

The undersigned party (herein after "Partner") hereby applies to become a Corporate Partner of the FPA Dallas/Fort Worth chapter under the terms of the "Corporate Partnership Program" (herein after "Program") for the current partnership year. If Partner is accepted to the Program, Partner further agrees to a partnership contract term of one calendar year, payable upfront.

The FPA Dallas/Ft Worth chapter (herein after "FPA DFW") strives to develop quality partnership relationships with partners who have a long-term interest in supporting the financial planning industry. Partner understands that Program has the ultimate right to refuse acceptance to any party without recourse in its pursuit of that goal.

So, in recognition of the relationship that the Program seeks to establish with its partners, the Program limits the number of partners in a given year. Furthermore, the qualified partners shall represent a cross-section of the industry. In most cases the invitation has been extended to only a few qualified partners in each business category.

Benefits will be based on the level of sponsorship selected by the partner. See pages 2-3 for a full list of benefits for Platinum, Gold and Silver levels.

**All levels do include exhibit space at the FPA DFW Financial Planning Symposium which will be held on May 7, 2010.**

### **Responsibilities of Partner will include:**

- Payment of annual Corporate Partner fee (based on level selected).
- Active participation in the education of our membership on your company's products and services
- Provide camera-ready material for your advertisement (JPG or PDF; and EPS format).
- Provide booth materials and set up at the annual FPA DFW Financial Planning Symposium.
- Maintain good corporate citizenship and standing.

### **FPA DFW may:**

- At its sole discretion, accept, deny, non-renew, and/or terminate Partner.
- Schedule, reschedule, or cancel, at its discretion, meeting dates or presentations and will not be responsible for any Partner liabilities, financial or otherwise, arising from such actions.
- Change the Corporate Partnership fee and/or prompt payment discount at renewal within a 30 day notice.

Continued...

## 2010 Letter of Agreement for FPA DFW Corporate Sponsors

### Page Two

Partner agrees to the above terms, and hereby applies for a partnership with the FPA-DFW in the Program on the \_\_\_\_\_ day of \_\_\_\_\_, 200\_\_.

Signed by:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Fax

\_\_\_\_\_  
E-mail

\_\_\_\_\_  
Website (to be linked to FPA DFW website)

\* If you are a new FPA DFW Corporate Partner, or if you are an existing Partner and your logo has changed, please send your company logo to Melisa Hall, FPA DFW Executive Director, at [execdir@fpadfw.org](mailto:execdir@fpadfw.org) in JPG or GIF format.

\* If the information to be listed on the FPA DFW website is different from above, please include how you would like the website listing to read below. If the contact information above is how you would like to be listed on the website please leave blank.

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Fax

**Fax this page, the benefit selection sheet for your level of sponsorship (Gold or Silver), along with the Sponsorship Invoice to 972-747-0409**

*The Heart of Financial Planning™*

**Your contact for benefit requests or scheduling is Melisa Hall  
execdir@fpadfw.org / 972-747-0407**

**FPA DFW GOLD Sponsor Benefit Selection Sheet**

Will you require exhibit space at the FPA DFW Financial Planning Symposium to be held on May 7, 2010?

Yes       No

Select a "Minor Event" that you would like to co-sponsor. This is included in your sponsorship fee. Events are based on a first come, first serve basis.

Networking Happy Hour \_\_\_\_\_      New Member Orientation \_\_\_\_\_      Fort Worth Chapter Mtg \_\_\_\_\_

Media Training Day \_\_\_\_\_      Intern Appreciation Event \_\_\_\_\_      FPA Study Groups \_\_\_\_\_

**FPA DFW SILVER Sponsor Benefit Selection Sheet**

Will you require exhibit space at the FPA DFW Financial Planning Symposium to be held on May 7, 2010?

Yes       No

**Your contact for benefit requests or scheduling is Melisa Hall  
execdir@fpadfw.org / 972-747-0407**

## Deadlines & Specs for Emails, Newsletter Advertising & Articles

### **Broadcast E-Mails to FPA DFW Membership**

Gold Sponsors – 2 per year

The email should be sent to the FPA DFW office ([execdir@fpadfw.org](mailto:execdir@fpadfw.org)) via email and in an HTML format. The email can include any content of your choice, including graphics. Please specify if there are any special instructions, attachments, or if there is a specific date you would like for it to be sent.

The email will be sent out with you listed as the sender and recipients will see that it is coming directly from your email address. Please specify the email address you would like listed as the 'sender'.

### **Newsletter Advertising Credits**

Gold Partners – 1 half page ad per year

- Size of ad: 5 ½" x 7 ½" (color or B&W)
- Format of ad: JPG or PDF
- Email ad in print ready format to: [execdir@fpadfw.org](mailto:execdir@fpadfw.org)

### **2010 Newsletter Deadlines:**

January/February Issue	Deadline: December 15, 2009
March/April Issue	Deadline: February 15, 2010
May/June Issue	Deadline: April 15, 2010
July/August Issue	Deadline: June 15, 2010
September/October Issue	Deadline: August 16, 2010
November/December Issue	Deadline: October 15, 2010

*2011 deadlines to be announced*

## New Benefit for 2010

### Sponsor Company hosted event, conference or meetings

In 2010 FPA DFW will have a new page on our website where sponsors can have any company hosted event, conference or meeting listed along with details (150 word maximum) and links to the event and/or registration page.

This page will appear under the Partners tab at the top of the FPA DFW home page where any visitor can access it.

This will give you great exposure to any local events you may host and/or Webinar's that you would like to make the DFW membership aware of.

#### **To utilize this benefit:**

Send the details (150 word maximum), event date and any links you would like to use to [execdir@fpadfw.org](mailto:execdir@fpadfw.org). The content should be in a format that we can copy and paste directly onto the web page. If you send a PDF we will only be able to add the name of the event with a link to the PDF document only.

Once the event date passes the event will be removed from the web page so that we may keep it current.

There is no limit on the number of events you can post.

## 2010 FPA DFW Corporate Partnership Invoice

Enter total for the selected level of Partnership in the "Total Due" field.

FPA Rep	Contract Starting Date	Contract Ending Date	Terms
	01/01/10	12/31/10	Net due at contract signing.

Select	Description	Unit Price	Total
<input type="checkbox"/>	FPA DFW <del>Platinum</del> Partnership <b>SOLD OUT</b>	5000.00	
<input type="checkbox"/>	FPA DFW <b>Gold</b> Partnership	4000.00	
<input type="checkbox"/>	FPA DFW <b>Silver</b> Partnership	3000.00	

Total Due \_\_\_\_\_

- Will pay by check (due within 30 days)**  
 Mail to: FPA DFW, P.O. Box 261750, Plano, TX 75026  
 Payable to: FPA Dallas/Fort Worth

- Please charge my credit card for the total amount due \$ \_\_\_\_\_**

CC # \_\_\_\_\_ Exp Date \_\_\_\_\_

CDC Code \_\_\_\_\_ Name on card \_\_\_\_\_

Thank you for your participation in our Corporate Partnership Program.  
 We look forward to working with you during the coming year.