

Dear Corporate Partners,

RE: The 2012 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 the 2012 Corporate Partner program 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.

Much of the success of the FPA DFW chapter is due to the support of our corporate partners. Our partners' financial support helps us provide nationally recognized speakers, special activities and events, and facilities that attract today and tomorrow's top financial planning professionals.

Your commitment of support for the FPA DFW chapter will be rewarded throughout the year with a variety of opportunities to gain direct recognition for your business, the services you provide, and opportunities for face-to-face discussions with these decision-makers. Depending upon the level of sponsorship that you select, you'll have numerous opportunities to establish new contacts and solidify existing relationships.

We strive to enhance the DFW partnership program each year based on feedback from current sponsors and we are very pleased to announce that for 2012 we will continue with the Double Platinum level as well as new exclusive benefits and sponsor opportunities.

Attached you will find a new, updated, benefit package for 2012!

We offer four levels of sponsorship: Double Platinum, Platinum, Gold and Silver, which each include a variety of benefits to suit the needs of your company. The Double Platinum, Platinum and Gold levels are the best values and include the most benefits. The Silver level now takes the place of our previous 'symposium only' category and now comes with several extra benefits that you can use throughout your 12 month sponsorship.

By limiting the number of partners that we accept for each level we will continue to make this a more exclusive program for each and every partner. The program will be structured to allow only a few select partners representing a cross section of the industry to participate at any given time. This assures that all partners have their choice of dates, programs and events that they would like to co-sponsor and/or provide speakers for.

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) 884-6156 or email me at Laura.Biesemeyer@summitalliance.net

Sincerely,

Laura Biesemeyer
Corporate Partnership Director
FPA Dallas/Fort Worth Chapter

The Heart of Financial Planning™

	Benefits	Value	Double Platinum Limit 1 (DP) \$8,500	Platinum Limit 8 (P) \$6,000	Gold Limit 10 (G) \$4,500	Silver Limit 9 (S) \$3,000	Non-Profit Level Limit 3 (NP) \$2,500
	New! Sponsor company webinars, events & conference listings on FPA website	\$300	•	•	•	•	•
1	10 min. Sponsor Spotlight Presentation at the 2012 Symposium & at one FPA DFW Chapter Luncheon Event – DP Level Benefit	\$500	•				
2	Keynote Speaker – Presenting Sponsor at 2012 Symposium – DP Level Benefit	\$2,000	•				
3	Premium exhibit space for Symposium	\$3,500	•	•			
4	Six blast emails a year	\$1,500	•	•			
5	Major Event Co-Sponsor	\$1,000	•	•			
6	One feature article in monthly newsletter	\$300	•	•			
7	50 Minute Educational Speaker at 2012 Chapter Luncheon Meeting	\$500		•			
8	10 min. Sponsor Spotlight Presentation at a 2012 Chapter Luncheon Meeting	\$300	•	•			
9	Three Full Page Ads – Double Platinum (including one in the symposium issue) Two ½ Page ads – Platinum One ½ Page ad – Gold & Non-Profit	\$1,050 \$360 \$180	•	•	•		•
10	Chapter Meeting Exhibit (5 x \$250)	\$1,250	•	•	•		
11	10 min Spotlight at one FPA DFW Board Mtg. <i>New Gold Sponsor Benefit!</i>	\$300			•		
12	Sponsor/host a Study Group session in 2010	\$500			•		
13	Two Blast Emails a Year	\$500			•		
14	Minor Event Co-Sponsorship	\$2,500			•		
15	One year license for access to our membership roster with log & listing	Priceless	•	•	•	•	•
16	Symposium Exhibit space	\$3,000	See #3	See #3	•	•	•
17	Five lunch meeting invitations	\$175 ea.	2 per meeting	2 per meeting	1 per meeting	1 per meeting	n/a
18	Year, long listing on website (link to your website)	\$500	•	•	•	•	•
19	Regular recognition as Corporate Partner	Priceless	•	•	•	•	•
	Total Benefit Value		\$14,500	\$11,800	\$9,200	\$6,000	\$3,500

Explanation/Summary of FPA DFW Corporate Partnership Benefits

(DP) Double Platinum | (P) Platinum | (G) Gold | (S) Silver | (NP) Non-Profit

Double Platinum Partner – Limit 1 at this exclusive level
Platinum Partner: 8 max | Gold Partner: 11 max | Silver Partner: 9 max

Sponsor company/firm events listed on FPA DFW Website (DP) (P) (G) (S) (NP)

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

1. **Double Platinum Benefit:** 10 minute presenting sponsor spotlight presentation at the May 24, 2012 Symposium luncheon and one sponsor spotlight at a FPA DFW Chapter Meeting Luncheon (DP)
2. **Double Platinum Benefit:** Keynote speaker – presenting sponsor at the May 24, 2012 FPA DFW Symposium. (DP)
 - Keynote speaker will be scheduled at the discretion of the FPA DFW Symposium Director and will be the opening, mid-day, or closing keynote – this is based on the overall speaker line-up & speakers travel needs
 - Keynote speaker must be a nationally recognized speaker
 - Keynote speaker will speak for 50 – 90 minutes, dependent upon overall agenda
 - As the presenting symposium sponsor, your company logo will be included on all promotional event materials, event website, blast emails and signage
3. Symposium with **premium location**—taking advantage of highest flow of participant traffic. (DP) (P)
4. Six blast emails to the FPA DFW membership, per year (DP) (P)
5. * Co-sponsoring of major events – Networking Happy Hour, Career Day, Regular Chapter Meetings (DP) (P)
6. A feature article in monthly newsletter (DP) (P)
7. 50 minute educational speaker at one 2012 FPA DFW chapter luncheon meeting (P)
 - Speaker will be scheduled at the discretion of the FPA DFW Education Director - this is based on the overall speaker line-up for the year & speakers travel needs
 - The topic must be a timely, relevant and advanced educational topic and must be CE approvable
 - Speaker will speak for 50 minutes
8. 10 minute chapter meeting sponsor spotlight/commercial presentation (DP) (P)
9. Advertising – a \$1050 value on 3 full page ads (DP); \$360 value on two half page ads (P); a \$180 value on one half page ad (G) (NP)

10. Table exhibit at all five chapter meetings – table reservation required (DP) (P) (G)
11. 10 minute sponsors spotlight presentation at one 2012 FPA DFW Board Meeting – access to the 15 DFW leaders (G)
12. Host/Sponsor a study group/case study session in 2012. Sponsor will be responsible for providing venue, speaker, refreshments, and CE credits – FPA DFW will market and promote to all DFW members to increase visibility and attendance. FPA can also assist with CE credits if necessary. Coordinate through Melisa Hall at execdir@fpadfw.org. The date will be subject to availability based on similar events already scheduled. Schedule your date early to ensure your choice of dates. (G)
13. Two blast emails to the FPA DFW membership, per year (G)
14. **Minor event co-sponsor –FPA DFW Tarrant County chapter meetings, new member breakfast/orientation, Media Training Day or Intern Appreciation (G)
15. One year license for access to our membership roster (DP) (P) (G) (S) (NP)
16. Symposium exhibit – May 24, 2012 (non premium location) (G) (S) (NP)
17. Five FPA chapter lunch meeting invitation 2 for (DP); 2 for (P); 1 for (G); 1 for (S)
18. Website listing (with link to your website) for a full year (DP) (P) (G) (S) (NP)
19. Regular recognition as Corporate Partner in newsletter, on website, signage at events, in PPT used at chapter meetings, etc. (DP) (P) (G) (S) (NP)

20. DUE DILIGENCE TERMS & CONDITIONS:

- o All perspective corporate partners will be subject to a due diligence review and must currently be and remain in good standing with any and all industry regulating agencies (e.g. FINRA, BBB, etc.)

21.(DP) Double Platinum | (P) Platinum | (G) Gold | (S) Silver | (NP) Non-Profit

* Each major event has limited sponsor slots available and will be assigned on a first come first serve basis

** Each minor event has limited sponsor slots available and will be assigned on a first come first serve basis

2012 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 2-4 for a full list of benefits for Double Platinum, Platinum, Gold and Silver levels.

DUE DILIGENCE TERMS & CONDITIONS:

All prospective corporate partners will be subject to a due diligence review and must currently be and remain in good standing with any and all industry regulating agencies (e.g. FINRA, BBB, etc.)

All levels do include exhibit space at the FPA DFW Financial Planning Symposium which will be held on May 24, 2012.

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...

2012 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 _____, 20__.

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 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 (Double Platinum, Platinum, Gold or Silver), along with the Sponsorship Invoice to 972-747-0409

FPA DFW DOUBLE PLATINUM Partner Explanation of Benefits
& Benefit Selection Sheet

****Presenting Sponsor & Keynote Speaker at the Spring Symposium – May 24, 2012:** This benefit will be coordinated through our Director of Special Events to ensure the best fit and topic for this event. The final topic and speaker approval are at the sole discretion of FPA DFW. The speaker must be a nationally recognized name and the topic should appeal to a broad audience. The time slot for the keynote speaker will also be at the sole discretion of FPA DFW and will be either the opening keynote, mid-day keynote or closing keynote.

The person working with you on this benefit for 2012 will be:

Melissa Brennan, Director of Special Events – mbrennan@vfaonline.com – (214) 346-5880

Select a date for your 10 minute sponsor spotlight at a FPA DFW chapter meeting from the following 2012 dates. Dates are on a first come first serve basis (limit of 2 per date) – please add “1” to your first choice and “2” to your second choice. *Dates are subject to change with notice.*

February 3 ___ March 6 ___ June 12 ___ September 18 ___ November 13 ___

Presenting Sponsor Benefits:

Melisa Hall, execdir@fpadfw.org will assist you with your presenting sponsor benefits including:

- Exclusive prime booth placement
- Materials and logo promotion listing your company as the presenting sponsor
- 10 minute sponsor spotlight at the symposium luncheon

Select a “**Major 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 ___ Career Day ___ Regular Chapter Meeting ___

Double Platinum Partners also receive:

- Six blast emails per year
- Three full page ads in the FPA DFW newsletter (including one in the symposium issue)
- One feature article in the FPA DFW newsletter
- Chapter meeting exhibit space (5 x per year)
- Five lunch meeting invitations (2 per meeting, 5 x annually)
- Invitations to attend all FPA DFW events
- Chapter demographic report & membership list, sent out quarterly

See the Advertising Sheet (page 11) for details on blast emails, newsletter advertising and newsletter article specs as well as deadlines for 2012.

**** See speaker guideline requirements on page 12**

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

P.O. Box 261750 Plano, Texas 75026-1750
Phone: 972-747-0407 Fax: 972-747-0409
E-Mail: execdir@fpadfw.org Website: www.fpadfw.org

FPA DFW **PLATINUM** Partner Benefit Selection Sheet

Will you require exhibit space at the FPA DFW Financial Planning Symposium to be held on May 24, 2012?

Yes No

Select a date for your 10 minute sponsor spotlight at a FPA DFW chapter meeting from the following 2012 dates. Dates are on a first come first serve basis (limit of 2 per date) – please add “1” to your first choice and “2” to your second choice. *Dates are subject to change with notice.*

February 3 ____ March 6 ____ June 12 ____ September 18 ____ November 13 ____

Select a “Major 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 ____ Career Day ____ Regular Chapter Meeting ____

** Platinum Partners may also provide a speaker for a FPA DFW chapter meeting or a symposium breakout session. Your contacts for this benefit in 2012 are as follows. See the chapter meeting dates for 2012 listed above. The symposium will be held in May 2012.

Jonathan Meaney, Director of Education

(214) 363-4200

jmeaney@cascfm.com

Melissa Brennan, Director of Special Events

(214) 346-5880

mbrennan@vfaonline.com

Platinum Partners also receive:

- Six blast emails per year
- Two half page ads in the FPA DFW newsletter
- One feature article in the FPA DFW newsletter
- Chapter meeting exhibit space (5 x per year)
- Five lunch meeting invitations (2 per meeting, 5 x annually)
- Invitations to attend all FPA DFW events
- Chapter demographic report & membership list, sent out quarterly

See the Advertising Sheet (page 11) for details on blast emails, newsletter advertising and newsletter article specs as well as deadlines for 2012.

** See speaker guideline requirements on page 13

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

FPA DFW **GOLD** Partner Benefit Selection Sheet

Will you require exhibit space at the FPA DFW Financial Planning Symposium to be held on May 24, 2012?

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 based on availability.

New Member Orientation _____ Fort Worth Chapter Mtg _____ Media Training Day _____
Intern Appreciation Event _____

Select a date to do a 10 minute sponsor spotlight at a FPA DFW Board Meeting – presenting to 15 of the FPA DFW Leaders. Dates are subject to availability. Please indicate your first, second and third choice.

Jan _____ Feb _____ Mar _____ Apr _____ May _____ June _____
July N/A Aug _____ Sept _____ Oct _____ Nov _____ Dec _____

New! Study Group Sessions: This is a new Gold Partner benefit for 2012. The partner (you) will be responsible for providing the venue, speaker, CE credits and refreshments. FPA DFW's role will be to market and promote the event to the DFW membership to ensure visibility and increase attendance. This event should be coordinated through Melisa Hall at execdir@fpadfw.org.

Dates and timing are subject to availability and should not conflict with any prior scheduled FPA DFW event. We recommend that you secure your date early in the year to ensure the best choice of dates.

FPA DFW **SILVER** Partner Benefit Selection Sheet

Will you require exhibit space at the FPA DFW Financial Planning Symposium to be held on May 24, 2012?

Yes No

FPA DFW NON-PROFIT Level Partner Benefit Selection Sheet

Will you require exhibit space at the FPA DFW Financial Planning Symposium to be held on May 24, 2012?

Yes No

This is a new tier/level that has been added for 2012. See page 2 for a full list of benefits. We will limit this level to the first three non-profits that apply. Non-profits that apply after we have reached our maximum of three may be added to a waiting list or can upgrade to a higher tier/level for 2012.

This tier is essentially the same as the silver level, with the following differences.

- This level includes one half page had a year.
- This level does not include the pre-paid lunch meetings. Sponsors at this level may still attend the FPA DFW luncheon meetings or events and are eligible for the FPA member rate when registering.

Deadlines & Specs for Emails, Newsletter Advertising & Articles

Broadcast E-Mails to FPA DFW Membership

Double Platinum & Platinum Partners – 6 per year

Gold Sponsors – 2 per year

The email should be sent to the FPA DFW office (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

Double Platinum Partners: 3 full page ads per year

Platinum Partners – 2 half page ads per year

Gold Partners & Non-Profit Partners – 1 half page ad per year

- Size of ad: Full page: 7 ½" x 10 ½" Half page: 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

Newsletter Feature Article Credit

Double Platinum & Platinum Partners – 1 feature article per year

- One standard size page (8 ½ x 11)
- Size 10 Ariel font
- Logo and graphics can be included

2012 Newsletter Deadlines:

January/February Issue	Deadline: December 15, 2011
March/April Issue	Deadline: February 15, 2012
May/June Issue	Deadline: April 15, 2012
July/August Issue	Deadline: June 15, 2012
September/October Issue	Deadline: August 16, 2012
November/December Issue	Deadline: October 15, 2012

2013 deadlines to be announced

New Benefit for 2012 (cont'd from 2011)

Sponsor Company hosted webinars, events, conferences or meetings

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

This page appears under the EVENTS 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 words maximum), event date and any links you would like to use to 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. Following is an example of an event listing.

Topic

Hosted by: Sponsor Name

Date/Time

Brief description of event, including speakers names if possible.

Dial In: (111) 111-1111 **Passcode:** 111111

CE: if applicable

Link to register for or join the meeting

Cost: \$ ___

Event website – if applicable

FPA DALLAS/FORT WORTH SPEAKER GUIDELINES

The following guidelines apply to all Double Platinum and Platinum Corporate Partners who will be providing 50 minute educational speakers/topics for a FPA DFW event during 2012.

- Promotional materials (speaker bio, topic, outline, etc) are due to FPA DFW no later than 45 days prior to the meeting date. If the content is late there will be a risk of losing your speaking spot as it will have to be filled with an outside speaker.
- A minimum of 2 speakers / topics is due to the FPA DFW Education Director for consideration no later than 60 days prior to the meeting date. The topic will be chosen based on content and relevancy to the FPA DFW audience. **The presenting speaker must be a high-profile name that is recognized on the speaker circuit.**
- Topics must be CFP and CPA CE credit eligible when at all possible. FPA DFW will file for all CE credits. Insurance topics are acceptable and encouraged as well.
- The topic and CE credits are the key element to attendance numbers at our chapter events. Sponsors are asked and encouraged to submit their best speakers for the best results and attendance numbers. An impressive speaker reflects well on the sponsoring company.
- Speakers will have 50 total minutes to talk, we request the topic be covered in 40-45 minutes and we will then have 5 to 10 minutes for Q&A.
- We would like to have a short introduction / bio provided by the sponsor to be used by the President or the Director of Education to introduce the speaker.

2012 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
<input type="checkbox"/> Laura Biesemeyer <input type="checkbox"/> Melisa Hall	01/01/12	12/31/12	Net due at contract signing.

Select	Description	Unit Price	Total
<input type="checkbox"/>	FPA DFW Double Platinum Partnership	8500.00	
<input type="checkbox"/>	FPA DFW Platinum Partnership	6000.00	
<input type="checkbox"/>	FPA DFW Gold Partnership	4500.00	
<input type="checkbox"/>	FPA DFW Silver Partnership	3000.00	
<input type="checkbox"/>	FPA DFW Non-Profit Level Partnership	2500.00	

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.