

THE FINANCIAL PLANNING ASSOCIATION OF GREATER INDIANA

The primary aim of the Financial Planning Association is to be the community that fosters the value of financial planning and advances the financial planning profession. The FPA's strategy to accomplish its objectives involves welcoming all those who advance the financial planning process and promoting the CFP® mark as the cornerstone of the Financial Planning Association.

OUR MEMBERS: We have approximately 400 members who are all involved in financial planning throughout the state of Indiana. Our members stretch from Evansville in southern Indiana to South Bend in northern Indiana.

STRATEGIC ALLIANCES: We feel it is extremely important to build the reputation of Financial Planning as a profession that can be trusted in our community. As professionals, we enjoy working across lines with other local professional groups to plan conferences and joint networking events. These professional groups would include:

- The Indiana CPA Society
 - The Estate Planning Council of Indianapolis
 - The Indianapolis Bar Association
 - IAIFA (Indiana Association of Insurance and Financial Advisors)
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UPCOMING EVENTS

- **2009 FPA of Greater Indiana Meeting Dates:** February 20th, May 1st, September 25th and November 20th (dates are subject to change).
- **Our Meeting Site has changed:** the September & November 2009 meetings will be held at the Barnes & Thornburg offices (11 South Meridian Street, downtown Indianapolis, above Borders) on the 5th Floor from 8:00 a.m.-12:45 p.m.

Please see our website for more information www.fpagrindiana.org

Patron, Corporate and Professional Affiliate Sponsorship

The FPA of Greater Indiana holds all of our Patron Sponsors, Corporate Sponsors and Professional Affiliate Sponsors in very high esteem. We provide a Sponsorship Manager so you will have one centralized person to help you find the best ways for your company to get involved in our FPA chapter. Please feel free to call Roxanne with any of your questions.

Roxanne M. McGettigan
Sponsorship Manager
FPA of Greater Indiana
226 N. New Jersey Street
Indianapolis, IN 46204
Phone: (317) 638-0402
roxmcgettigan@indy.rr.com

A Patron Sponsor, Corporate Sponsor or Professional Affiliate Sponsor might include any of the following:

- Firms that provide services or products that support financial planning (software, mutual funds, REITs, client management support systems, insurance etc).
- Professional service firms that support financial planning (Law or CPA firms, trust departments, insurance agencies, estate planning services etc).

A Patron Sponsorship, Corporate Sponsorship and Professional Affiliate Sponsorship agreement with FPA of Greater Indiana provides the following local benefits. It does not provide membership to the National FPA which must be purchased separately at www.fpanet.org/member/membership. A sponsor will enjoy all local membership benefits but would not receive National FPA emails, National CE opportunities or the monthly journal they publish.

GREATER INDIANA PATRON SPONSOR, CORPORATE SPONSOR AND PROFESSIONAL AFFILIATE SPONSOR BENEFITS:

• **Current Membership List:**

- You will have access to the members of our chapter through our confidential mailing list. This includes addresses and email addresses representing financial planners throughout much of Indiana. While being a sponsor, you may use this list as you deem appropriate. However, if you do not renew your yearly sponsorship with the FPA of Greater Indiana, you must cease from using the membership list.

• **Speaking Opportunities:**

- Each quarterly meeting will provide four 5 minute opportunities for our **Patron Sponsors and Corporate Sponsors** to briefly summarize how their services or products might help our financial planners. Those 16 slots will be scheduled by our Sponsorship Manager on a rotating schedule.
- Each quarterly new member breakfast will provide one-to-two 5 minute opportunities for our **Patron Sponsors and Corporate Sponsors** to briefly summarize their company, along with having an opportunity to meet the new

members in a smaller setting. Those eight slots will be scheduled by our Sponsorship Manager on a rotating schedule. **New members, patron sponsors, corporate sponsors and board members are invited to all 4 of these breakfasts; professional affiliate sponsors are invited to the breakfast in April.**

- As the BOD identifies technical topics for the quarterly and evening meetings, they will give preference to Patron Sponsors, Corporate Sponsors and Professional Affiliate Sponsors as speakers are identified.

- **4 Quarterly Meetings:**

- Company banner from **Patron Sponsor(s)** will be prominently displayed.
- Patron Sponsors, Corporate Sponsors and Professional Affiliate Sponsors are invited to have two representatives attend all meetings.
- Attending sponsors may request space on a sponsor table to display brochures, pamphlets, etc. to promote their business.
- All sponsor names will be displayed on the pull-down screen in the auditorium from 8:00-8:30 am.
- Attending sponsors will receive, by email, a list of attendees who were at the meeting.
- Meetings are held at Barnes & Thornburg's auditorium in downtown Indianapolis from 8:30 am to 12:45 pm on Fridays in February, May, September and November.
- Generally we offer 2-4 hours of CE. Please see our website for current and past PDF newsletter copies that detail all speakers and topics.

- **2-4 Special Evening Member Events:**

- **Patron Sponsors** will be recognized as the Title Sponsor for one "After Hours" event.
- Company banner from **Patron Sponsor(s)** will be prominently displayed.
- Patron Sponsors, Corporate Sponsors and Professional Affiliate Sponsors are invited to have two representatives attend all "After Hours" events.
- Two meetings are offered annually after work. Generally cocktails and appetizers are served.

- **New Member Breakfasts:**

- **Patron Sponsors and Corporate Sponsors** are invited to the quarterly New Member Breakfasts. These breakfasts are for the newest members to our Chapter and the Board of Directors.
- **Professional Affiliate Sponsors** are invited to the breakfast in April.
- Each breakfast is held at LaPeep Restaurant (across the street from the Fashion Mall at Keystone) from 8:00 – 9:30 a.m. (There is no cost to attend).
- 2009 dates: February 12th, April 9th, July 23rd and October 15th.

- **Newsletter:**

- Your company name, company profile, contact person(s), phone number, email and website will be displayed in each quarterly newsletter.
- All new Patron Sponsors, Corporate Sponsors and Professional Affiliate Sponsors will be recognized on the first page of our quarterly newsletter (this

recognition will be in the newsletter that coincides with the date of you joining as a sponsor).

- **Patron Sponsors and Corporate Sponsors** have an opportunity to publish one feature article in our quarterly newsletters annually. This can be a technical article or a section that discusses the services your firm brings to our planners to help them.
 - **Patron Sponsors and Corporate Sponsors** will receive one 1/8th ad in our quarterly newsletter annually. (The ad will need to be prepared by the patron and corporate sponsor.)
- **Networking with Members:**
 - At each quarterly meeting we will have a 40 minute mid-morning “networking” break with a light buffet brunch and the opportunity for sponsors to display information at tables at the back of the room.
 - Our BOD asks each member to give special preference to our Patron Sponsors, Corporate Sponsors and Professional Affiliate Sponsors as they ask for our time and attention so that Sponsors may educate us on their services.
- **Website:**
 - Your company name, company profile, contact person(s), phone number, email and a link to your business website will be provided on our website.
 - Rotating banner ads of all **Patron Sponsors and Corporate Sponsors** will be located on the home page (and most other pages) of our website.
 - **Patron Sponsors and Corporate Sponsors** will be able to post job listings on our website (along with FPA members) for \$50.00 per listing, lasting for two months.
- **Additional Patron Sponsor Benefits:**
 - Opportunity to host your own event for FPA members at your company location.
 - Serve as an advisor to the FPA board of directors (invited to attend 2 of the 4 board meetings).
 - Exhibit booth at the yearly forum (held in May).

The Financial Planning Association is the owner of trademark [and registration], service mark and collective membership mark rights in, and various U.S. registrations/applications for: FPA, FPA/Logo and FINANCIAL PLANNING ASSOCIATION. The marks may not be used without written permission from the Financial Planning Association.

SPONSOR BENEFITS

BENEFITS	PATRON SPONSOR \$2,000 (LIMIT OF FOUR)	CORPORATE SPONSOR \$1,000	PROFESSIONAL AFFILIATE SPONSOR \$500
PROMINENT DISPLAY OF COMPANY BANNER AT ALL MEETINGS AND EVENTS	X		
SERVE AS AN ADVISOR ON THE FPA BOARD OF DIRECTORS (INVITED TO ATTEND 2 OF THE 4 BOARD MEETINGS)	X		
OPPORTUNITY TO HOST YOUR OWN EVENT FOR FPA MEMBERS AT YOUR COMPANY LOCATION	X		
EXHIBIT BOOTH AT THE YEARLY FORUM (HELD IN MAY) (VALUE OF \$500)	X		
RECOGNITION AS THE TITLE SPONSOR FOR ONE "AFTER HOURS" EVENT	X		
FIVE MINUTE PRESENTATION AT ONE OF THE QUARTERLY MEETINGS	X	X	
FIVE MINUTE PRESENTATION AT ONE OF THE QUARTERLY NEW MEMBER BREAKFASTS (INVITATION TO PATRON & CORP. SPONSORS)	X	X	
FEATURE ARTICLE IN ONE OF THE QUARTERLY NEWSLETTERS	X	X	
1/8 TH PAGE AD IN ONE OF THE QUARTERLY NEWSLETTERS	X	X	
BANNER ADS LOCATED ON EACH PAGE OF THE WEBSITE (WWW.FPAGRINDIANA.ORG)	X	X	
ABILITY TO POST JOB LISTINGS (ALONG WITH FPA MEMBERS) ON THE WEBSITE FOR TWO MONTHS (\$50.00 PER LISTING)	X	X	
TWO REPRESENTATIVES FROM PATRON AND CORPORATE SPONSORS ARE INVITED TO ATTEND THE QUARTERLY NEW MEMBER BREAKFASTS	X	X	
ALL ATTENDING SPONSORS AT THE QUARTERLY NEW MEMBER BREAKFASTS WILL RECEIVE, BY EMAIL, A LIST OF THE ATTENDEES	X	X	
ONE REPRESENTATIVE FROM PROFESSIONAL AFFILIATE SPONSORS IS INVITED TO ATTEND THE NEW MEMBER BREAKFAST IN APRIL			X
ALL ATTENDING PROFESSIONAL AFFILIATE SPONSORS WILL RECEIVE, BY EMAIL, A LIST OF ATTENDEES AT APRIL'S NEW MEMBER BREAKFAST			X

BENEFITS (CONTINUED)	PATRON SPONSOR \$2,000 (LIMIT OF FOUR)	CORPORATE SPONSOR \$1,000	PROFESSIONAL AFFILIATE SPONSOR \$500
TWO REPRESENTATIVES ARE INVITED TO ATTEND THE FOUR QUARTERLY MEETINGS	X	X	X
TWO REPRESENTATIVES ARE INVITED TO ATTEND ALL "AFTER HOURS" EVENTS	X	X	X
COMPANY PROFILE AND CONTACT INFORMATION ON FPA'S WEBSITE WITH DIRECT LINK	X	X	X
COMPANY PROFILE AND CONTACT INFORMATION IN THE QUARTERLY NEWSLETTER	X	X	X
ACCESS TO APPROXIMATELY 400 MEMBERS OF THE ORGANIZATION THROUGH THE MAILING/E-MAIL LIST	X	X	X
NETWORKING WITH MEMBERS AT THE QUARTERLY MEETINGS DURING THE 40 MIN. BREAK	X	X	X
RECOGNITION AT QUARTERLY MEETINGS AS VALUED SPONSOR	X	X	X
OPPORTUNITY TO DISPLAY COMPANY BROCHURES AT EACH OF THE QUARTERLY MEETINGS	X	X	X
ALL ATTENDING SPONSORS AT THE QUARTERLY MEETINGS WILL RECEIVE, BY EMAIL, A LIST OF THE ATTENDEES	X	X	X
POTENTIAL SPEAKING ENGAGEMENTS ON TECHNICAL TOPICS	X	X	X

THE FINANCIAL PLANNING ASSOCIATION OF GREATER INDIANA

We look forward to helping you coordinate the specific benefits that are important to you and your company.

PATRON SPONSOR
CORPORATE SPONSOR AND
PROFESSIONAL AFFILIATE SPONSOR
ENROLLMENT

Company Name: _____

Contact Name: _____

Phone Number: _____ **Fax Number:** _____

Full Address: _____

E-mail: _____

Company Website: _____

- Annual Patron Sponsorship Fee: \$2,000**
- Annual Corporate Sponsorship Fee: \$1,000**
- Annual Professional Affiliate Sponsorship Fee: \$500**

(your annual sponsorship begins on the date we receive your check)

Please make check payable to the “FPA of Greater Indiana”. Mail checks to:

**Roxanne M. McGettigan
Sponsorship Manager
FPA of Greater Indiana
226 N. New Jersey Street
Indianapolis, IN 46204**

**2009/2010 SPONSORS OF THE
FINANCIAL PLANNING ASSOCIATION
OF GREATER INDIANA**

PATRON SPONSORS

Central Indiana Community Foundation
Laserfiche
Life Settlement Advisors
The Coverdale Team

CORPORATE SPONSORS

American Century Investments
American Funds
Ameriprise Financial
Barnes & Thornburg, LLP
Bingham McHale, LLP
cfd Investments
Chubb Group of Insurance Companies
Claymore Securities, Inc.
Fund Evaluation Group
Jackson National Life Insurance
One America
Pacific Life Annuities & Mutual Funds
PIMCO Funds/Allianz Funds
Schwab Institutional
TD AMERITRADE Institutional

PROFESSIONAL AFFILIATE SPONSORS

Ash Brokerage
Eckhart & Company
John Hancock Financial
Midwest Mortgage Planners, Inc.
Trust Legacy, LLC
Upromise Investments, Inc.
Wealth Preservation Strategies, LLC

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		<p>Roxanne McGettigan 317-638-0402 roxmcgettigan@indy.rr.com</p>	<p>Sponsorship Manager</p>