



# **FPA Greater Rochester NY Partnership Opportunities**

**2010 - 2011**

**Please mail completed Partnership forms to:**

Financial Planning Association of Greater Rochester NY  
ATTN: Partnership Registration  
PO Box 302  
Spencerport, NY 14559-0302

If you would prefer to fax your form, our fax number is 877-836-6654. If you have questions, or need additional information, please feel free to contact us via email ([admin@nyfpa.org](mailto:admin@nyfpa.org)) or phone 585-410-1462. Thanks!

# Financial Planning Association of Greater Rochester NY Monthly Breakfast Meeting Sponsor

## Monthly Meeting Sponsor: \$600

Our Chapter holds monthly Breakfast Programs, where a Continuing Education topic is presented. Meeting Sponsors are offered the following benefits:

- Opportunity for a 10-minute presentation at a regularly scheduled chapter meeting.
- Meeting attendee roster.
- Listing on Chapter website.

*Please indicate which date you are interested in and complete the appropriate contract:*

\_\_\_ Wednesday, April 13, 2011

\_\_\_ Wednesday, May 11, 2011

## \_\_\_ Preferred Partner: \$1200

Combine your Breakfast Meeting Sponsorship with an Exhibit Booth at our Annual Symposium and save \$300! (If purchased separately, Breakfast Meeting Sponsorship is \$850 and a Symposium Exhibit booth is \$650). Benefits include:

- Symposium Exhibit Booth.
- One Monthly Breakfast Meeting Sponsorship during 2010-2011 Programming Year.
- Branding on all Symposium Marketing Materials.
- Full-page Advertisement in Symposium Program Book.
- Symposium Attendee Roster.
- Promotion on Chapter Website.
- Symposium Registration for Two Sponsor Representatives.

*Please note that there are a limited number of Sponsorships available. Please send appropriate contract and payment promptly to reserve your spot. Thank you!*

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

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

# Financial Planning Association of Greater Rochester NY Symposium: Thursday, June 16, 2011

*Please indicate which opportunity you are interested in and complete the appropriate contract:*

<p><b>___ Marquis Sponsor: \$2500</b></p> <ul style="list-style-type: none"> <li>• Opportunity for a 15-minute Presentation during Lunch at Symposium.</li> <li>• Premium Location Symposium Exhibit Booth.</li> <li>• Premium Branding on all Symposium Marketing Materials.</li> <li>• Full-page Advertisement in Symposium Program Book.</li> <li>• Symposium Attendee Roster.</li> <li>• Promotion on Chapter Website.</li> <li>• Symposium Registration for Two Sponsor Representatives.</li> </ul>	<p><b>___ Symposium Lunch Sponsor: \$1500</b></p> <ul style="list-style-type: none"> <li>• Opportunity for a 15-minute Presentation during Lunch at Symposium.</li> <li>• Full-page Advertisement in Symposium Program Book.</li> <li>• Symposium Attendee Roster.</li> <li>• Promotion on Chapter Website.</li> <li>• Symposium Registration for Two Sponsor Representatives.</li> </ul>
<p><b>___ Preferred Partner: \$1200</b></p> <ul style="list-style-type: none"> <li>• Symposium Exhibit Booth.</li> <li>• One Monthly Breakfast Meeting Sponsorship during 2010-2011 Programming Year.</li> <li>• Branding on all Symposium Marketing Materials.</li> <li>• Full-page Advertisement in Symposium Program Book.</li> <li>• Symposium Attendee Roster.</li> <li>• Promotion on Chapter Website.</li> <li>• Symposium Registration for Two Sponsor Representatives.</li> </ul>	<p><b>___ Symposium Snack Sponsor: \$1000</b></p> <ul style="list-style-type: none"> <li>• Premium Location Symposium Exhibit Booth.</li> <li>• Signage during Refreshment/Break Session.</li> <li>• Full-page Advertisement in Symposium Program Book.</li> <li>• Symposium Attendee Roster.</li> <li>• Promotion on Chapter Website.</li> <li>• Symposium Registration for Two Sponsor Representatives.</li> </ul>
<p><b>___ Symposium Exhibit Booth: \$650</b></p> <ul style="list-style-type: none"> <li>• Symposium Exhibit Booth.</li> <li>• Business Card Advertisement in Symposium Program Book.</li> <li>• Symposium Attendee Roster.</li> <li>• Promotion on Chapter Website.</li> <li>• Symposium Registration for Two Sponsor Representatives.</li> </ul>	<p><b>___ Symposium Advertiser</b> Print Advertisement in Symposium Program Book (black &amp; white).</p> <p>___ \$300 Inside Front or Outside Back Cover          ___ \$200 Inside Back Cover          ___ \$150 Full Page          ___ \$100 Half Page          ___ \$75 Quarter Page          ___ \$50 Business Card</p>

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Your Name \_\_\_\_\_ Company \_\_\_\_\_  
 Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Email \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_



## Chapter Profile

**The Financial Planning Association of Greater Rochester New York is the organization that brings together all the varying professions involved in the financial planning process in the Rochester, NY area.** We also have members in southern Canada and northeastern Pennsylvania. With market penetration far greater than many chapters with larger population, our membership currently numbers nearly 170.

**We are committed to providing the highest quality educational programs to help all our members keep current on technical and practice management topics and be better professionals.** We hold monthly meetings and an annual, day-long educational Symposium.

**Our meetings are well-attended.** Rochester meetings average about 50 attendees for the current season, meaning 29% of our membership regularly attends – a level of participation difficult to rival among other chapters across the country.

**Our members are active participants** in chapter activities. Nearly 90% have attended at least one chapter meeting during recent program years, and about 50% attended three or more meetings. A major portion of our members participate in some or all of our annual Symposium.

**Our members have wealthy clients.** A survey taken a few years ago at a chapter meeting with 110 members in attendance yielded the information that those present (not all of whom reported) had an aggregate of \$2.6 billion under management. The people present were about 1/3 of our total membership at that point, and represented all aspects of the industry. Many members who are not licensed to sell products work in close conjunction with other members who are appropriately licensed, to bring the best possible service to their high net worth clients.

**Our members are well-educated** and intellectually active. Nearly all of our practitioner members are college graduates; about 32% hold a master's degree or higher. Member surveys and attendance have shown that the Rochester audience in particular tends to prefer advanced level programming. The most commonly-heard complaint is that a program speaker underestimated the audience's level of background knowledge.

**Nearly all of our members hold one or more licenses and/or designations.** Over 66% of our members hold some kind of securities license. We have collected fairly complete Broker Dealer information, which is available to meeting sponsors with the attendee roster. About 64% of our members are life-licensed; over 55% hold the CFP® or ChFC designation. Over 50 members are attorneys or CPAs, or both; the majority of these have high net worth clients.

**Our members are entrepreneurial.** Nearly half of practitioner members work in offices of 10 or fewer employees, and many more in companies with 11 to 50 employees. They lean heavily on the FPA to keep them abreast of the constant changes taking place in their industry, and to supply them with the continuing education they need to maintain their various professional designations. Our chapter currently serves as a trusted provider of CE credit for CPAs, Certified Financial Planners, Certified Trust & Financial Advisors (Institute of Certified Bankers of the ABA), and PACE credit for Chartered Life Underwriters and Chartered Financial Consultants. We frequently sponsor NYS Insurance credit courses. We also offer NASD credit for Broker Dealers, and will apply for CLE credit (attorneys) when supplied with proper documentation in time. While not all programs qualify for credit for all designations, many of our members need CE credit for multiple designations, and appreciate any opportunity to satisfy several requirements at once.

**Our members are experienced.** With an average age of 49, and 51% of the members between the ages of 40 and 59, our members are far from new to the financial services industry. A majority of practitioners have been in the business for more than ten years, and many of the rest have come to their present situation from a related field.

**Our members have high expectations.** Aside from credit issues, our members look to the FPA for the **highest quality of instruction** in the industry. They appreciate speakers who do not take more than five minutes to “set the stage” or explain the rationale for their presentation. A frequent complaint is that “the speaker spent so much time on the basics that he never got to what the audience wanted to learn until the last five minutes.”

This audience **likes to be challenged** with new information, fresh ideas, or new insights on what they already know. If in doubt about where they are starting from, ask questions to get past their basic knowledge in a hurry. They are exhilarated whenever someone comes along to stretch their minds, or blow away their preconceived ideas.

A period of 15 minutes or so for Q&A at the end of the presentation is always appreciated. If the audience has been well engaged, they will join enthusiastically in discussion for that or more. [50 minutes total instruction time is required for credit.] Symposium workshops operate on a strict 60 minute time schedule, to assure adequate time to visit exhibitors during breaks between sessions.

**Our members use our website.** The chapter’s site at [www.nyfpa.org](http://www.nyfpa.org) draws active traffic from our members. Speaker outlines and/or handouts are posted to the site in .pdf format when available. This provides our members in distant locations at least some useful information from meetings they are unable to attend. Speakers who would like to be a resource to our members may make good use of this contact. Hotlinks to a speaker’s e-mail address and to his/her company’s website are also created with the speaker’s permission. Presenters interested in surveying the potential audience in advance of speaking are invited to do so by relaying any questions to the chapter office at least two weeks before the scheduled meeting.

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***We hope this profile of our members will be useful to you as you prepare to make a presentation to one of our meetings, or at our annual Symposium .***

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