



		Gold \$2,000	Silver \$1400
Partner Openings Available		10	unlimited
Featured partner at one chapter meeting (in-person), which includes: <ul style="list-style-type: none"> <li>• Five-minute presentation at meeting, power point optional</li> <li>• Logo and contact info on all programs and promotional material</li> <li>• Option to have handouts given to all attendees</li> <li>• Logo and contact info on "Walk-In Slideshow"</li> <li>• Logo and recognition extended to meeting partners if the meeting is a joint meeting</li> <li>• Recognition on Twitter the day of the Chapter Meeting, regardless of whether you have a Twitter account</li> </ul>		✓	
Free admission for partner <i>and 1 guest</i> at all chapter meetings (in-person) and introduction at all chapter meetings		✓	
Partner Spotlight in Chapter Email *2 times during month of being featured partner *Either a thumbnail of your promotional flyer <i>or</i> a short paragraph about your products/services, along with contact information (you provide promo information)		✓	
Free admission for partner at all chapter meetings (in-person) and introduction at all chapter meetings			✓
In-Person	Chapter Meeting – Sponsor Spotlight Opportunity to give a 5-minute sponsor spotlight and present on a topic, service or product of your choosing	✓	✓
Virtual	Option to host an educational webinar for FPA chapter members (4 webinars slots available in 2023). Open to all partners at an additional fee: Gold (\$250) or Silver (\$300)	✓	✓
Virtual	20 second (or shorter) video ad to be shown at beginning of chapter meetings. (Video recording apps such as Screencastify and more can be found online)	✓	✓
Logo and contact information listing on FPASV.org website		✓	✓
Email introducing our 2023 partners, scheduled no later than March 2023 (reaches approx. 1500 members and prospective members). Includes your logo and contact information		✓	✓
Regional newsletter listing (reaches approx. 1300 members)		✓	✓
Prominent recognition on chapter emails (reaches approx. 1500 members and prospective members)		✓	✓
Prominent recognition on monthly event calendar email sent to all FPA members in the Bay Area region (reaches approx. 1300 members)		✓	✓
Timely Topics: Promotion of partner events, whitepapers, articles, online tools on FPASV website, chapter email and Twitter. (Send to <a href="mailto:execdirector@fpasv.org">execdirector@fpasv.org</a> )		✓	✓
25% discount on Regional Newsletter Advertising (rate sheet included)		✓	✓
Chapter membership mailing addresses in PDF format based on the 5160 Avery standard mailing labels or in Excel format Note: We are not allowed to share member email addresses		✓	✓
Product literature or display at all in-person chapter meetings		✓	✓
Recognition as a partner on the table "tent cards" and "Walk-in Slideshow" at all in-person chapter meetings		✓	✓

Please note: Partnership with FPA of Silicon Valley is separate from FPA Membership. We encourage you to join FPA and enjoy the additional benefits of chapter membership. [Click here](#) for more information or to join. If you are not currently a member of FPA, be sure to choose Silicon Valley as your chapter.



# Reservation for Partnership

2024

Thank you for supporting our chapter.

Please complete the sections below. Your reservation must accompany or precede payment. Confirm your commitment by submitting payment as soon as possible. Partnership priority, the month you are the featured partner (Gold only), and the webinar option are based on when your payment is received (first come, first served).

**If paying by credit card, please complete your reservation form and payment online:**  
<https://www.fpasv.org/annual-partners>. **You do not need to complete this form.**

**If paying by check**, choose one of the following: **Partnership Level**  Gold (\$2,000)  Silver (\$1,400)

- Complete your reservation online above and stop at payment page.
- Complete this form and email it to Tonia Forbus at [execdirector@fpasv.org](mailto:execdirector@fpasv.org)
- Complete this form and mail it to the address below with your payment.

Make checks payable to FPA of Silicon Valley. Please remit checks to:

FPA of Silicon Valley  
P.O. Box 3530  
Santa Clara, CA 95055

Please provide the following information:

1. Company Name: \_\_\_\_\_

2. How would you like your company to be listed on marketing materials? (*Same as above OR please fill in*):  
\_\_\_\_\_

3. Company Website Address: \_\_\_\_\_

4. Twitter handles (rep and company): \_\_\_\_\_

5. Company Representative and Contact Info for Marketing:

Name: \_\_\_\_\_  
Local Mailing Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Email Address: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_

6. Where would you like to receive your Regional Newsletter? (*Same as above OR please fill in*)

Name: \_\_\_\_\_  
Local Mailing Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Email Address: \_\_\_\_\_

**Next Page:** Choose your preferred meetings (Gold partners) and/or your Webinar Dates. Complete your Invoice.

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2024 Chapter Meeting Schedule

In-person chapter meetings plan to be held on the 2nd Thursday of every month from 11:30 am – 1:30 pm (except May [NorCal Conference] and August [Far West Roundup]).

Gold Partners: Please indicate, in order of preference, which four meeting dates you would like to be the featured partner of the month. \*Chosen months are not guaranteed as they are assigned on a first-come, first-served basis.

Form with checkboxes for meeting dates: January 11, February 8, March 14, April 11, May - No Meeting, June 13, July 11, August - No Meeting, September 12, October 10, November 14, December 12 (Holiday Party)

Webinar Option Gold (\$250) Silver (\$300)

Lead a one-hour educational webinar for our chapter members! Webinars should include a minimum of 50 minutes of content considered educational per CFP Board requirements. These webinars should not be promotional in nature, but partners will have time to include information about services and products. FPA of Silicon Valley will provide the platform for the webinar (Zoom), check attendance and complete CFP CE application/submission. If the partner hosting the webinar has these capabilities, we can work with those.

Webinars are offered on a first-come, first-served basis. Once all reservations are received, you will be contacted for program information. Note that scheduling of dates can be flexible.

Please list date preference by a number in order on 3rd Fridays of the month from Noon-1 pm or arranged date/time during the month:

Form with checkboxes for quarterly preferences: Q1 (March 15), Q2 (July 19), Q3 (September 20), Q4 (November 15)

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FINANCIAL  
PLANNING  
ASSOCIATION  
SILICON VALLEY

Reservation for Partnership

2024

Thank you for supporting our chapter.

**Invoice**

**Total** \$ \_\_\_\_\_

**Thank you for supporting FPA of Silicon Valley!**

EIN: 77-0381724

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