

2016 Partnership Program



OF MASSACHUSETTS

Reach FPA™ MA's
1,000 members.

Who are our members?

40% of our membership
are RIA's with over
110 Billion AUM

41% of our members are
Registered Reps,
representing 89 broker
dealers

80% of our membership
are CFP®'s with an average
of 11 years of membership
in FPA

Platinum Partner: \$6,500

This all inclusive Platinum Partner Program ensures your company year-long exposure to the Massachusetts financial planning community. You will network with the leaders of one of the most progressive and innovative local groups of financial professionals. The FPA™ MA is the second largest chapter in the country and the largest chapter in the Northeast.

Educate

- Speaker* for a focus group, webinar, quarterly or annual meeting
- Co-host a presentation at the free member CE event
- Up to 4 dedicated messages/email via FPA™ MA bulletin
- Digital Partner 365™: All members will have access to your posted material. Includes member analytics at all meetings
- Rebroadcast your educational video/presentation on our website

Engage

- Preferential exhibitor space at Annual Conference and exhibitor space at three Half Day Meetings
- Meeting attendee list (pre and post)
- Attendance for two representatives at all meetings
- Membership listing
- Special partner breakout session at Annual Conference – Meet one-on-one with advisors
- Two non member guest passes **

Recognize

- Logo on signage at every meeting
- Web page hyperlink and FPA™ MA rotating banner
- Sponsor short at every event
- Sponsor tag on our Bloomberg Radio spots

* Speakers and topics must be approved by the program committee

** Half Day meeting



2016 Meeting Dates and Locations

February 5
Westborough
Doubletree: Half Day

May 5 & 6
Annual Conference
Babson Executive
Center in Wellesley

October 7
Granite Links Quincy:
Half Day

December 2
Danvers
Doubletree:
Half Day

Technology Partner: \$4,000

Technology Partners are software or technology providers for the financial services industry. Technology Partners must provide a discount on services to our members.

Educate

- Speaker* for a focus group, webinar, quarterly or annual meeting
- Digital Access: All members will have access to partner posted material for all meetings (see full benefit under Digital Partner)
- Rebroadcast your educational video/presentation on our website

Engage

- Exhibitor space at Annual Conference and exhibitor space at three Half Day Meetings
- Meeting attendee list (pre and post)
- Attendance for two representatives at all meetings
- Membership listing

Recognize

- Logo on signage at every meeting

* Speakers and topics must be approved by the program committee

Digital Partner 365™: \$2,500

Digital Partner 365™ program – a dedicated channel that directly connects you with our chapter members year round. Last year we introduced our mobile solution (ConferenceAdit) enabling every event attendee seamless access to your content coupled with aggregate event analytics. Now with our Partner program we are taking this engagement to the next level by extending that seamless reach to all of our members 365 days a year This includes attendance for one at our Half Day Meetings.

Half Day: \$1,000

Engage

- Exhibitor space at **one** of three Half Day Meetings
- Meeting attendee list (pre and post)
- Attendance for two representatives

Non-Profit: \$500

Engage

- Exhibitor space at three Half Day Meetings and the Annual Conference
- Meeting attendee list (pre and post)
- Attendance for two representatives

2016 Annual Conference Partnership Opportunities

Opening Night Reception Partner: \$5,500

- Includes signage
- Full day conference exhibit
- Pre & post attendee list
- Ability to post to FPA™ MA Digital access
- One email/link via FPA™ MA bulletin
- Attendance for four representatives
- 10 minute sponsor short at reception

Exhibit at the Annual Conference: \$4,000

- Full day conference exhibit
- Pre & post attendee list
- Ability to post to FPA™ MA Digital access
- Attendance for two representatives

Badge: \$2,500

- Custom lanyards with your logo
- Attendance for one representative

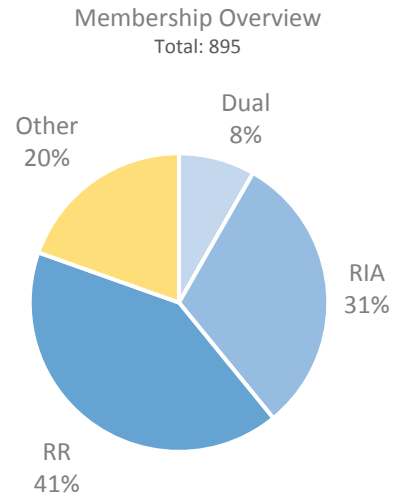
Bag Sponsor: \$2,500

- Custom Bag with your logo
- Attendance for one representative

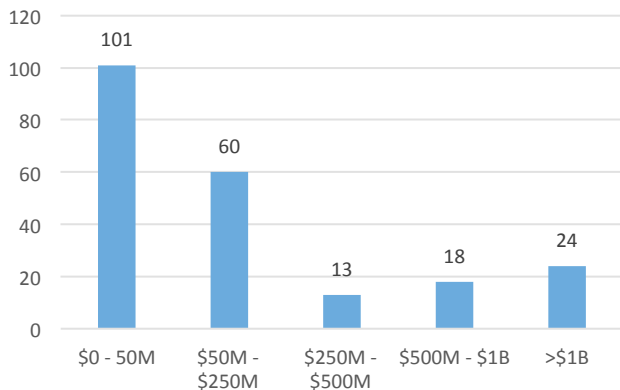
Quick Facts

The Overall Membership

- 80% of the membership are actively affiliated with a Registered Investment Adviser (RIA) and/or Broker/Dealer
- The non-registered members are affiliated with universities, banks, law and CPA firms, consultants and other stakeholders in the financial services community.



Member RIA Firms By Number
Total: 216



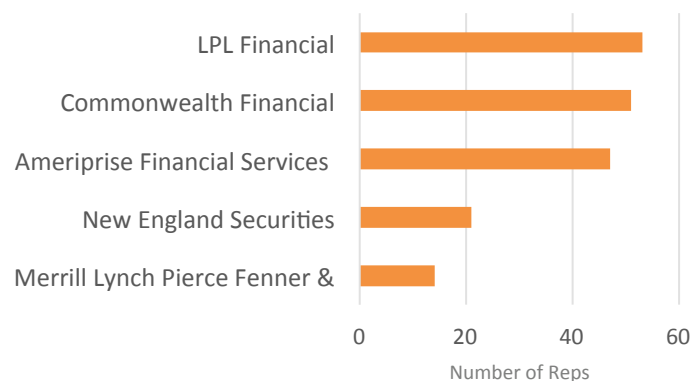
About the Registered Representative Community

- 370 or 41% members are solely affiliated with B/Ds.
- Of that number 90% are affiliated with Independent B/Ds.

About RIA and “Dual” Members

- 276 members or 31% were affiliated with RIAs.
- There are 216 RIA firms with \$130B under management.
- An additional 8% of the members are affiliated with an RIA and Broker/Dealer (“Dually Registered”)

Top Five Independent Broker/Dealers



Sources: FPA-MA, MeridianIQ and AdvisorAdit research

Please contact Kristin Beane at admin@fpama.org or call 508-839-2900 (855-54-FPAMA)
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