

Dear FPA Houston Corporate Partners:

**RE: FPA Houston – 2010 Corporate Partnership Program**

On behalf of the FPA of Houston, I would like to issue you a special invitation to the FPA Houston Corporate Partner program for 2010. As you are aware, 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.

We will continue to offer the **"Double Platinum"** level which originated in 2009 and was well received. This is the best value and includes the benefit of your company having a 50 minute speaking session at the 2010 FPA Houston Financial Planning Symposium. *Details can be found on page 2 of this package.*

Our Corporate Partner program is an exclusive program, structured to allow only a few select partners representing a cross section of the industry to participate at any given time. This invitation is extended to no more than a few partners in your business category.

Your partnership with the FPA Houston chapter will provide you with a wide range of benefits, giving you access to our members in every area of their membership life, including our symposium, chapter meetings, mailings, web site, and much more. Review the attached *"Summary of Partnership Benefits"* for the specifics.

**Summary of Partnership Benefits** – Please review this document and keep it for your records.

- **Letter of Agreement** – Please review, complete, sign and copy this document for your records.
- \* **Benefit Selection Sheet** – Please review, complete, and copy this document for your records.
- **Deadlines & Specs** – Please review this document and keep it for your records.
- \* **Annual Invoice** – Please review and copy this document for your records.
- **Calendar of Events** – You may check our website at any time [www.fpahouston.org](http://www.fpahouston.org) for updates to the Calendar of Events.

To begin enjoying the benefits of Corporate Partnership, please return the original documents marked with an asterisk (\*), along with your payment to the address below.

Again, thank you for your consideration and support. Please feel free to contact me with any questions relating to your partnership (713-993-4234 or [tara.bueno@stephens.com](mailto:tara.bueno@stephens.com)).

Sincerely,

Tara Bueno, AAMS®  
FPA Houston Director of Corporate Partnerships

## Summary of Partnership Benefits

The Platinum and Gold packages offer you an excellent opportunity to be a valued partner of our organization and to reap the rewards of establishing a strong relationship with the premier financial planning organization in the state and one of the top FPA chapters in the country. We have received the Gold Award since inception of the FPA, the highest award a chapter can receive for seven consecutive years.

**\* 2010 – DOUBLE PLATINUM LEVEL**

In addition to the benefits listed under Platinum below DOUBLE PLATINUM Partners will receive a guaranteed breakout session speaker spot (50 minutes) at the 2010 FPA Houston Financial Planning Symposium as well as all other benefits. This opportunity is only available to THREE companies.

*Double Platinum \$5500	Platinum Partner \$4000	Gold Partner \$3000	Silver Partner \$2000
<p><u>In addition to the Gold and Silver benefits</u>, you will receive:</p> <p>Platinum Partners will have a distinct advantage over their competition.</p> <ul style="list-style-type: none"> <li>• A quarterly FPA Houston chapter demographic report and stats on our 650 members. A great tool for targeting your prospective new clients.</li> <li>• A 10 Minute presentation, display table, and attendee list at one monthly meeting.</li> <li>• One featured article in quarterly newsletter.</li> <li>• Special recognition at our annual symposium.</li> <li>• Exhibit table at 2 chapter meetings of your choice.</li> <li>• Send one email blast to our membership.</li> <li>• Signage at the golf tournament.</li> <li>• One full page or two half page ads in the chapter's quarterly newsletter per year. (Platinum only)</li> </ul> <p>Current Corporate Partners will receive a 20% discount when renewing the Platinum Package. Deadline for discounted renewal – Jan 31, 2010</p>	<p><u>In addition, to the Silver benefits</u>, you will receive:</p> <ul style="list-style-type: none"> <li>• Minute to "shine" at the 2010 FPA Houston Symposium</li> <li>• A quarterly FPA Houston chapter demographic report and stats on our 650 members. A great tool for targeting your prospective new clients.</li> <li>• A display booth at the June Practice Management Symposium.</li> <li>• One half page ad in the FPA quarterly newsletter per year. (Gold only)</li> <li>• One set of membership mailing labels.</li> <li>• A copy of the FPA of Houston member profile (planners' names, addresses and specialties.)</li> <li>• Lead a Case Study Group (upon availability).</li> </ul> <p>Current Corporate Partners will receive a 10% discount when renewing the Gold Package. Deadline for discounted renewal – Jan 31, 2010</p>	<ul style="list-style-type: none"> <li>• FPA of Houston Season Ticket for two representatives to all regular monthly Chapter meetings; anticipated attendance of 170-200.</li> <li>• Company name, logo, website link, and representative's name and contact info posted to our website.</li> <li>• Exhibit space at our annual FPA of Houston Financial Planning Symposium; includes electronic spreadsheet of attendees.</li> <li>• A copy of our exclusive FPA Houston Corporate Partnership newsletter which alerts you to all upcoming events, sponsor benefits, special exclusive opportunities, etc.</li> </ul>	

## Letter of Agreement for FPA Houston Corporate Sponsors

The undersigned party (herein after "Partner") hereby applies to become a Corporate Partner of the FPA of Houston 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 Houston chapter 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 page 2 for a full list of benefits for Platinum, Gold and Silver levels.

All sponsorship levels include exhibit space at the FPA Houston Financial Planning Symposium.

### **Responsibilities of Partner will include:**

- Payment of annual Platinum Corporate Partner fee (based on level selected). *Renewing Partners will be entitled to a prompt payment discount for payment of fees within 31 days of annual contract date.*
- 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).
- Provide booth materials and set up at the annual FPA Houston Financial Planning Symposium.
- Maintain good corporate citizenship and standing.

### **FPA Houston 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...**

## Letter of Agreement for FPA Houston Corporate Sponsors

### Page Two

Partner agrees to the above terms, and hereby applies for a partnership with the FPA-Houston in the Program on the \_\_\_\_\_ day of \_\_\_\_\_, 200\_\_.

Signed by:

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Printed Name Company Name

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

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

\_\_\_\_\_  
E-mail

\_\_\_\_\_  
Website (to be linked to FPA Houston website)

\* If the information to be listed on the FPA Houston 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 Houston Double Platinum/Platinum Sponsor Benefit Selection Sheet

Will you require exhibit space at the FPA Houston Financial Planning Symposium?

Yes       No

Select a date for your 10 minute sponsor spotlight at a FPA Houston chapter meeting from the following 2010 dates. Dates are on a first come first serve basis – please add “1” to your first choice and “2” to your second choice. **DATE SELECTION IS DUE NO LATER THAN JAN. 31<sup>ST</sup>. AFTER JAN. 31<sup>ST</sup> FPA HOUSTON WILL ASSIGN DATES AUTOMATICALLY.**

Jan 4 \_\_\_      Feb 1 \_\_\_      Mar 1 \_\_\_      May 3 \_\_\_  
Jun 4 \_\_\_      Aug 2 \_\_\_      Nov 1 \_\_\_      Dec 7 \_\_\_

Display booth at the annual FPA Houston Practice Management Seminar on June 4, 2010

Yes       No       Undecided

I would like to lead a FPA Houston Case Study in 2010.

Contact Kurt Box [kurt@cypressadvisory.com](mailto:kurt@cypressadvisory.com) or [execdir@fpahouston.org](mailto:execdir@fpahouston.org) for details and to schedule

Yes       No       Undecided

FPA of Houston Foundation Golf Tournament

Yes, I will attend and would like signage at the event  
 No, I will not attend, but do request signage at the event       Undecided

### **Platinum Partners also receive:**

- One blast emails per year
- One full page or two half page ads in the FPA Houston newsletter
- One feature article in the FPA Houston newsletter
- Chapter meeting exhibit space
- Signage at the FPA Houston Golf Tournament
- Chapter demographic report & membership list, sent out quarterly
- FPA Houston Season Ticket for 2 representatives to all chapter meetings

See the Advertising Sheet below for details on blast emails, newsletter advertising and newsletter article specs as well as deadlines for 2010.

**Your contact for benefit requests or scheduling is Melisa Hall**  
**[execdir@fpahouston.org](mailto:execdir@fpahouston.org) / 713-518-1785**

## FPA Houston Gold Sponsor Benefit Selection Sheet

Will you require exhibit space at the FPA Houston Financial Planning Symposium?

Yes       No

Display booth at the annual FPA Houston Practice Management Seminar on June 4, 2010

Yes       No       Undecided

I would like to lead a FPA Houston Case Study in 2010.

Contact Kurt Box [kurt@cypressadvisory.com](mailto:kurt@cypressadvisory.com) or [execdir@fpahouston.org](mailto:execdir@fpahouston.org) for details and to schedule

Yes       No       Undecided

### **Gold Partners also receive:**

- One half page ads in the FPA Houston newsletter
- Chapter demographic report & membership list, sent out quarterly
- FPA Houston Season Ticket for 2 representatives to all chapter meetings

## FPA Houston Silver Sponsor Benefit Selection Sheet

Will you require exhibit space at the FPA Houston Financial Planning Symposium?

Yes       No

### **Silver Partners also receive:**

- FPA Houston Season Ticket for 2 representatives to all chapter meetings

**Your contact for benefit requests or scheduling is Melisa Hall**

[execdir@fpahouston.org](mailto:execdir@fpahouston.org) / 713-518-1785

## Deadlines & Specs for Emails, Newsletter Advertising & Articles

### **Broadcast E-Mails to FPA Houston Membership**

Platinum Partners – once per year

The email should be sent to the FPA Houston office ([execdir@fpahouston.org](mailto:execdir@fpahouston.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**

Platinum Partners – 2 half page ads or one full page ad per year

Gold Partners – 1 half page ad per year

- Size of ad: Half page 5 ½" x 7 ½" / Full page 7 ½" x 9" (color or B&W)
- Format of ad: JPG or PDF
- Email ad in print ready format to: [execdir@fpahouston.org](mailto:execdir@fpahouston.org)

### **Newsletter Feature Article Credit**

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

### **2010 Newsletter Deadlines:**

Qtr 1 Newsletter	Deadline: February 10, 2010
Qtr 2 Newsletter	Deadline: May 10, 2010
Qtr 3 Newsletter	Deadline: August 1, 2010
Qtr 4 Newsletter	Deadline: November 10, 2010

## Annual Invoice

Invoice Number: \_\_\_\_\_ Invoice Date: \_\_\_\_\_  
 Customer Identification: \_\_\_\_\_

**Bill To:**

Name \_\_\_\_\_  
 Contact Person \_\_\_\_\_  
 Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_

Rep	Contract Starting Date	Contract Ending Date	Terms
Melisa Hall			Net due at contract signing.

Select One

Option	Description	Unit Price	*Discount	Total	
<input type="checkbox"/>	<b>NEW DOUBLE PLATINUM</b> Corporate Partner	5500	0	5500	
<input type="checkbox"/>	<b>NEW PLATINUM</b> Corporate Partner	4000	0	4000	
<input type="checkbox"/>	<b>NEW GOLD</b> Corporate Partnership	3000	0	3000	
<input type="checkbox"/>	<b>NEW SILVER</b> Corporate Partnership	2000	0	2000	
*Discount only applies to RENEWING Platinum & Gold sponsors who renew no later than January 31, 2010. There is no discount given for the double platinum or silver level.					
<input type="checkbox"/>	<b>RENEWING DOUBLE PLATINUM</b> Corporate Partner	5500	0	5500	
<input type="checkbox"/>	<b>RENEWING PLATINUM</b> Corporate Partner	4000	<b>(-\$800)</b>	3200	
<input type="checkbox"/>	<b>RENEWING GOLD</b> Corporate Partnership	3000	<b>(-\$300)</b>	2700	
<input type="checkbox"/>	<b>RENEWING SILVER</b> Corporate Partnership	2000	0	2000	
				Subtotal	
				Paid	
				Balance Due	

Thank you for your participation in our Corporate Partnership Program. We look forward to working with you during the coming year.

*Tara Bueno*