

2010 FPA Houston Financial Planning Symposium Sponsor Information & Exhibitor Service Kit

Westin Galleria Houston • 5060 West Alabama St. • Houston, TX

September 23, 2010



The 2010 FPA Houston Financial Planning Symposium will be held September 23, 2010 at the Westin Galleria Hotel in Houston, Texas. Our goal is to target the financial planning professionals interested in learning the latest financial planning strategies, learn from experts, share with colleagues and build their knowledge.

To become a 2010 exhibitor complete and return pages 4 & 5 to fax number 972-747-0409

WHAT-WHERE-WHEN

The 2010 FPA Houston Financial Planning Symposium will be held at the Westin Galleria Hotel on Thursday, September 23, 2010. The event hours are 7:00 a.m. to 4:30 p.m.

SPONSORSHIP BENEFITS

Sponsorship at the FPA Houston Financial Planning Symposium includes a draped table, electronic spreadsheet of attendees and reserved seats for two representatives at meals with the opportunity to host your table and meet attendees one on one.

In addition to exposure at the conference, your company will receive the following benefits as an exhibitor:

- Listing in the FPA Houston chapter newsletter as a supporting sponsor (distributed to 900+)
- Listing in the event program schedule
- Promotion and logo placement on the FPA Houston website (www.fpahouston.org)
- Advertisement in conference material and signage
- Complimentary conference materials and handouts
- Two complimentary conference registrations, including any CE sessions and credits
- All meals and refreshments (continental breakfast, lunch and breaks)
- Name recognition to over 2000 financial professionals
- Post conference attendee mailing list

BOOTH PLACEMENT

By limiting the number of sponsors to 30, we hope to give you an excellent opportunity to develop many profitable relationships with FPA members and other financial professional attendees. To maximize your exposure to attendees, booths will be arranged surrounding the main foyer, directly outside of the meeting rooms. This arrangement will allow conversations to be held throughout the day during various breaks, as well as the opportunity for you to participate in the sessions. Booth placement will be given priority based on your sponsorship level (e.g. Platinum, Gold, Silver and Symposium Sponsors).

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EXHIBITOR INDEMNIFICATION CLAUSE

Exhibitor assumes the entire responsibility and liability for losses, damages, and claims arising out of injury to persons or damage to exhibitor's displays, equipment, or other property brought upon the premises of the hotel and agrees to indemnify, defend and hold harmless the FPA, the Hilton, and its owners, servants, agents, and employees against all claims or expenses for such losses, including reasonable attorney's fees, arising out of the use of the Hotel premises excluding any liability caused by the negligence of the Group or the Hotel or its owner servants, agents, and employees.

The sponsor understands that neither the FPA nor the Westin Hotel maintains insurance covering the exhibitor's property or list revenue and it is the sole responsibility of the exhibitor to obtain such insurance.

EXHIBITOR BOOTHS – SET UP & TAKE DOWN

All sponsors will have one 3' x 6' draped table, two chairs, a company identification sign, and general security. Sponsors may bring in displays as long as it fits inside their booth. We have asked that representatives be allowed to set up their booth on Wednesday evening, September 22nd after 7:00 p.m. or early Thursday morning. Set up must be completed by 7:00 am on Thursday, September 23rd. You are expected to represent your booth during the entire conference.



PACKAGES

All incoming packages should be addressed to Westin Galleria Houston and will not be accepted earlier than 72 business hours prior to Thursday, September 23. Please number **ALL** boxes. All outgoing packages must be packed and clearly labeled prior to shipping.

All packages and shipments must have the following information

Westin Galleria Houston
c/o FPA Houston Symposium – Sept 23
5060 West Alabama St. - Houston, TX 77056

Attn: **Add your company name here**
Hold for FPA Houston – September 23, 2010

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AUDIO/VISUAL and SPECIAL BOOTH NEEDS



You may order items for your booth such as an electrical hookup, telephone, or audio-visual equipment by completing the Order Form (see separate attachment). Costs for these special needs are listed on the form and are the responsibility of the exhibitor. Payment for these requests must be made prior to the event via the form, directly to the Westin Galleria. If you need an additional copy of this form please send a request to execdir@fpahouston.org.

CANCELLATION/REFUND POLICY

There are no refunds for cancellation.

ATTIRE

The dress code for the event is business/business casual. Please keep in mind that Texas during the spring can be very warm. However, we do advise that you bring a sweater to the conference since meeting rooms can be very cold at times.

CONFERENCE EVALUATIONS

Prior to, during and after the conference we strongly encourage you to give your opinions and input on the event as this gives us great direction when planning future conferences. We strive to make this event an excellent opportunity for you and for our members – it is important that you take a few minutes to share your thoughts. We will also be providing you with details on the annual Corporate Partnership packages which will be available for 2010, of which will include a package allowing partners to participate in a variety of events and activities throughout the year with the members of FPA Houston. If you would like to meet with a Director or Representative one-on-one please schedule an appointment with Melisa Hall at the registration desk.

QUESTIONS

Please contact Melisa Hall, Executive Director, at 713-518-1785, email address: execdir@fpahouston.org

PAYMENTS AND MAILING ADDRESS

We accept payment via credit card or check. Please make checks payable to FPA Houston. Return all forms and payments to: FPA Houston, P.O. Box 261690, Plano, TX 75026.

UP-TO-THE-MINUTE INFORMATION

Please check our website at www.fpahouston.org for up to the minute information

FPA Houston Financial Planning Symposium BOOTH CONFIRMATION FORM

Company Name: _____ Phone: _____

Attending Exhibitor Representatives: (Limit 2)
Clearly write their names and email addresses:

Name	Email
1.	
2.	

Additionally, you may also email the above names to execdir@fpahouston.org, along with the way you would like your company name to read on all conference material

Checklist:

- Exhibitor space will include one table, two chairs, and draping. Exhibitors may bring in displays as long as it will fit inside their booth area. Exhibits must be set up by Registration Opening (September 23 by 7:00 AM). Exhibits must be dismantled by 5:00 pm the day of the event.
- Sponsorship Fee of \$1500 is due by September 1;** this payment is **required** to hold your booth. **After September 1 the cost will increase to \$1750.** Please make checks payable to FPA Houston. Booths will not be held after September 20th without payment.
- Technical Needs: Electricity and phone access are available at an additional cost. Additional information and pricing on Technical Needs will be sent under a separate attachment.
- Your company name will be printed as shown above unless indicated differently on the following page:

Additional FPA Partnership Opportunities:

- Tote Bag Sponsorship \$1,000
- Event Folder/Material Sponsorship \$500
- Annual Corporate Partnership (2010) * Cost Varies
- Additional company representative \$150 each

* For more details on these additional partnership opportunities, call Melisa Hall, 713.518.1785 or email execdir@fpahouston.org

Contact Melisa Hall at execdir@fpahouston.org for details on the above sponsorship opportunities.

2010 FPA Houston Financial Planning Symposium INVOICE

Exhibitor Information:

Company Name _____

Main Contact Name & Phone _____

Main Contact Email _____
(Main Contact should be the person to contact regarding conference material, information, etc)

Contact Name to be listed on website _____

Mailing Address _____

City, State, Zip _____

Website (link will be used on FPA Houston website) _www. _____

Phone No. _____ E-Mail _____
(The above phone and email address will be listed on the FPA website along with your logo and web link)

Return the Booth Conf. Form, Invoice and payment to:

**FPA Houston
c/o Melisa Hall
P.O. Box 261690
Plano, TX 75026**

**Or via fax: 972-747-0409
(Credit Card Information must be included if sent by fax)**

Qty	Description	Unit Price	TOTAL
1	2010 FPA Houston Financial Planning Symposium Sponsorship (Exhibit Space)	\$1500.00	\$1500.00
Sub Total			\$1500.00
TOTAL			\$1500.00

Payment Details (check one)

Enclosed Check (Check # _____)

Credit Card Select One: AMX VISA MasterCard

Name on card _____ Signature _____
(Please Print)

CC # _____ Exp Date _____

Security Code _____



Lodging

- Participants and exhibitors are responsible for making their own lodging arrangements.
- All reservations, changes and cancellations can be made by contacting the Westin Galleria Hotel directly at 713-960-8100.
- The nightly room rate for these dates starts at \$259/single or double, plus parking and applicable taxes (rates may vary).
- Check-in is after 3:00 p.m. and check-out is noon.
- You will receive a confirmation from the hotel after making your reservation. We recommend that you arrange for your hotel accommodations as soon as possible to ensure availability.

WESTIN
HOTELS & RESORTS

2010 FPA Houston Financial Planning Symposium FREQUENTLY ASKED QUESTIONS

Q: What is FPA?

A: Financial Planning Association; the largest, strongest, and most respected financial planning industry organization in the world with approximately 28,000 members – with over 600 in our Houston Chapter.

Q: Who else is exhibiting at the 2010 FPA Houston Symposium?

A: We plan to have approximately 30 exhibitors participating, including our annual Corporate Partners.

Q: How many attendees are expected?

A: Approximately 250-275 attendees are expected. Our goal is to focus on the entire financial planning community which includes Financial Planner's, Insurance Professionals, Investment Advisors, CPA's & Attorneys.

Q: Can I bring extra representatives? How many should I bring?

A: Attendance by two representatives is included as part of your exhibit fee. Due to the large number of attendees, it is recommended that you have two individuals at the booth throughout the day. ***Extra representatives are permitted for an additional \$150 each.***

Q: Do I have to stay for the whole conference?

A: Yes. A representative must be at your exhibit space during all posted exhibit hours. Take down is allowed after 4:00 pm on September 23.

Q: Can I attend the sessions and meals?

A: Yes, an agenda will be provided. To acquire a better understanding of current trends in the financial planning profession, we encourage you to participate in as many sessions as you wish.

Q: What is included in the exhibit fee?

A: The 2010 FPA Houston Symposium fee of \$1500 includes an exhibit table along with conference material and handouts, recognition and signage, access to up to all attendees, and participation by two exhibit representatives at the education sessions and meals.

Q: When can I set up and tear down?

A: Set up time is **tentatively scheduled** for Wednesday (September 22) evening after 7:00 p.m. or Thursday morning. The conference ends at 4:30 pm on Thursday, September 23. You may not tear down before 4:00 pm that day. **PLEASE DOUBLE-CHECK: SET UP TIME MAY CHANGE.**

Q: How much literature should I bring?

A: Bring enough materials for approximately 250-300 attendees.

2010 FPA Houston Financial Planning Symposium FREQUENTLY ASKED QUESTIONS CONTINUED

Q: Where can I ship my booth and conference handouts?

A: All incoming packages should be addressed to Westin Galleria Houston and will not be accepted earlier than 72 business hours prior to Thursday, September 23. Please number ALL boxes. All outgoing packages must be packed and clearly labeled prior to shipping.

All packages and shipments must have the following information:

Houston Westin Galleria Houston
C/O FPA Houston Symposium – Sept. 23
5060 W. Alabama St., Houston, TX 77056

Q: How can I decorate my exhibit space? What can I do or not do?

A: Your exhibit space is limited only to your imagination. Please keep liability issues in mind when deciding on your decorations. Storage of literature and catalogs must be under or on the provided table. Table cloths with company logos are permitted. No items may exceed into the aisles.

Q: When are exhibitor hours?

A: Thursday, September 23, 7:00 a.m. – 4:00 p.m.

Q: What is the dress code?

A: Business/business casual.

Q: What is the FPA refund policy?

A: There are no refunds for cancellation.

Q: Where should I stay?

A: We suggest the Westin Galleria Houston. Lodging is the responsibility of the exhibitor. You can contact the Westin Galleria directly at 713-960-8100 or online at www.Westin.com. Check with the hotel for current rates and specials.

Q: Who do I contact if I have additional questions?

A: Contact Melisa Hall, FPA Houston Executive Director
Phone: 713-518-1785
E-mail: execdir@fpahouston.org





Advertise

As a reminder, please send us your one page advertisement that you would like placed in each attendee's notebook no later than [September 1st](#).

- You will need to provide [300](#) copies
- Black & white OR color (your choice)
- Single or double sided (your choice)
- Paper can be matte, glossy and/or colored
- Graphics and/or verbiage on ad (your choice).

All advertisements **must reach us by [September 1st](#)** or we will not be able to use them due to the fact that we are using a third party to assemble the binders/folders and this is the deadline they have given us.

[No exceptions can be made on the deadline.](#)

These will need to be shipped to our physical address as follows:

Melisa Hall
c/o FPA Houston
15114 Mountain Creek Trl.
Frisco, TX 75035



Deadline: September 1 at 5:00 p.m.