2023 Partner Program

Reach our nearly 1000 Members through a year-long partnership with FPA New England, the largest chapter in the country!

500+
member firms represented

40%
of our membership are RIAs with over 320 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

FINANCIAL PLANNING ASSOCIATION
NEW ENGLAND

Platinum Partnership: $6,500

- Presenter at Free CE days – August 1 & 2 (virtual)
- Exhibit space at all four half-day meetings*
- Up to 4 webinars
- Up to 2 dedicated messages and emails
- Promote partner content
- Meeting attendee lists
- Membership Listing
- Web page hyperlink/separate individual page for each partner

Technology Partner: $4,000

- Presenter at Free CE day (virtual)
- Exhibit space at all four half-day meetings*
- Up to 4 webinars
- Meeting attendee list
- Membership listing
- Web page hyperlink
- Provide a discount for members

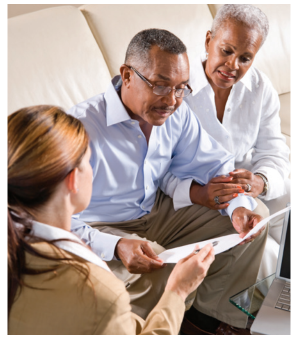
Non-Profit Platinum Partner: $3,500

- Presenter at Free CE day (virtual)
- Exhibit space at all four half-day meetings*
- Webinar/Virtual presentation
- Dedicated email to membership
- Meeting attendee lists
- Membership Listing

* Talks are scheduled to be in person.

Maine • Massachusetts • New Hampshire • Vermont

Contact admin@fpama.org to sign up!



Ala Carte Opportunities

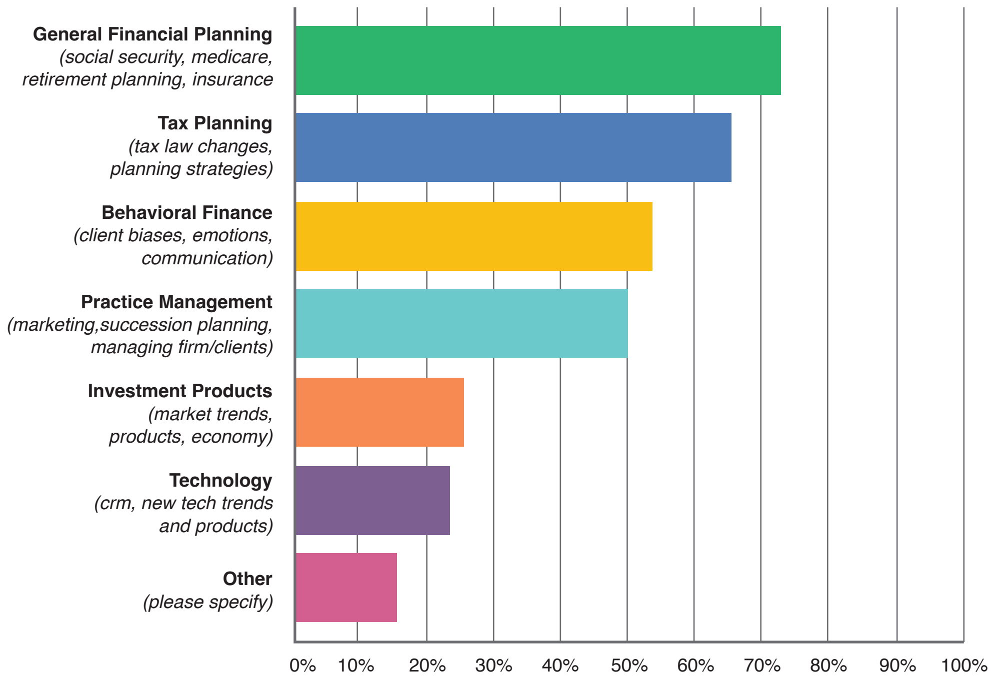
Wicked Good Half-Day Talks: $1,500

- **March 31, 2023** at the Verve, Natick, MA
- **May 18, 2023** at the Bedford Village Inn, Bedford, NH
- **September 13, 2023** at MFS Offices, Boston, MA
- **October 5, 2023** at the York Harbor Inn, York, ME

Webinars: $1,000

- One hour webinar
- Attendee list
- CE processing

Initial Member Survey Results on Topics



ANSWER CHOICES	RESPONSES	
General Financial Planning (social security, medicare, retirement planning, insurance	71.88%	23
Tax Planning (tax law changes, planning strategies)	65.63%	21
Behavioral Finance (client biases, emotions, communication)	53.13%	17
Practice Management (marketing, succession planning, managing firm/clients)	50.00%	16
Investment Products (market trends, products, economy)	25.00%	8
Technology (crm, new tech trends and products)	21.88%	7
Other (please specify)	15.63%	5
Total Respondents		

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