



FPA

FINANCIAL
PLANNING
ASSOCIATION

SAN DIEGO

Our Mission



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PLANNING
ASSOCIATION

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The San Diego Chapter of the FPA encourages the success of our members through professional support, public awareness and upholding the virtues of integrity and excellence in financial planning.

Membership

FPA San Diego is committed to bringing its members educational opportunities

Professional Designations CFP (73%) and industry specific resources unsurpassed by any other member AIF association while improving our community's financial CIMA literacy.



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Professional Designations	License, RIA/IAR Type
CFP (73%)	Series 7
CFA (4%)	Series 66
CPA (5%)	Series 65
ChFC (8%)	Series 6
AIF	Series 63
CIMA	SEC Registered
JD	State Registered

As of Dec 2023 – 246 Active Members

2026 Sponsorship (Annual)

Annual Sponsorship Rates	
 Gold - \$5,000	 Silver - \$2,500
Speaking Time at Major Events (Symposium & Summit):	
- 5 minutes of speaking time <i>(or as time permits)</i> - Complimentary Tickets (2) for each event	- 2.5 minutes of speaking time <i>(or as time permits)</i> - Complimentary Ticket for each event
All Annual Sponsors Receive:	
- Recognition and acknowledgment at educational events - List of attendees for all events - Email blast to mailing list	- LinkedIn Spotlight - Logo added to the website - Spotlight in Newsletter

*Premier sponsorship with speaking opportunities may be available for the Symposium and/or Summit, please reach out for more details on costs.

2026 Sponsorship (Event Specific)

Symposium/Summit-Only Sponsorship: \$1500

- Recognition at the event
- Table at the event
- List of attendees post-event
- Mention on event page

Single Event Sponsorship: \$750

- 3 minute speaking opportunity
- List of attendees post-event
- Logo added to event page

2026 Events:



- March 25 - 7th Annual Wealth Management Symposium w/ CFA Society SD
- May 14- Breakfast Meeting with Cozy Whitman
- May 18 - Pickleball Social
- May 20 (tentative) - WIN Happy Hour
- Early June (tentative) - Hike social
- June 16 - WIN Luncheon
- August - WIN event
- Early September - Driving Range
- September 24 - Annual Symposium
- Early September - Driving Range
- TBD - Breakfast Meeting

**Additional events to be added throughout the year, including NexGen socials, WIN educational programs, Women's Initiative socials, and pro bono initiatives.*

Event dates are subject to change.

Statement of Intent

2026 Sponsorship Level

Sponsorship Level	Select One
Gold (\$5000 Annual)	
Silver (\$2500 Annual)	
Symposium Only (\$1500)	
Ad-Hoc Event (approx. \$750)	



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Partner acknowledges that all applications for partnership must be approved by the FPA-SD Board of Directors.

Contact - Printed
Name: _____
Company Name: _____
Email Address: _____
Phone: _____
Company Address: City State ZIP

Preferred contact method:



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SPONSORSHIP COMMITTEE CONTACT: 2026

Chairperson: Christina Hammann

Payments:

Online: fpasandiego.org/Sponsorship