



FINANCIAL
PLANNING
ASSOCIATION

SAN DIEGO

Our Mission



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)



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Annual Sponsorship Rates



Gold - \$5,000



Silver - \$2,500

Speaking Time at Major Events (Symposium & Summit):

| | |
|--|--|
| <ul style="list-style-type: none">- 5 minutes of speaking time <i>(or as time permits)</i>-Complimentary Tickets (2) for each event | <ul style="list-style-type: none">- 2.5 minutes of speaking time <i>(or as time permits)</i>- Complimentary Ticket for each event |
|--|--|

All Annual Sponsors Receive:

| | |
|--|---|
| <ul style="list-style-type: none">-Recognition and acknowledgment at educational events-List of attendees for all events-Email blast to mailing list | <ul style="list-style-type: none">-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:



- January 22 - January Financial Summit
- March 25 - 7th Annual Wealth Management Symposium w/ CFA Society SD
- May 14- Breakfast Meeting with Cozy Whitman
- TBD - Pickleball Social
- September 24 - Annual Symposium
- 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



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2026 Sponsorship Level

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

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