

2025 Sponsor Program

FPA Philly is the premier group in the Philadelphia region bringing together almost 500 local professionals in the financial planning industry.

Join today and meet like-minded professionals working to improve our practices and grow our businesses. Our goal is to provide premier education and industry events, as well as networking and practice management opportunities.

Platinum Sponsorship: \$8,000

Website & Social Media

- Company logo, description & link to your website on our FPA website
- Social Media Spotlights and Chapter website space for events, articles and information about your firm
- Promotion of up to 4 private events
We will help promote targeted events that your firm is hosting outside of the FPA on our website (up to 1 per quarter), social media and targeted email
- Two targeted email campaigns to a select group of our members

Education & Events

- Marquee Sponsor for both the Spring Symposium and Fall Retreat, including:
 - Speaking slot at the Spring Symposium and Fall Retreat
*pending approval of presentation
 - Attendee list of event (not including phone and email)
- Exhibitors Table at our Spring Symposium and Fall Retreat
- Opportunity to present educational session to members
*pending approval of presentation
- Marquee Sponsorship and priority access of location to host one Happy Hour/Event (sponsor responsible for all costs associated with happy hour)
- Mailing list of all chapter members (we are not permitted to share phone or email information of our members)
- Tee time for a foursome at the Fall Retreat/Golf Outing
- Company Signage
- Two passes to attend all of our education events
- Mailing List of event attendees (we are not permitted to share phone or email information of our attendees)

2025 Events*

Jan. 9, 2025

Economic Update

Ryo Tashiro, an economist from the Federal Reserve, will be giving a general overview of the economy

Union League, Philadelphia

February 12, 2025

Webinar: 9:00-10:00 am

March 19 or 20, 2025

Late Afternoon Meeting & Cocktail Reception

Cynwyd Club

April 9, 2025

Webinar: 12:00-1:00 pm

May 14, 2025

38th Annual Spring Symposium

Penn State Great Valley Campus, Malvern

June 11, 2025

Webinar: 9:00-10:00 am

July 11, 2025

Webinar: 9:00-10:00 am

August 8, 2025

Webinar: 9:00-10:00 am

Sept. 15, 2025

Annual Retreat/Ethics/Golf Outing

Radnor Valley Country Club

October 8, 2025

Webinar: 9:00-10:00 am

November 6, 2025

Happy Hour/Fun Event: 5:30-7:30 pm

December First Week

Holiday Party/Toys for Tots

** Does not include the additional events (social and or private)*



Your Partner in Planning™

Contact us at admin@fpaphilly.org to sign up!

32%

of our membership are affiliated with a Broker Dealer

63%

of our membership are affiliated with an RIA

77%

of our membership hold CFP® certification

40%

of our membership are SEC Registered

13%

of our membership are allied professionals

2%

of our membership are aspiring professionals

Gold Sponsorship: \$5,500

Website & Social Media

- Company logo, description & link to your website on our FPA website
- Social Media Spotlights and Chapter website space for events, articles and information about your firm
- One targeted email campaign to a select group of our members
- Promotion of up to 2 private events
We will help promote targeted events that your firm is hosting outside of the FPA on our website, social media and targeted email

Education & Events

- Marquee Sponsor for one of our Education Meetings or Holiday Party including:
 - Signage at the meeting or event
 - Ability to introduce speaker with time allotted to introduce yourself and your firm
 - Attendee list of event (not including phone and email)
- Exhibitors Table at our Spring Symposium and Fall Retreat
- Opportunity to present educational session to members ...
*pending approval of presentation
- Marquee Sponsorship and priority access of location to host one Happy Hour/Event (sponsor responsible for all costs associated with happy hour)
- Mailing list of all chapter members (we are not permitted to share phone or email information of our members)
- Tee time for 1 golfer at our Fall Retreat/Golf Outing
- Company Signage at our Fall Retreat/Golf Outing
- One pass to attend all of our education events

Silver Sponsorship: \$3,500

Website & Social Media

- Company logo, description & link to your website on our FPA website
- Promotion of 1 private event
We will help promote a targeted event that your firm is hosting outside of the FPA on our website, social media and targeted email

Education & Events

- Exhibitors Table at our Spring Symposium and Fall Retreat
- Ability to introduce speaker at our Spring Symposium, Fall Retreat, or Education Event with time allotted to introduce yourself and your firm
- Marquee Sponsorship and priority access of location to host one Happy Hour/Event (sponsor responsible for all costs associated with happy hour)
- Tee time for 1 golfer at our Fall Golf Outing
- Company Signage
- One pass to attend two of our education events