

FPA WI PARTNER BENEFIT OPPORTUNITIES – YEAR 2026

Partnership Levels	Platinum \$6,000	Gold \$4,500	Silver \$2,750	Bronze \$1,500
General Benefits				
Name & logo with direct link to firm's website on FPA home page	•	•		
Firm name listed on FPA home page	•	•	•	•
Chapter promotion of one company hosted webinar	2	1	1	
Electronic spreadsheet of membership (<i>must request</i>)	2	1	1	
First right of refusal to present at Symposium and Free CE Day	•			
First right of refusal to present at Symposium <i>or</i> Free CE Day		•		
One email ad to entire membership (<i>you provide information</i>)	•			
One "Thank you" social media post on our platforms	•	•		
Firm name and logo listed in Newsletter	•			
Firm name listed in Newsletter	•	•	•	•
Partner Spotlight in electronic Quarterly Newsletter	1	1		
Member Meeting Networking Event Sponsorship	•	•		
Video introduction posted on LinkedIn	•	•	•	
Member Meeting Benefits				
Presentation at one meeting	10 mins	5 mins	2 mins	
Annual passes to Member meetings during the year	3	2	1	1
Introduction at every meeting with a representative in attendance	•	•	•	•
Handout company brochures	•	•	•	•
Attendee list from meeting (<i>must request</i>)	•	•		
Financial Planning Symposium Benefits				
Two company representatives at Symposium	•	•	•	•
Two guest registrations to Symposium	•			
Golf Outing sponsorship – includes 2 complimentary golfers	•			
Attendee list from Symposium – one pre- and one post-event	•	•	•	
Exhibitor at Symposium <ul style="list-style-type: none"> Exhibit space/booth Recognition as Partner in Symposium handout materials Full one page handout in attendee folder Introduction at Symposium 	•	•	•	\$1,000

See Letter of Agreement for Benefit Selection Sheet

Methods of Payment: Check, Credit Card – Visa / MasterCard / American Express or ACH payment



PARTNER LETTER OF AGREEMENT FOR YEAR 2026

The undersigned hereby applies to becoming a Partner of the Financial Planning Association of Wisconsin (FPA-WI) chapter for the year 2026. If Partner is accepted, by signing below, Partner understands that this agreement serves for the term of January 1st through December 31st, payable in advance.

The FPA of Wisconsin strives to develop quality partnership relationships with Partners who have a long-term interest in supporting the financial planning industry. Partner understands that FPA-WI has the ultimate right to refuse acceptance to any party without recourse in its pursuit of that goal. All benefits are offered with the understanding that the Partner assumes the responsibility to use benefits within the calendar year.

RESPONSIBILITIES OF PARTNERS

Responsibilities of Partners will include:

- Prompt payment of annual partnership fee.
- Active participation in the education of our membership on your company's products and services.
- Assume the responsibility to take advantage of benefits to be used within calendar year.
- Only Platinum, Gold and Silver Partners have permission to mail correspondence to FPA membership. Request data two weeks prior to mailing date.

FPA of Wisconsin may:

- At its sole discretion, accept, deny, non-renew, and/or terminate Partner. No refunds or carry-overs are given.
- Schedule, reschedule, or cancel, at its discretion, meeting dates or presentations and will not be responsible for any Partner liabilities, financial or otherwise, arising from such actions.

Partner agrees to the above terms, and hereby applies for a partnership with the FPA-WI:

Entered into this _____ day of _____, 202____.

Signed by:

Signature

Printed Name

Company Name (as you want it listed on the website)

The partner to be listed as the contact

Email Address

Website

Mailing Address

City, State, Zip Code

Company Phone

Contact Phone



BENEFIT SELECTION SHEET

Sign Me Up for 2026 Partnership:

- ☐ Platinum Partner - \$6,000
- ☐ Gold Partner - \$4,500
- ☐ Silver Partner - \$2,750
- ☐ Bronze Partner - \$1,500

Submit payment by January 31st to qualify for the Prompt Payment Discount.

Platinum: Deduct \$300 | **Gold:** Deduct \$175 | **Silver:** Deduct \$100

Total Amount Due: \$_____

- ☐ We plan to send a check –
Remit payment to:
FPA of Wisconsin – 1702 Ashlawn Lane, Waunakee, WI 53597
- ☐ Send invoice to be paid by credit card or ACH payment
NOTE: If paid by credit card, a 3% fee will be added to amount due

Special Note:

FPA of Wisconsin may have some special opportunities throughout the year for sponsorships that would provide you with additional exposure. As those become available, we will reach out to you by email – with absolutely no obligation on your part. We are very appreciative of all that you do for us.

- ☐ We may be interested in additional sponsorship opportunities. Estimated cost TBD.