



# FINANCIAL PLANNING ASSOCIATION OF HAWAII

FPA of Hawaii is a regional chapter of the Financial Planning Association (FPA®), the national leadership and advocacy organization representing the financial planning community. Based in Denver, Colo., FPA represents more than 25,000 members nationwide and is involved in all facets of providing financial planning services and works in alliance with academic leaders, legislative and regulatory bodies, financial services firms and consumer interest organizations.

FPA's Primary Aim is to be the community that fosters the value of financial planning and advances the financial planning profession. Whereas the public expects to experience a high level of confidence, trust and clarity in relationships with professionals trained in the distinct process and discipline of financial planning, it is essential that they obtain a commitment of professional care, quality and excellence in the services they receive.

## OUR MISSION

FPA of Hawaii strengthens our community by building an organization of financial professionals dedicated to helping the members/our clients achieve their financial and personal objectives through the financial planning process. We enhance the growth and financial success of our members by providing educational and networking opportunities while upholding the highest standards of ethics and integrity.

## PARTNER BENEFITS

### SUPPORT

Show your support for the planning profession

### RECOGNITION

Be recognized at our meetings, events and on our website for your support of our chapter

### EXPOSURE

Share your firm and services with our membership; opportunities available to speak at our monthly chapter meetings and during the annual symposium

### NETWORKING

Build long-term business relationships

### EXHIBITOR SPACE

Exhibitor space is available at our annual symposium

### PARTNERSHIP LEVELS

Choose the level you want to partner at

OF THE CURRENT CHAPTER MEMBERS THAT REPORTED:

## 80 FPA OF HAWAII MEMBERS

### Members designations:

80% CFP®  
15% ChFC  
5% CPF  
4% CFA

### Members who hold:

51% Series 7  
9% Series 6  
35% Series 65 or 66

### Members insurance licensing:

53% Life Insurance  
45% Health Insurance  
39% Variable Annuity  
37% Fixed Annuity  
4% Property

### Compensation models:

20% Fee Only  
5% Commission Only  
75% Both



## 2024 Rates and Benefits

Symposium Sponsor Levels Attendance:50	LEHUA \$1,800	HIBISCUS \$1,200	PLUMERIA \$800
50 MINUTE CE PRESENTATION			
5 MINUTE PODIUM INTRO ABOUT YOUR COMPANY	●	●	
PASSTO ALL NETWORKINGEVENTS	●	●	
SIGNAGE WITH COMPANY LOGO	●	●	
WEBSITE PRESENCE	●	●	
COMPANY LOGO & REP ON PROMOTIONAL MATERIAL	●	●	
ATTENDEE LSIT (NAME, COMPANY, EMAIL, PHONE)	●	●	
EXHIBIT BOOTH	●	●	
SOCIAL MEDIA RECOGNITION FOR EVENTS	●	●	
Monthly Meetings 10 Meetings - 2nd Tues except Dec. Attendance:60-80			
50 MINUTE CE PRESENTATION	1		
PODIUM TIME: 10 MINUTE INTRO ABOUT YOUR COMPANY	1		1
SUBMIT RESEARCH/WHITE PAPERS FOR MEMBERS TO DOWNLOAD	2		1
ATTENDEE LSIT (NAME, COMPANY, EMAIL, PHONE)	●		●
PASSTO ALL NETWORKINGEVENTS	●		●
WEBSITE PRESENCE	●		●
COMPANY LOGO & REP ON PROMOTIONAL MATERIAL	●		●
SOCIAL MEDIA RECOGNITION FOR EVENTS	●		●

### 2024 SPONSORSHIP OPPORTUNITIIES

Level:    Lehua             Hibiscus             Plumeria

Company: \_\_\_\_\_ Company Website: \_\_\_\_\_

Representative: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Billing Contact: \_\_\_\_\_

Billing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Date: \_\_\_\_\_

Payment Method:

Check (Payable to FPA Hawaii)             or            Complete online payment form and pay via PayPal

Mail to: Financial Planning Association of Hawaii, PO Box 63236, Ewa Beach, HI 96706

 808-589-7624

 [fpaofhawaii@gmail.com](mailto:fpaofhawaii@gmail.com)