

FPA of MD 2008 PARTNER BENEFITS

Benefit	Platinum <i>(Limit 10)</i> \$3,500**	Gold <i>(Unlimited)</i> \$2,000	Silver <i>(Unlimited)</i> \$1,000
Recognition at all FPA of MD meetings and events	X	X	X
Online presence and links on FPA of MD website	X	X	X
Listing on chapter eMarketing announcements	X	X	X
Invitation to annual "partners only" breakfast	X	X	X
Updates to the FPA of MD electronic membership directory	X	X	X
Access to a direct liaison of the FPA of MD Partners Committee	X	X	X
Membership on Partners Committee and invitation to all committee meetings	X	X	X
Access to custom demographic membership data	X	X	X
First right of refusal to renew platinum - level partnership for 2009	X		
First right of refusal to upgrade to platinum - level partnership for 2009		X	X
One 20-minute Non-CE speaking slot or one 25-minute Half-hour CE speaking slot at a chapter CE meeting	X		
First right of refusal for event sponsorship opportunities	X		
Free attendance to all FPA meetings and events	X	X	
Free attendance to five FPA meetings and events			X
Display table at all CE meetings (including Super CE).	X		
Display table at your choice of any 5 CE Meetings		X	
Up to 12 articles per year posted and promoted on the FPA of MD website.	X		
Up to 6 articles per year posted and promoted on the FPA of MD website.		X	
Up to 3 articles per year posted and promoted on the FPA of MD website.			X

FPA OF MARYLAND

PARTNER POLICY & PROCEDURE

The following policy is effective immediately:

1. A 10% discount is available for those **platinum and gold** partners who make payment of the applicable annual fee by January 15th of the then-current year.
2. Renewing partners may elect to pay the applicable annual fee in quarterly installments, without discount. Quarterly installments are due by the 15th day of January, April, July, and October of the then-current year.
3. Preference for available meeting speaking slots is given to **renewing** platinum partners only, based on continuous years as a platinum partner.
4. A partner's slot is not secured until **timely** applicable payment is received. Renewing partners have until **February 15th** to make payment that will secure the slot for the current year.
5. Free attendance at membership meetings is for **one** partner representative **only**. Additional partner representatives who attend a meeting must pay the applicable meeting fee, at Chapter member rates.
6. Requests for guaranteed renewal of all partnership levels (platinum, gold, and silver) and upgrade requests (from current gold- and silver-level partners) for a subsequent year are due no later than October 31st of the current year. Requests for platinum-level partnership upgrades will be accepted in the following order (on a first-come-first-served basis): gold-level partner to available platinum-level partnership, followed by silver-level partner to available platinum-level partnership. Requests from prospective partners will be accepted (after the above-mentioned renewal and upgrade requests) for any available partnerships, after October 31st of the current year (on a first-come-first-served basis).
7. Non-renewing partners will pay the applicable full-year partner fee for any start date during the current year. Beginning with the first day of the second calendar quarter, partner fees will be payable in accordance with the following schedule:
 - For start dates anytime during the 2nd calendar quarter, the partner will have ¼ of the fee paid credited to the renewal fee for the following year. This credit will be applied as the last form of payment.
 - For start dates anytime during the 3rd calendar quarter, the partner will have ½ of the fee paid credited to the renewal fee for the following year. This credit will be applied as the last form of payment.
 - For start dates anytime during the 4th calendar quarter, the partner will have ¾ of the fee paid credited to the renewal fee for the following year. This credit will be applied as the last form of payment.

Financial Planning Association of Maryland reserves the right to change policy at its discretion.

Application for 2008 FPA of Maryland Partnership

1) Contact Information:

Firm Name: _____

Representative Name: _____

Address: _____

Phone Number: _____

E-Mail Address: _____

2) Level of Partnership Applying For:

(Note that Platinum, Platinum + and Platinum ++ levels will be issued on a first come, first serve basis and then by seniority)

_____ Platinum ++ (Limit 1) - \$5,000

_____ Platinum + (Limit 1) - \$4,000

_____ Platinum (Limit 8) - \$3,500

_____ Gold (Unlimited) - \$2,000

_____ Silver (Unlimited) - \$1,000

3) If applying for Platinum, please provide your 1st and 2nd choice of meeting to present:

_____ January

_____ February

_____ March

_____ April

_____ June

_____ September

_____ October

_____ December

4) If applying for Platinum ++, Platinum +, or Platinum, will your presentation be 30 minutes long and offer .5 hours of CFP CE Credit or 20 minutes for NO CFP CE Credit?

_____ 30 Minutes for .5 hours of CFP CE Credit

_____ 20 Minutes for NO CE

5) If applying for Platinum ++, Platinum +, or Platinum please provide three possible topics that you will speak about. Please note that the FPA of Maryland requests that you submit a final topic 30 days in advance of your presentation.

1) _____

2) _____

3) _____

Signature

Date