

FPA of Maryland Partners Committee  
Committee Report May 19, 2005  
Lena M. Nebel

1. Overall Mission:

The Partners Committee of the FPA of Maryland has two primary missions. The first is the organization focused mission to provide strong partnerships with vendors and sponsors to facilitate education in terms of practice development and product knowledge. The second is the partner focused mission to create a value added opportunity for vendors and sponsors to have favorable access to Certified Financial Planner Practitioners® and other financial service professionals for the purposes of business development.

2. Current Committee Members:

- a. Lena Mummert (Chair)
- b. Dave Sloper (liaison to study group committee)
- c. Neil Sweren (Partner and liaison to social event committee)
- d. Dan Reilly (Partner)
- e. Joe Garrison – new committee member
- f. All Partners
- g. Eric Brotman and Mike Curley

3. Committee Meetings

Our next committee meeting is Friday May 20<sup>th</sup> at 7:30am. All partners are welcomed and encouraged to attend.

4. Partners Breakfast

We have decided to add another breakfast, since many partners were unable to attend this breakfast. The partners that were in attendance (AllyMac, Belman Klein, Primus), did provide valuable feedback.

5. Partners List

As of today we have 10 Platinum Partners (12 is our capacity), 3 Gold Partners and 2 Silver Partner. Out of our Partners: 3 increased their sponsorship to Platinum this year, 5 are new partners. We are actively seeking non-traditional partners to fill the spots as well as attend the social events.

6. Outstanding Items

- a. During the Super CE Meeting, all partners will be aligned around the room so that they can have more visibility then last year. We are currently asking our partners if they found this useful.

- b. Referral Program-encourage current members to refer partners. If those partners join, that member will receive a discounted or free membership for one year.
- c. A la Carte Options-many partners have inquired about sponsoring one meeting and/or event. We have decided at the committee level that we will not be doing this. If we have a Technology Expo in 2006, all partners have first right of refusal.
- d. We are currently seeking a Partner Chair for 2006.