

## Financial Planning Association of Maryland (FPA of MD) 2010 Partners' Benefit Statement

As an FPA of MD partner you are entitled to all the following benefits:

- o Recognition at all FPA of MD meetings and events
- o Online presence and links on the FPA of MD website
- o A current electronic copy of the FPA of MD membership directory
- o Listing in all e-marketing messages sent to chapter members
- o Partners Committee membership
- o Access to custom demographic membership data
- o Ability to propose speakers/topics to the FPA of MD Program Committee for its consideration regarding education seminars.

Furthermore, depending on the level of partnership you choose, there are additional benefits. There are **four** levels of partnership available: Premium+, Platinum, Gold, and Silver.

### **ADDITIONAL BENEFITS**

#### **Premium+ -Level Benefits (limit 1)**

Cost \$5,000

- o Opportunity to host a one-hour CE session at **any** CE seminar of your choice.
- o Display table at all education seminars.
- o Up to twelve articles per year posted and promoted on the FPA of MD website.
- o Two season passes to **all** chapter meetings/events in 2010.
- o Chapter promotion of **four** partner-produced education webinars. *These events may be hosted by the chapter or the partner, at the partner's election.*

#### **Platinum-Level Benefits (limit 6)**

Cost \$3,000

- o Opportunity to make a live 20/30 minute infomercial/CE-eligible presentation at one chapter education seminar
- o Display table at six chapter education seminars.
- o Up to eight articles per year posted and promoted on the FPA of MD website.
- o One season pass to **all** chapter meetings/events in 2010.
- o Chapter promotion of **two** partner-produced education webinars. *These events may be hosted by the chapter or the partner, at the partner's election.*

#### **Gold-Level Benefits (unlimited)**

Cost \$2,000

- o Display table at four chapter education seminars.
- o Up to six articles per year posted and promoted on the FPA of MD website.
- o Free attendance for **one** representative at **any six** chapter meetings/events in 2010.

#### **Silver-Level Benefits (unlimited)**

Cost \$1,000

- o Display table at two chapter education seminars.
- o Free attendance for **one** firm representative at **any three** chapter meetings/events in 2010.

FPA OF MARYLAND  
PARTNERS POLICY & PROCEDURES

The following policy is effective October 1, 2009 for 2010 partnerships:

1. A partner's slot is secured by **timely** payment of the applicable **annual** fee. Payment of the annual fee is due on or before **February 1st** of the current year.
2. **Renewing** partners may elect to pay the applicable annual fee in quarterly installments. Quarterly installments are due by the 15<sup>th</sup> day of January, April, July, and October of the then-current year.
3. Preference for available meeting speaking slots is given to **renewing** premium+ and platinum-level partners only, based on continuous years as a premium+ or platinum partner.
4. Free attendance at membership meetings is limited by the current partner benefit statement. **Additional partner representatives who attend a meeting must pay the applicable meeting fee, at chapter member rates.**
5. Requests for guaranteed renewal of all partnership levels (premium+, platinum, gold, and silver) and upgrade requests for a subsequent year are due no later than October 31<sup>st</sup> of the current year.  
Requests for premium+ and platinum-level partnership upgrades will be accepted in the following order (on a first-come-first-served basis): platinum-level partner to available premium+ level partnership, followed by gold-level partner to available premium+ level or platinum-level partnership, and silver-level partner to available premium+ or platinum-level partnership.  
Requests from prospective partners will be accepted (after the above-mentioned renewal and upgrade requests) for any available partnerships, after October 31<sup>st</sup> of the current year (on a first-come-first-served basis).
6. 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 2<sup>nd</sup> 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 3<sup>rd</sup> 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 4<sup>th</sup> 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 2010 FPA of Maryland Partnership

## Contact Information:

Firm Name: \_\_\_\_\_

Representative Name: \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

Phone Number: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

## Level of Partnership:

\_\_\_\_\_ Premium+ (Limit 1) - \$5,000

\_\_\_\_\_ Platinum (Limit 6) - \$3,000

\_\_\_\_\_ Gold (Unlimited) - \$2,000

\_\_\_\_\_ Silver (Unlimited) - \$1,000

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

*Please attach your biography to this application.*