



FPA of the East Bay

P.O. Box 948

Clayton, CA 94517

Telephone (925) 778-1165

Fax (925) 778-1163

EastBayFPA@gmail.com

www.FPAEastBay.org



# 2025 FPA East Bay Partner Benefits

## 1. Sponsorship Levels & Benefits

### *Gold Sponsor (\$2,500 for a 12-month term)*

- **Speaker Opportunity:**
  - You can provide a featured speaker for a monthly meeting. This is subject to approval by the Program Committee, and the presentation topic must be confirmed by January 15, 2025, to ensure it fits within the year's schedule.
- **Recognition in Communications:**
  - Your company logo and contact information will be prominently displayed on the Monthly Meeting Announcement, which is sent to FPA East Bay's database of members and prospects during your sponsored month.
- **Podium Time:**
  - 5 minutes to address the attendees at your sponsored meeting, with the freedom to choose the topic.
- **Pre/Post Chapter Meeting Presentation:**
  - After your sponsored meeting concludes, will have free use of the meeting room to host members or other guests for a presentation of your choice for up to 1 hour.
  - Topic will be included within the multiple email invitations sent to members as well as included in meeting materials and announcements.
- **Educational Content:**
  - You have the option to provide educational articles to be sent to Chapter members via email.
- **Visibility:**
  - Prominent recognition on a rolling slideshow at the meetings.
  - Inclusion in the quarterly regional calendar broadcast email reminder, which covers events for East Bay, San Francisco, and Silicon Valley chapters.
- **Member List Access:**
  - Receive a current list of Chapter members (excluding email addresses).
- **Showcasing on FPA East Bay Website and Social Media:**
  - Your company will be showcased on the Chapter website, LinkedIn page, and emails, including a short bio, photo, and something interesting to share with members.
  - Ability to upload value-added content on the FPA East Bay website and engage with members on LinkedIn and Facebook.
  - An optional spotlight section is available where you can submit a bio, company highlight, and a picture for the FPA East Bay website.
- **Event Promotion:**
  - You can provide event information to be listed on the Chapter website's event page, which will also be announced during chapter meetings.
  - Your upcoming meetings, seminars, or hosted events can be announced at monthly meetings and posted on the Chapter website.



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## ***Gold Sponsor (\$2,500 for a 12-month term) continued...***

- **Meeting Presence:**
  - Recognition as a sponsor on table "tent cards" at all Chapter meetings.
  - Access to a shared sponsor table for product literature or displays at all Chapter meetings.
  - Opportunity to give a 30-60 second introduction of yourself and firm at 2-3 meetings per year, based on availability.
- **Networking & Video Opportunities:**
  - Option to record a 30-second video introduction that will be posted on the Chapter website.
- **Mailing Label Template:**
  - A template is provided to send materials to Chapter members.
- **Newsletter Inclusion:**
  - Listing in the FPA Planner Quarterly Printed Newsletter with your company logo.
- **Meeting Attendance:**
  - Free admission for up to 10 regular Chapter breakfast meetings (a \$450 value) and one free guest pass per month (a \$900 value).

## ***Silver Sponsor (\$1,500 for a 12-month term)***

- **Shared Benefits with Gold Sponsors:**
  - Recognition on the Chapter website, LinkedIn, and emails (but without the logo in the quarterly printed newsletter).
  - Opportunity to give a 30-60 second introduction of yourself and firm at 2-3 meetings per year, based on availability.
  - Ability to upload content to the website and participate in social media.
  - Access to the Chapter member list (excluding emails).
  - Inclusion on table tent cards and the shared sponsor table at meetings.
  - Option to record a 30-second video introduction that will be posted on the Chapter website.
  - Event information can be listed on the website and announced at meetings.
  - Mailing label template provided for sending materials.
  - Announcements of your events at monthly meetings and on the website.
  - Prominent logo placement on the website (without contact information).
  - Free admission to 10 regular Chapter breakfast meetings (a \$450 value) and one free guest pass per month (a \$900 value).

## ***Additional Sponsorship Opportunities***

- **Hosted Happy Hours (up to \$500 per event)**
  - Opportunity to sponsor and host an East Bay FPA happy for members and guests.
  - 6-8 events per calendar year.
  - East Bay FPA board will send multiple invitations to membership with sponsor name and logo included, handle all registration as well as list of registrants and attendees.
  - Will be recognized during the event by an FPA Board member and be able to speak about a topic of their choice.
  - Signage and materials can be included upon request.
  - If preferable, can split the cost with another sponsor/partner.



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- **Hosted Bar at Chapter Meeting (\$1500-\$2000/event)**

- Opportunity to sponsor and host the bar at an East Bay FPA Chapter meeting. When we hold an evening meeting we include a cocktail hour prior to the speaker.
- 1-2 Chapter meetings per calendar year.
- Sponsor name, logo and company will be included in all regular email communications to members regarding the meeting, how to register speaker etc.
- Will be recognized during the event by an FPA Board member and be able to speak about a topic of their choice.
- Signage and materials can be included upon request.
- Full or partial contribution available.

## 2. General Meetings Schedule for 2025

- Meetings are held mostly on the second Wednesday of each month, with dates and times as follows:
  - Tuesday, January 14, 2025 (BREAKFAST 7:30 AM - 9:15 AM) Round Hill Country Club
  - Wednesday, February 12, 2025 (BREAKFAST 7:30 AM - 9:15 AM) Orinda Country Club
  - Wednesday, March 12, 2025 (LUNCH 11:30 AM - 1:15 PM) Orinda Country Club
  - Wednesday, April 30, 2025 (BREAKFAST 7:30 AM - 9:15 AM) Orinda Country Club
  - Wednesday, July 16, 2025 (LATE AFTERNOON 3:30PM to 5:15PM) Orinda Country Club
  - Wednesday, August 13, 2025 (LUNCH 11:30 AM - 1:15 PM) Orinda Country Club
  - Wednesday, September 10, 2025 (LUNCH 11:30 AM - 1:15 PM) Orinda Country Club
  - Wednesday, October 8, 2025 (LUNCH 11:30 AM - 1:15 PM) Orinda Country Club
  - Wednesday, November 12, 2025 (LUNCH 11:30 AM - 1:15 PM) Orinda Country Club
  - Tuesday, December 9, 2025 (LATE AFTERNOON 3:30PM to 5:15PM) Orinda Country Club

## 3. Networking Event Schedule for 2025

- Networking events locations alternate between Headlands Brewery in Lafayette and Chicken Pie Shop in Walnut Creek and have scheduled with dates and times as follows (locations of each event TBA):
  - Tuesday, January 28<sup>th</sup> from 4-6pm (LOCATION TBA)
  - Tuesday, March 18<sup>th</sup> from 4-6pm (LOCATION TBA)
  - Tuesday, May 20<sup>th</sup> from 4-6pm (LOCATION TBA)
  - Tuesday, June 17<sup>th</sup> from 4-6pm (LOCATION TBA)
  - Tuesday, September 23<sup>rd</sup> from 4-6pm (LOCATION TBA)
  - Tuesday, November 18<sup>th</sup> from 4-6pm (LOCATION TBA)



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## 3. Sponsorship Reservation Process

- **Form Submission:**
  - To reserve a sponsorship, companies must fill out a reservation form that includes details like company name, website, representative's contact information, and preferred sponsorship level.
- **Payment:**
  - Payment must be attached or preceded by the form. The day of receipt determines the availability of the preferred presentation date and sponsorship level.
  - The tax ID number for FPA East Bay is provided (58-1311876), and checks should be made payable to FPA East Bay.
  - Sponsorships are subject to Board approval, and the Board reserves the right to revoke sponsorship at any time.

## Sponsorship Reservation Form Details

1. **Company Name:**
  - Enter the full name of your company.
2. **Listing on Marketing Materials:**
  - Specify how you want your company to be listed on all marketing materials. If it's the same as the company name, you can check "Same as above," or you can provide a different name if preferred.
3. **Company Website:**
  - Provide the URL for your company's website.
4. **Company Representative:**
  - **Name:** Enter the name of the representative who will be the primary contact for the sponsorship.
  - **Local Address:** Fill in the local address of the representative.
  - **City, State, Zip:** Provide the full address, including the city, state, and zip code.
  - **Phone:** Enter the phone number where the representative can be reached.
  - **Email:** Provide the email address for the company representative.
5. **Newsletter Delivery Address:**
  - If you want to receive the Regional Newsletter ("The Planner") at the same address as the representative's address, check "Same as above." Otherwise, fill in the preferred name, address, city, state, zip, phone, and email where you'd like the newsletter to be sent.
6. **Sponsorship Level:**
  - Choose between the **Gold** (\$2,500) or **Silver** (\$1,500) sponsorship level by checking the appropriate box.
  - **Gold Sponsors Only:**
    - **Preferred Sponsorship Month:**
      - Indicate your 1st, 2nd, and 3rd choices for the month you would like to be the featured sponsor. This includes the 5-minute presentation opportunity during your chosen month's meeting.

This form is essential for finalizing your sponsorship and ensuring that your company is correctly represented and recognized during your sponsored month. Let me know if you need help with anything else!



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## Sponsorship Reservation Form

**Please complete the form below. This form must accompany or precede payment.** Please note that the FPAEB chapter does not formally endorse any sponsor or related product(s) and all sponsorship requests are subject to Board discretion. The Board reserves the right to revoke sponsorship at any time.

1. Company Name: \_\_\_\_\_

2. How do you want your company to be listed on all marketing materials? Same as above or fill in: \_\_\_\_\_

3. Company Website: \_\_\_\_\_

4. Company Representative: \_\_\_\_\_ (Name)  
 \_\_\_\_\_ (Local Address)  
 \_\_\_\_\_ (City, State, Zip)  
 \_\_\_\_\_ (Phone)  
 \_\_\_\_\_ (Email)

5. Where would you like to receive your Regional Newsletter (The Planner) *Same as above or fill in below.*  
 \_\_\_\_\_ (Name)  
 \_\_\_\_\_ (Local Address)  
 \_\_\_\_\_ (City, State, Zip)  
 \_\_\_\_\_ (Phone)  
 \_\_\_\_\_ (Email)

6. Sponsorship Level: \_\_\_\_\_ Gold (\$2500)      \_\_\_\_\_ Silver (\$1500)

**Gold Sponsors Only**  
 Please indicate your preferred month to be the featured sponsor (includes 5 minute presentation)  
 1<sup>st</sup> Choice \_\_\_\_\_ 2<sup>nd</sup> Choice \_\_\_\_\_ 3<sup>rd</sup> Choice \_\_\_\_\_

**Networking or Cocktail Sponsor**  
 Please indicate your preferred month to be the featured networking event or cocktail sponsor (includes introduction)  
 1<sup>st</sup> Choice \_\_\_\_\_ 2<sup>nd</sup> Choice \_\_\_\_\_ 3<sup>rd</sup> Choice \_\_\_\_\_



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## Invoice for 2025 Sponsorship of the East Bay Financial Planning Association

Amount Due: (Check One)			
<input type="checkbox"/> Gold Sponsor (\$2500)		<input type="checkbox"/> Silver Sponsor (\$1500)	
<input type="checkbox"/> Networking Event Sponsor (pay onsite/ \$500 cap)		<input type="checkbox"/> Cocktail Sponsor (pay onsite/ \$2000 cap)	

**Please attach a check made payable to FPA East Bay or complete the credit card authorization form below, and Attach a Business Card of the local representative.**

The tax ID number for the East Bay Chapter of the FPA is **58-1311876**

**Mail or FedEx to:** FPA East Bay  
 P.O. Box 948  
 Clayton, CA 94517

Remember that sponsorship is available on a first-come, first-served basis, based on the day we receive your payment. The day of receipt also determines whether your choice presentation date will be available. Checks that arrive after 2025 sponsorships are sold out will be returned.

Check/Credit Card		Authorized Amount <input type="checkbox"/> \$_____.	
Name			
Company			
Billing Address			
Phone		Email	
Card Number			
Expiration		CVV	
Signature			
Check #			





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## Spotlight Website *(Optional)*

We would love to highlight you on the [www.FPAEB.org](http://www.FPAEB.org) chapter website. Please include a short bio, photo, and something interesting to share with members and prospects.

Please fill out all information below.

**Name:**

**Title:**

**Email:**

**Company Web Address:**

**Linkedin Address:**

**For Bio**, please write a few sentences describing yourself and what you do for a living.

**For Company Highlight**, please write a few sentences describing your company, what sets you apart or a recent client victory and your ideal client.

**Picture:** Please choose a picture that best describes you. It can be anything you like, a photo of just yourself or a photo with you and your family or coworkers.