

Vision Statement

Diversity is an integral part of our culture and identity. Inclusion is the way we treat and perceive all individuals and differences. We strive to create an inclusive culture where diversity is seen as a value for the Association to elevate the profession that transforms lives through the power of financial planning.



FPA DE&I Knowledge Circle Partnership

\$20,000 per year

In 2023, the Diversity, Equity and Inclusion Committee will again partner with FPA Knowledge Circles dedicated to diverse communities to host seven webinars honoring heritage months. The webinars will be broadcast live and accessible as on-demand content following the initial broadcast. All content will be free to members and non-members and may offer CFP® CE credits. The following Knowledge Circles plan to present a webinar in 2023:

February: African American	September: FPA Latino
March: Women and Finance	October: Disability Employment
May: Asian American/Pacific Islander	November: Native American
June: PridePlanners	

Partner benefits include:

- Host two DEI-focused webinars
- Engage in a panel discussion or be a speaker during a DEI and community focused webinar (if approved by a Knowledge Circle)
- Share messages through each of the seven community focused Knowledge Circles during cultural or identity celebration months (message must be approved and sent by FPA)
- Partner-created DEI content shared as *Journal* sponsored content and pushed through Weekly Wrap (2 months)
- Logo placement
 - » FPA Learning Center webinar registration page
 - » Knowledge Circle homepage during the cultural or identity celebration month
 - » In FPA marketing materials, as appropriate

Reach: 4,000+

Virtual DEI Toolkit for FPA Chapters

\$20,000

FPA's chapter network operates throughout the country, providing a direct, community-oriented focus for chapter webinars and events. FPA will build a DEI toolkit for chapter use during their local events and educational programming. This toolkit will focus on actionable items, easily implemented by attendees, and include FPA-created content on the following or similar topics:

- Implicit bias
- How to be a bias interrupter
- Importance and appropriate use of pronouns
- Psychological safety
- Building an inclusive office
- Five things to do to hire diverse talent

FPA-created content will be in PowerPoint decks for use by the chapters. FPA will also record content for chapters to use on-demand as virtual educational presentations.

Partner-developed content will be included in the PowerPoint decks, as well as whitepapers, worksheets, or other relevant content. The partner may also be included in the on-demand content. Chapter contact information will be shared with the partner, and live partner presentations may be arranged upon chapter request.

Partner benefits include:

- Partner-developed content included in DEI toolkit
- Partner presentation included in on-demand content
- Partner support acknowledged at top of on-demand content
- “Powered by” positioning in marketing materials including
 - » Chapter Leader e-newsletter
 - » Take 5 alerts to Chapter Leaders and members
- Partner logo placement
 - » Toolkit landing page
 - » On toolkit content including presentation slides
 - » In marketing materials, as appropriate

Reach: 2,000

Note: All partner content and materials must be vetted and approved by FPA’s DEI consultant.

FPA Annual Conference 2023 DEI Pre-Con

\$38,000

Free for attendees, this half-day session will take place the day before FPA Annual Conference 2023 in Phoenix, AZ. The program format may include a didactic session, a panel, or small group discussions. Content will be co-developed by the FPA DEI Committee and the partner. The partner is welcome to present their content as a session or as part of a panel discussion. A networking reception will follow the Pre-Con. The program will be marketed to attendees in conjunction with the campaigns for FPA Annual Conference registration.

Partner benefits include:

- 10’x10’ exhibit booth at FPA Annual Conference 2023
- Partner-developed content presented as part of programming
- Partner email sent to attendees following presentation
- Partner support acknowledged at top of program
- “Powered by” positioning in marketing materials

- Partner logo placement
 - » On-site signage
 - » Branded items at reception
 - » In marketing materials, as appropriate

Reach: 50 attendees

CHOIR Certification

\$15,000

FPA has retained CHOIR to support our continued commitment to diversity, equity, and inclusion throughout our programming. In 2023, FPA will partner with [CHOIR](#) to seek/share:

- Conference Diversity Certification for FPA Retreat, and FPA Annual Conference 2023
- Toolkit for chapters that includes event planning materials such as a speaker diversity tracker, sponsor scripts, email templates, anti-harassment policy template, pledge standards checklist, best practices document, how to talk about race and gender with speakers, sponsors, etc.
- Beta access to Voices Search, a speaker directory that will help FPA and our chapters access diverse speakers willing to present on a variety of topics.

Partner benefits include:

- “Powered by” positioning associated with certification-related marketing and announcements
- Opportunity to include materials in the toolkit for chapters (must be FPA approved)
- Listing of the partner’s speakers in Voices Search