

**FPA****RETREAT**

FPA Retreat 2024

May 6-9, 2024 | Loews Ventana Canyon Resort, Tucson, AZ

In 2024, FPA Retreat brings financial planning's top minds together to challenge current thinking, forge lasting connections, and pursue excellence in financial planning.

About the Attendees*

Total attendees: 250

Firm Size



52%	2-10 Staff
25%	11-50 Staff
15%	Sole Practitioner
8%	51+ Staff

Role in Firm



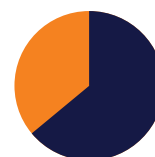
30% Own their firms

Total advisors: 180

Career Stage



Assets Under Management



64%	\$0-\$99.9M
36%	\$100M+

*Attendee data reflects FPA Retreat 2023 attendees with complete member profiles.



Partnership Opportunities

	Platinum \$15,000	Gold \$12,000	Silver \$9,000	Bronze \$6,000
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Partner Benefits

Amenity or Event	Choose one Platinum Level amenity below	Choose one Gold Level amenity below	Choose one Silver Level amenity below	Exhibit tabletop only
See list of events and amenities beginning on page 3				
Company specific dedicated email pre- or post-event (sent by FPA to all attendees)	x			
Company specific insertion in pre-event e-newsletter (sent by FPA to all attendees)	x	x		
Flyer included in FPA Retreat app virtual conference bag	x	x		
Company specific push notification through conference app	x	x	x	
Pre- event attendee list (opt-in attendees, USPS address only)	x	x	x	
Post-event attendee list (opt-in attendees, USPS address only)	x	x	x	x
Complimentary registrations	4	3	3	2
Extra drink tickets to share with attendees	8	4	2	
Tabletop exhibit display	x	x	x	x
Opportunity to network throughout meeting	x	x	x	x



Partner Acknowledgement

Pre-conference <ul style="list-style-type: none"> • Conference website • Within marketing materials, as appropriate 	x	x	x	x
On-site <ul style="list-style-type: none"> • Signage • Walk-in slides • Listing in conference app • Verbal thank you from podium by FPA leadership 	x	x	x	x

Platinum Level Amenities and Events - SOLD

\$15,000

Gold Level Amenities and Events

\$12,000

Goofy Golf

A popular event, this experience offers putt putt holes, minute-to-win-it games, and more! Engage attendees in a lighthearted way as they compete against each other. Host a hole-in-one activity during Goofy Golf or offer a prize to the winning team. Branding opportunities may include drink tickets, napkins, signage, and logo placement throughout.

Breakout Session

Present your thought leadership content during a 75-minute concurrent breakout session. The format may include a panel, debate, fireside chat, or didactic presentation. FPA will seek CE credit on behalf of the company. All content is subject to FPA review and approval. A total of eight sessions are available.

Keynote Underwriting

Support amazing keynote speakers by underwriting the general sessions. The opportunity includes an on-stage introduction of two of the three keynote speakers, a mention of your company, acknowledgement of support by FPA leadership during the general sessions, and multiple branding opportunities. All comments must be pre-approved by FPA.



FPA Retreat Arrival Experience

Greet attendees as they arrive with an activity, special guest, or snacks and a custom drink that channels the local destination. Branding opportunities may include drink tickets, napkins, and signage.

Massage Station

The massage station is an attendee favorite! The experience includes a massage team for two days of the event. Attendees must stop by your tabletop exhibit to reserve a massage. Capture their contact information with the sign-up sheet provided by FPA. Multiple branding opportunities, including signage, tickets, and massage therapists' t-shirt color are available.

Silver Level Amenities and Events

\$9,000

Happy Hour

Help attendees unwind during end-of-day small group sessions by sponsoring a happy hour. Branding opportunities may include a special cocktail, napkins, signage, and drink tickets. A total of two happy hours are available.

Breakfast or Lunch

The partner can place table tents, chair drops throughout the room, or a gift at each place setting. Branding opportunities may include a unique dessert, table centerpieces, up-lighting or logo projection, buffet table décor, branded napkins or cups, bar wrap, and signage. A total of five meals are available.

Yoga Class

Offer early risers the opportunity to stretch their minds and bodies before the day's activities. The opportunity includes a 60-minute yoga class with a certified yoga teacher for up to 30 attendees. Attendees must stop by your tabletop exhibit to reserve a spot in class. Branding opportunities may include signage, and verbal recognition by the yoga teacher. Giveaways like towels or water bottles can be sourced through FPA at an additional cost.

T-Shirts

Hand out the official event t-shirt at your booth! The front of the t-shirt will feature the FPA Retreat logo, and the back will feature your company logo.

Registration

Co-locate your exhibit tabletop booth with FPA Retreat registration. You can hand out company-specific materials and branded swag.



Treasure Chest

Attendees are encouraged to drop reflections and learnings into the Treasure Chest throughout the event. On the final day, leaders read attendees' observations and takeaways during a general session. The Treasure Chest will be placed near the supporter's tabletop exhibit. The supporter will be acknowledged on the Treasure Chest station and during the review of attendees' reflections.

Mobile App

Help members navigate the event and connect with each other—and you! Your ad is displayed on the splash screen when opening the app and as a sticky banner on the main screen, providing visibility every time attendees open or navigate within the app.

Conference WiFi

Create and share the WiFi password with attendees on signage and as a full-page ad in the event notebook.

How to Engage

You're encouraged to bring thought leaders, interact with attendees as peers, and lead meaningful conversations. Your expertise, insight, and leadership help attendees explore new ways to advance the profession, serve clients, and grow modern planning practices.

