



FPA Retreat 2023

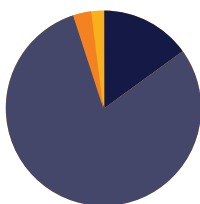
May 1–4, 2023 | Hyatt Regency Coconut Point Resort and Spa—Bonita Springs, Fla.

In 2023, FPA Retreat will again bring financial planning's top minds together to challenge current thinking, forge lasting connections, and pursue excellence in financial planning.

About the Attendees

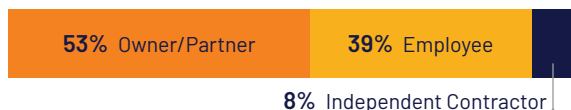
Total attendees: 400

Firm Size



15%	Sole Proprietor
80%	0-50 staff
3%	51-200 staff
2%	101+

Role in Firm

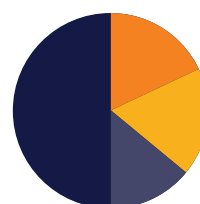


Total advisors: 280

Career Stage



AUM



18%	\$0-49M
18%	\$50-99.9M
14%	\$100-149.9M
50%	\$150M+



Partnership Opportunities

Diamond	Platinum	Gold	Silver	Bronze
\$28,000	\$18,000	\$15,000	\$12,000	\$9,000

Partner Benefits

Amenity or Event	Choose between a breakout session & one amenity or two amenities	Choose between a breakout session or one Platinum Level amenity	Choose one Gold Level amenity	Choose one Silver Level amenity	Choose one Bronze Level amenity
See list of events and amenities below					
Dedicated email pre- or post-event (sent by FPA to all attendees)	x				
Insertion in pre-event e-newsletter (sent by FPA to all attendees)		x			
Company specific push notification through conference app	x	x			
Invitation to lunch with select FPA Board members	x	x	x		
Flyer included in FPA Retreat app virtual conference bag	x	x	x	x	
Extra drink tickets to share with attendees	15	10	10	5	5
Conference notebook belly band or cover tip	One available at cost				
Full-page ad in conference notebook	Free	\$800	\$1,000	\$1,200	\$1,500
Half-page ad in conference notebook		\$300	\$500	\$800	\$1,000
Registrations	4	4	3	2	2
Discount on additional registrations	20%	15%	15%	10%	10%
Tabletop exhibit display*	x	x	x	x	x
Opportunity to network throughout meeting	x	x	x	x	x
Pre- and post-event attendee list (opt-in attendees only)	x	x	x	x	x



Partner Acknowledgement

Pre-conference <ul style="list-style-type: none">• Conference website• Within marketing materials, as appropriate• Social post materials	x	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	x

*Tabletop exhibit package includes 8' table and drape, two chairs, trashcan.

Diamond Level Amenities and Events

\$28,000

Speaking Engagement and Amenity

Choose one of the following options:

- Host a breakout session and an amenity from any of the sponsorship levels below.
- Two amenities, select from any of the sponsorship levels below.

Platinum Level Amenities and Events

\$18,000

Opening Keynote

This fun, engaging experience safely pushes attendees out of their comfort zones. The evening starts with a cocktail hour. Attendees are then asked to complete hands-on activities and eat dinner with a surprise twist! The keynote speaker guides attendees through discussion about and understanding of thriving through uncertainty. Branding opportunities may include signature drink, giveaways, verbal acknowledgement of support, signage.



Breakout Session

Present your thought leader content during a 75-minute concurrent breakout session. Topics of interest include direct indexing, pitfalls to avoid in succession planning, completing due diligence on custodians and vendors, investing in a rising or higher interest rate environment and others. The format may include a panel, debate, fireside chat, or didactic presentation. All content is subject to FPA review and approval. A total of eight sessions are available.

New! FinTech Ux

Headline and emcee the new FinTech Ux, a session dedicated to innovation. Not only will you have the opportunity to pitch your product(s) to all Retreat attendees, you can also emcee the session highlighting an additional 6-8 FinTech startups. A happy hour will follow the session, during which you will have the opportunity to share additional information about your product(s) to interested attendees. Branding opportunities may include pre meeting marketing, logo placement, special cocktail, napkins, signage, and drink tickets.

Gold Level Amenities and Events

\$15,000

Closing Night Party

Celebrate a successful event with attendees! Includes live stage recognition and comments from a company representative, branding and logo placement.

Locally Sourced Alcohol Tasting

Bring a local flavor to attendees with spirits, microbrews, or wine. Includes 200 tickets for a tasting experience that will be the talk of the event.

Keynote Underwriting

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



Silver Level Amenities and Events

\$12,000

FPA Retreat Arrival Experience

Greet attendees as they arrive with an activity, special guest like baby gators, or snacks and a custom drink. 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 and multiple branding opportunities, including signage, tickets, and massage therapists' tee shirt color. Giveaways like stress balls, mini massagers, or cold gel packs can be sourced through FPA at an additional cost. Attendees must stop by your tabletop exhibit to reserve a massage.

Goofy Golf

A popular event, this experience offers a mini golf course and lawn games. Engage attendees in a lighthearted way as they compete against each other. Host your own hole in one activity during Goofy Golf or offer a prize to the winning team. Branding opportunities may include drink tickets, napkins, bar station wraps, or signage, logo placement throughout.

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. Total of 5 available.

Bronze Level Amenities and Events

\$9,000

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 75 attendees. Attendees must stop by your tabletop exhibit to reserve a spot in class. Branding opportunities may include signage, floor clings, and verbal recognition by the yoga teacher. Giveaways like towels or water bottles can be sourced through FPA at an additional cost.



Cell Phone Charging Lounge

Co-locate your tabletop exhibit with the cell phone charging lounge. Learn about attendees' business priorities and share your products and services while attendees recharge and refuel in the branded lounge. Giveaways like portable chargers can be sourced through FPA at an additional cost.

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

Happy Hour

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

Fire Pit and S'mores Station

Offer attendees an evening snack to use at the fire pit from your exhibit table. Experience includes branded s'mores kits, reservation of a fire pit.

Coffee and Snack Break

Serve a mid-morning or afternoon treat and coffee break near your tabletop exhibit. Branding opportunities may include napkins and signage.

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.