



February 2020

LETTER FROM THE PRESIDENT

Greater San Antonio, which makes up the southwestern corner of the Texas Triangle, is an eight-county metropolitan area with well over 2.5 million people. In the last eight years, San Antonio alone has grown by over 320,000 people; essentially dropping a city the size of Corpus Christi into its backyard. This rapid growth has brought job transfers, new housing, budget modifications and a bevy of needs which require financial considerations. Your financial planning practitioners serve on the front lines to assist households and communities through the delivery of responsible and reliable financial advice and guidance.

The membership of the [San Antonio & South Texas Chapter](#) of the Financial Planning Association (FPA) is actively engaged with this growing community and frequently volunteers expertise through pro bono services. But as practitioners, the FPA is our professional network. It's where we find opportunity not only to teach, but also to learn. It's our advocate at national legislation, but also our encouragement at the local level. It's where we pave the path for a new generation of practitioners, but also where we find inspiration for the next stage of our own careers. The FPA is our community.

Our annual Symposium being held on May 6th at the Norris Center is an all-day event featuring a stellar lineup of guest speakers as well as a job fair. You may be aware that USAA, San Antonio's largest financial services employer, recently sold its asset management division to Victory Capital® and its wealth management unit to Charles Schwab, Inc. Our job fair will bring together people and resources to encourage and support those who have a need or a desire to consider the next step of their career in the financial services industry.

The 20th Anniversary of the FPA represents the achievement of a longstanding goal to build a community from practitioners who impact the lives of their clients through the profession of financial planning. Your support as a sponsor will help us achieve the goal of supporting over 150 participants from the Greater San Antonio area who represent the financial planning community. In the subsequent pages of this letter you will find several options listed for participating as a sponsor. I would personally like to ask you to consider making a 2-year commitment to Symposium. If this is possible for your organization, it will equip our volunteer Board of Directors to spend more time focusing on making next year's event even better.

I am very excited about the impact the financial planning community is having on the Greater San Antonio area. Thank you for considering a partnership with us in promoting the knowledge and growth of this great community.

For questions, please contact our Executive Director, Lynn Getz, at (210) 822-6600 or execdir@fpasatx.org

With sincere gratitude,
Charles R. Garcia, CFP®



OF SAN ANTONIO & SOUTH TEXAS

Chapter Sponsors Benefits		Value	Platinum \$5,000	Gold \$2,500	Silver \$1,000	
Symposium Sponsor Spotlight (10 min)	\$500		X			
Exhibition at Symposium & Job Fair	Varies		Large Table (\$500 value)	Large Table (\$500 value)	Small Table (\$250 value)	
Advertising Space in Symposium Program	Varies		Two Full Pages (\$700 value)	One Full Page (\$360 value)	½ Page (\$200 value)	
Symposium Program Back Cover	\$500		X			
Sponsor Spotlight Presentation at one Chapter Luncheon	\$150+		5 Minute Intro	5 Minute Intro	2 Minute Greeting	
Opportunity to Deliver Educational Presentation	\$500		X			
Chapter Luncheon Entry Tickets	Varies		20 Tickets (\$800 value)	10 Tickets (\$400 value)	Member Pricing (\$100 value)	
Chapter Luncheon Exhibit Space	\$150		X	X		
Email Blasts to Membership (Chapter Facilitated)	\$250		4 Emails	4 Emails	2 Emails	
Sponsor Logo on all Membership Updates	\$500		X			
Chapter Website Listing	\$250		X	X	X	
Chapter Demographic Report	Priceless		X	X	X	
Repeat Sponsor Recognition	Priceless		X	X	X	
Symposium Sponsors		Value	Carry Bag \$1,000	Notepad \$750	Large Table Exhibition at Symposium & Job Fair \$500	Small Table Exhibition at Symposium & Job Fair \$250
Available Amount			1	1	Multiple	Multiple
Logo on Sponsored Gear for Symposium	\$250		X	X		
Advertising Space in Symposium Program	Varies		½ Page (\$200 value)	½ Page (\$200 value)	¼ Page (\$120 value)	¼ Page (\$120 value)
Chapter Luncheon Entry Tickets	Varies		5 Tickets (\$200 value)	Member Pricing (\$100 value)	Member Pricing (\$100 value)	
Chapter Website Listing (with link to company website)	\$250		X	X	X	X

 = Symposium Benefits
  = Chapter Luncheon Benefits
  = Additional Benefits



LETTER OF AGREEMENT FOR CHAPTER SPONSORS

Sponsor agrees to the above terms, and hereby applies for a partnership with the Chapter in the Program on the _____ day of _____, 2020.

Signed by:

Authorized Signature

Date

Printed Name

Company Name

Address, City, State, and Zip

Contact Phone

Fax

Contact E-mail

Company Website (to be linked to the Chapter website)

* If you are a new Corporate Sponsor, or if you are an existing Sponsor and your logo has changed, please send your company logo to Lynn Getz, Chapter Executive Director at execdir@fpasatx.org in JPG or GIF format.

* If the information to be listed on the Chapter website is different from above, please include how you would like the website listing to read below. If the contact information above appears as you would like to be listed on the website, please leave blank.

Printed Name

Company Name

Address, City, State, and Zip

Phone

Fax

Fax this page, the benefit selection sheet for your level of sponsorship (Platinum, Gold, Silver, or Bronze), along with the Sponsorship Invoice to 210.822.6600



OF *SAN ANTONIO & SOUTH TEXAS*

SAN ANTONIO & SOUTH TEXAS SPONSOR INVOICE

CONTRACT STARTING DATE	TERMS
/ /	Fee commitment must accompany signed contract.

Selection	Description	Price Per Yr.	Contract Term		Total Paid
			Year 1	Year 2	
	Platinum Sponsor	\$5,000			\$
	Gold Sponsor	\$2,500			\$
	Silver Sponsor	\$1,000			\$
	Bag Sponsor	\$1,000			\$
	Notepad Sponsor	\$750			\$
	Large Table Sponsor	\$500			\$
	Small Table Sponsor	\$250			\$

Total Due \$_____

____ **Will pay by check (due within 10 days)**

Mail to: FPA of San Antonio & South Texas, P.O. Box 34036, San Antonio, Texas 78265
Payable to: FPA of San Antonio & South Texas

____ **Please charge my credit card for the total amount due: \$**_____

CC#_____ **Exp. Date:** _____

CDC Code:_____ **Name on card:** _____

Address where the credit card statement is mailed to: _____

Thank you for your participation in our Sponsorship Program.
We look forward to working with you during the coming year.