FPA Los Angeles Chapter
PO Box 4130
Scottsdale AZ 85261
Phone: 602-840-2900 X1   Fax: 480-922-5283
Admin@FPALA.org

FPA of Los Angeles

2023 Corporate Partners Program

For more information about Partnership Opportunities with FPALA, please contact
David Tassone at dtassone@kayecapital.com | 310-733-8386

FPA FINANCIAL PLANNING ASSOCIATION
LOS ANGELES

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2023 PARTNERS PROGRAM













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Who Are We?

FPA's individual members include financial planners, many of whom hold the CFP certification or are pursuing CFP certification. Other individual members include practitioners such as accountants, attorneys, bankers, charitable giving specialists, insurance agents, stockbrokers, money managers, investment consultants, broker-dealer and corporate executives, and others who champion the financial planning process.

FPA is also home to Broker/Dealer Members – NASD member firms that are in the retail securities business and whose representatives are allowed to offer more than proprietary products.

FPA's Corporate Members include corporations and other entities that provide products and services offered to or through financial advisers.

Firms Our Members Belong to:

Abacus Wealth Partners, LLC

Abbot Downing

Acacia Wealth Advisors

AG Asset Advisory, LLC

American California Financial Services, Inc

American Financial Network

American Heart Association Charitable Estate Planning

Ameriprise Financial Services, Inc.

Anora Tadjikhodjaeva

Aqua Capital Advisors

Argos Wealth Advisors

Aspiriant

AXA Advisors, LLC

Bank of The West

Baroda Ventures LLC

Barrett Planning Group, Inc.

BNG Accountancy Corporation

Britt & Associates

Bruce Colin

California Retirement Advisors

Caliber Home Loans

California Retirement Advisors

Cantor Fitzgerald Capital

Capital Group

Capital Guardian Trust Company

Capital Intelligence Associates

Captrust

Cerda Munoz Advisors, Inc.

Cetera Advisor Networks LLC

Cetera Financial Group

Charles E. O’Connor

Charles Schwab Advisor Services

Charles W. Mason & Associates

Charlesworth & Rugg, Inc.

Chubb

City National Bank

CSU Northridge

CLG Wealth Management

Cook and Associates

Covington Capital Management

Cue Financial Group Inc.

Dorsey Wealth Management

DRM WEALTH MANAGEMENT

Edward D Jones & Co

EP Wealth Advisors, LLC

Fidelity Investments

Financially Wise Women

Foundry Financial

Fraser Financial Group

Gerber Kawasaki Wealth & Investment Management

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Glenmore Financial, Inc.

Golub Group

Harold Davidson & Associates, Inc

Heller Capital Resources, Inc

Heymont & Company, Inc.

HFM Advisors

Holistic-Solutions

HoyleCohen, LLC

HoyleCohen, LLC

ICMA Retirement Corporation

Integrity Asset Management

Jaffe Asset Management, LLC

Johnson, Harbard, Foster & Darling

Jones Wealth Advisors, LLC

JP Morgan Chase

Kaye Capital Management

KCS Wealth Advisory, LLC

Legacy Financial Group, LLC

Lewis M. Wallensky & Associates

LifeSighted

LPL Financial

Mariposa Capital Management, LLC

Markland Wealth Management, Inc.

MassMutual

McCallister Financial Group

McIntosh Capital Advisors, Inc.

Mercer Global Advisors

Merrill Lynch

Moran, Kimura & Heising, LLC

Morgan Stanley Wealth Management

Morton Capital Management

My Portfolio Guide, LLC

Navalign Wealth Partners

Navigoe, LLC

NerdWallet

Nigro Karlin Segal & Feldstein LLP

NMWMC

Northern Trust

Northwestern Mutual

O'Boyle Wealth Management

Ogden Page Accountancy Corporation

Paragon Financial Partners

Parallution

Pathway Financial Services, LLC

Patriot Wealth Mgmt.

Payden & Rygel

Paylocity

Planned Wealth Consultants

Playa Financial Advisors, Inc.

Posada Adelman, Inc.

Prominence Capital

R Friend Financial

R Watson Financial

RBC Wealth Management

Real Estate Broker Loan Network

Retirement Funding Solutions

RSM Wealth Management

Seta Keshishian

Shrier Wealth Management

Signature Estate & Investment Advisors

Silver Oak Wealth Advisors, LLC

South Western Wealth Management

Strong Wealth Management, LLC

Taylor Wealth Management

The CS Mortgage Group

The Financial Destinations Group

The Kelt Group

The Mather Group

The Northern Trust Company

The Sterling Financial Group

Thrivent

Torrey Pines Bank

Trapani Dickins & Associates

Twelve Squared Associates, LLC

UBS Financial Services

UCLA Extension

URBAN Wealth Management, LLC

VantaQuest

Wallensky Spatz & Associates

Watson Financial

Wellman Realty Company

Wells Fargo Advisors

Wells Fargo Bank, NA

Wescap Management Group

West-Cal Mortgage, Reverse

Westside Financial

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Wetherby Asset Management

William C. Hoeffer Jr. Inc

Williams Wealth Management, Inc.

Windes & McClaughry

Wise Steward Corporation

X and Y Advisors, Inc.

Young & Associates

Zuckerman Capital Management, LLC

ONE CONNECTION™

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About the Financial Planning Association of Los Angeles (FPALA)

The Financial Planning Association® (FPA®) is the leadership and advocacy organization that connects those who need, support, and deliver financial planning. FPA's nearly 100 U.S. chapters represent over 23,000 members nationwide. With over 250 members in the local Los Angeles market alone, the FPA is the definitive community of advisers that fosters the value of financial planning and advances the financial planning profession in our area.

The FPA of Los Angeles offers local events, including monthly Educational Meetings, Quarterly Career Development, Social, and Pro Bono Meetings throughout the Los Angeles Area, where our Partners can showcase their products and services to our members.

Facts About Our Members

1. The FPALA Chapter is one of the largest chapters in the nation. Over 60% of FPA members have remained members for more than five years and more than 35% can claim 10 years or more of membership.
2. Most of us are Financial Planners. Two thirds of current members are practicing financial planners.
3. FPALA is dedicated to the continued advancement of the profession, with nearly 20% of members comprised of students, educators, and planners new to the profession.
4. We represent a diverse set of organizations. Approximately 16% of FPA members work in wirehouses or regional broker/dealers. 56% of FPA Financial Planning members work as Registered Investment Advisers (RIAs). Other members are either dually registered or in the case of educators and students, generally not registered.
5. We are highly educated. 99% of members (excluding student members) have earned a Bachelor’s degree or higher, with 42% of members having earned a Master’s degree or higher.

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2023 Calendar of Events

January:
- 1/11 NexGen Study Group

February:
- 2/8 – NexGen Case Study
- 2/23 –Networking Event

March:
- 3/8 – NexGen Study Group
- 3/23 – Chapter Meeting

April:
- 4/1 – Financial Literacy Day
- 4/12 – NexGen Study Group
- 4/27 – New Member and Board Meeting Breakfast

May:
- 5/10 – NexGen Study Group
- 5/25 –Networking Event
- 5/29 – Advocacy Day in Sacramento

June:
- 6/14 – NexGen Study Group
- 6/22 – Chapter Meeting
- TBD – Federal Advocacy Day

July:
- 7/12 – NexGen Study Group
- 7/27 – New Member and Board Meeting Breakfast

August:
- 8/9 – NexGen Case Study
- 8/24 – Networking Event

September
- 9/13 – NexGen Study Group
- 9/28 – FPALA Summit

October
- 10/11 – NexGen Study Group
- 10/26 – New Member Breakfast
- TBD – Pro-Bono Financial Planning Day

November
- 11/8 – NexGen Study Group
- 11/16 –Networking Event

December
- 12/13 – NexGen Study Group
- 12/21 – Holiday Party

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2023 Chapter Partnership Opportunities

The Partner's Program is designed to provide select, industry-leading firms a venue to work with our members to gain greater coverage in our chapter.

Partners participate in our Bi-Monthly Education Meetings, Monthly Social Events, on our website, and through word-of-mouth by being associated with one of the leading chapters in the country. Optional additional partnership opportunities are spotlighted for our current partners at Allied Professionals events, NexGen events, volunteer appreciation events (which target our most active members), and custom-designed events specifically created with you in mind.

The advantages of being a corporate Partner are multi-faceted, and sponsoring FPALA provides benefits for the Partner and their representatives based on their exposure needs.

$3,000 – Chapter Partnership Benefits

- Company logo and web link on Partner pages of FPA of Los Angeles website for one year
- Complimentary attendance for one company representative at non-capped chapter events for one year (additional representatives at reduced member rate)
- One free non-FPALA guest brought to each non-capped chapter event
- Partners in attendance are recognized at each function
- Presence in a chapter sponsorship page and rolling PowerPoint shown at all chapter meetings
- Includes 1 Summit Registration
- Monthly partnership spotlight email
- 10% discount for all renewing and past partners

$750 – Event Partnership Benefits

- Company logo and web link on all event marketing
- PDF list of all attendees
- Three free event registrations available to partner company

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2023 Summit Partnership Opportunities

The Summit Program is meant to provide FPALA Members and Partners with an opportunity to learn from esteemed professionals and speakers on how to best improve their financial planning practice.

Partners will receive recognition throughout the Summit and will have the opportunity to be recognized for their contribution to the success of the Summit.

The advantages of being a corporate Partner are multi-faceted, and sponsoring FPALA provides benefits for the Partner and their representatives based on their exposure needs.

$7,000 – FPALA Premium Summit Partnership Benefits

- All Gold Partnership Benefits
- Complimentary attendance for two additional company representatives
- Host of Summit Networking post-event

$2,500 – FPALA Platinum Summit Partnership Benefits

- All Gold Partnership Benefits
- Complimentary attendance for one additional company representative
- Speaker sponsorship to be recognized before and after speaker event

$1,500 – FPALA Gold Summit Partnership Benefits

- Company logo on Brochure to be handed out to all participants
- Complimentary attendance for two company representatives
- Table/booth at summit to speak to attending members

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Tips to Maximize Your Partnership

- ✓ Let us know who you would like to develop relationships with. The FPALA board stands ready to assist with **personal introductions**.
- ✓ **Raffle items** (iPad, golf bag, wine…) via a sponsored fishbowl at Bi-Monthly meetings. You are welcome to provide pre-approved items and collect opt-in information via these opt-ins. Then follow-up with members as you work to build & deepen relationships over time. You may also award items based on 'best-answer' to a knowledge-based question you pose to members who have provided a business card.
- ✓ **Sponsor social outings** to continue developing lasting relationships. Costs are $500 per event to the chapter, plus hard costs. FPALA can provide event suggestions: bowling night, business breakfast, movie premieres, go-carting, Scotch tasting, Annual Member Family Picnic, etc.
- ✓ **Sponsor practice-management events** or provide a value-add service (e.g., hosting a 'Social Media Photo-Refresh Day' where members can have headshots taken for social media & LinkedIn profiles). Costs are $500 to the chapter, plus hard costs.
- ✓ Sponsors are encouraged to **socialize regularly with members** at happy hours following the meetings, & to attend chapter meetings on a regular basis.

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CORPORATE PARTNERSHIP COMMITMENT FORM

Basic Information (to be posted on FPALA Website):

Company					
Main Contact					
Email					
Web site URL					
Address					
City		State		Zip	
Phone		Fax			

Three Ways to Secure Your Partnership and Remit Funds:

1. Send this completed form with a check made payable to:
   FPA Los Angeles
   PO Box 4130
   Scottsdale AZ 85261

2. Submit the form via email (admin@fpala.org) or fax (480)922-5283 for an invoice.

3. Simply remit sponsorship funds online at http://fpala.org/Remit-Funds and we will proactively reach out with confirmation of sponsorship.

THANK YOU FOR YOUR SUPPORT!

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