

Financial Planning Association of Hawaii

FPA of Hawaii is a regional chapter of the Financial Planning Association (FPA®), the national leadership and advocacy organization representing the financial planning community. Based in Denver, Colo., FPA represents more than 25,000 members nationwide and is involved in all facets of providing financial planning services and works in alliance with academic leaders, legislative and regulatory bodies, financial services firms and consumer interest organizations.

FPA's Primary Aim is to be the community that fosters the value of financial planning and advances the financial planning profession. Whereas the public expects to experience a high level of confidence, trust and clarity in relationships with professionals trained in the distinct process and discipline of financial planning, it is essential that they obtain a commitment of professional care, quality and excellence in the services they receive.

OUR MISSION

FPA of Hawaii strengthens our community by building an organization of financial professionals dedicated to helping the members/our clients achieve their financial and personal objectives through the financial planning process. We enhance the growth and financial success of our members by providing educational and networking opportunities while upholding the highest standards of ethics and integrity.

PARTNER BENEFITS SUPPORT

Show your support for the planning profession

RECOGNITION

Be recognized at our meetings, events and on our website for your support of our chapter

EXPOSURE

Share your firm and services with our membership; opportunities available to speak at our monthly chapter meetings and during the annual symposium

NETWORKING

Build long-term business relationships

EXHIBITOR SPACE

Exhibitor space is available at our annual symposium

PARTNERSHIP LEVELS

Choose the level you want to partner at

OF THE CURRENT CHAPTER MEMBERS THAT REPORTED:

80 FPA OF HAWAII MEMBERS

Members designations:

80% CFP®
15% ChFC
5% CPA
4% CFA

Members who hold:

51% Series 7
9% Series 6
35% Series 65 or 66

Member insurance licensing:

53% Life Insurance
45% Health Insurance
39% Variable Annuity
37% Fixed Annuity
4% Property

Compensation models:

20% Fee Only
5% Commission Only
75% Both



2024 Rates and Benefits

Symposium Sponsor Levels <i>Attendance: 50</i>	LEHUA \$1,800	HIBISCUS \$1,200	PLUMERIA \$800
50 MINUTE CE PRESENTATION			
5 MINUTE PODIUM INTRO ABOUT YOUR COMPANY	●	●	
PASS TO ALL NETWORKING EVENTS	●	●	
SIGNAGE WITH COMPANY LOGO	●	●	
WEBSITE PRESENCE	●	●	
COMPANY LOGO & REP ON PROMOTIONAL MATERIAL	●	●	
ATTENDEE LIST (NAME, COMPANY, EMAIL, PHONE)	●	●	
EXHIBIT BOOTH	●	●	
SOCIAL MEDIA RECOGNITION FOR EVENTS	●	●	
Monthly Meetings <i>(10 Meetings - 2nd Tues except Dec.)</i> <i>Attendance: 60-80</i>			
50 MINUTE CE PRESENTATION	1		
PODIUM TIME: 10 MINUTE INTRO ABOUT YOUR COMPANY	1		1
SUBMIT RESEARCH/WHITE PAPERS FOR MEMBERS TO DOWNLOAD	2		1
ATTENDEE LIST (NAME, COMPANY, EMAIL, PHONE)	●		●
PASS TO ALL NETWORKING EVENTS	●		●
WEBSITE PRESENCE	●		●
COMPANY LOGO & REP ON PROMOTIONAL MATERIAL	●		●
SOCIAL MEDIA RECOGNITION FOR EVENTS	●		●

*No limit on number of Lehua Partners. Limited number of Hibiscus (Symposium) and Plumeria (Lunch) Partners.

2024 SPONSORSHIP OPPORTUNITIES

Level: Lehua Hibiscus Plumeria

Company: _____ Company Website: _____

Representative: _____ Title: _____

Phone: _____ Email: _____

Billing Contact: _____

Billing Address: _____

City: _____ State: _____ Zip: _____

Date: _____

Payment Method: Check (Payable to: FPA Hawaii) OR Complete online payment form & pay via PayPal

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