

PARTNER BENEFIT REFERENCE GUIDE

13th Annual Financial "Four"um

October 28, 2021

OVERVIEW

The 13th Annual Financial "Four"um on October 28 is a full-day event focused on the future of financial planning and the rapid pace of change in the profession. This year, we're staying virtual with the possibility of watch parties which will be determined in July. We invite you to join CFP®s, attorneys, financial decision makers, accountants, and advisors to learn up-to-date information on technical topics, technology, and management skills. Our goal is to provide our partners with many virtual/online, and possibly in person, benefits throughout the event so that you can engage with attendees the entire day. Our keynote speakers, breakout sessions and panel discussions are being planned and will be soon confirmed. Registration fees will be significantly discounted for FPA and EPC members; CE credits will be made available for almost every session; and we will be continually featuring our partners throughout the day. This *partner reference guide* outlines all the benefits you can expect to receive as a 2021 partner, including applicable deadlines. Benefits may look different this year, but there are more than ever! We look forward to your involvement and participation.

PARTNER BENEFITS OVERVIEW

The 13th Annual Financial "Four"um will be held October 28. Based on our virtual events to date, we anticipate increased attendance for this event. Members from other chapters will also be invited to participate.

In this partner benefit reference guide you will find complete details and deadlines pertaining to your benefits for the 13th Annual Financial "Four"um. Please review and share as appropriate with your marketing team.

Questions? We're here for you! Contact us any time @ (412) 655-4447 / AnnMcKenna@FPAPittsburgh.org

FAQ

- Expected attendance: 150+
- Total partners: tbd
- Total keynote sessions: tbd
- Total CE credits available: tbd
- Event fees: FPA and EPC members \$145
- Non-Members \$175
- Full Time College Students - Free



October 28, 2021

PARTNER PRICING

Keynote - \$5,000 (2 available)

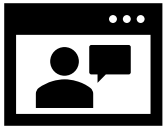
Gold - \$2,750

Silver - \$1,500

- * Keynote Plus - \$5,500
- * Gold Plus - \$3,250
- * Silver Plus - \$2,000

*Depending on circumstances surrounding Covid19 and CDC guidelines, we may schedule "Watch Parties" throughout Pittsburgh and western Pennsylvania. These would make additional partnership opportunities available, noted above as "Plus." The feasibility of these opportunities will be determined in July.

PARTNER BENEFITS OVERVIEW



KEYNOTE PARTNERS may introduce a keynote speaker, present a breakout session and present at a local chapter meeting.

KEYNOTE and GOLD PARTNERS may present a breakout session and introduce a breakout session.

Topics must be in conjunction with topics needed to complete the 2021 "Four"um Program and be approved by the "Four"um committee and chapter program committees. Speaker introductions will be pre-assigned by the event education committee and you will be notified in advance with the speaker name, bio and time slot.

Introductions are typically done by the education committee and/or board of directors, however, we want to give you as much exposure as possible and this is an excellent opportunity to introduce yourself and your company before you lead into the bio and introduction.

Deadline: not applicable. We will notify you in early October of the speaker name, bio, and time slot. If you would like to opt out please let us know in advance.

KEYNOTE, GOLD and SILVER partners will have the opportunity to provide a pre-recorded MP4 file that we will embed in a PPT slide to play between sessions.

Maximum time/length of MP4 file: Platinum partners: 60 seconds, Gold partners: 30 seconds, Silver partners 15 seconds
Details: Please send your company logo. When sending the video please include the name(s), phone #, email and website you would like shown under the video.

Final deadline to submit MP4 file: October 1. Submit to: AnnMcKenna@FPAPittsburgh.org



2 WEBSITES!

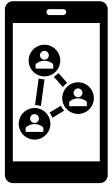
KEYNOTE, GOLD and SILVER partners will be listed on each of the websites. Any visitor will be able to click on your logo to be redirected to your personalized page. There are no restrictions and the content is strictly up to you and can include: text, logo, videos, images.

Final deadline to submit website content: October 1

If content is not received by the deadline, we will link your logo directly to your website.



PARTNER BENEFITS OVERVIEW



VIRTUAL EXHIBIT HALL

October 28

KEYNOTE, GOLD and SILVER partners will each have an assigned virtual exhibit hall room on October 28. Attendees will be able to go in and out of as many as they choose. This is an opportunity for you to showcase your products, services and branding. Suggested content for your exhibit room may consist of interactive discussions on a topic of your choice, specific discount(s) on products or services they only receive by visiting your exhibit room, drawings for door-prizes, invite attendees to a future free webinar, informal chats/discussions, or simply social interaction through a virtual social setting. The set up and content is completely up to you. It will be a requirement that attendees visit the partners in the exhibit hall in order to receive their CE credit.

We will promote the virtual exhibit hall throughout the day and require attendees to visit with you to obtain their CE credits.



Submit questions to: AnnMcKenna@FPAPittsburgh.org



VIRTUAL HAPPY HOUR & NETWORKING

October 28

KEYNOTE, GOLD and SILVER partners are invited to attend the virtual happy hour and networking event that will take place immediately following the closing session on October 28. The content is still being planned, but rest assured, this promises to be a fun interactive event. More to come!

Submit questions to: AnnMcKenna@FPAPittsburgh.org



PARTNER BENEFITS OVERVIEW



ATTENDEE LIST and REGISTRATIONS

Partners will be provided with the list of attendees, along with guidelines on usage of the list, the week prior to the event.

Keynote partners receive 4 event registrations.

Gold partners receive 3 event registrations.

Silver partners receive 2 event registrations.

PARTNER PRICING

Keynote - \$5,000 (2 available)

Gold - \$2,750

Silver - \$1,500

*Keynote Plus - \$5,500

*Gold Plus - \$3,250

*Silver Plus - \$2,000

*Depending on circumstances surrounding Covid19 and CDC guidelines, we may schedule "Watch Parties" throughout Pittsburgh and western Pennsylvania. These would make additional partnership opportunities available, noted above as "Plus." The feasibility of these opportunities will be determined in July.



It is our hope that you are willing to commit as a partner of this event in this new format. Please feel free to contact Ann McKenna at AnnMcKenna@FPAPittsburgh.org or (412) 655-4447 with any questions or concerns.

We appreciate your flexibility during these uncertain times and look forward to having you join us for the 13th Annual Financial "Four"um.