

# PARTNER BENEFIT REFERENCE GUIDE

## 12th Annual Financial "Four"um

October 28 & 29, 2020



### OVERVIEW

The 12th Annual Financial "Four"um on October 28 and 29 is a two-day event focused on the future of financial planning and the rapid pace of change in the profession. This year, we're going virtual! 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 benefits throughout the event so that you can engage with attendees over both days. To increase attendance and engagement, we are hosting nationally acclaimed speaker *Natalie Choate* as our opening keynote; Panel discussions and breakouts; Registration fees will be significantly discounted for FPA, EPC, FSP and NAIFA members; CE credits will be made available for every session; and we will be continually featuring our partners throughout both days, to include in a virtual exhibit hall. This *partner reference guide* outlines all the benefits you can expect to receive as a 2020 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 12th Annual Financial "Four"um will be held October 28 & 29. Based on our ZOOM 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 12th Annual Financial "Four"um. Please review and share as appropriate with your marketing team.

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

## FAQ

- Expected attendance: 150+
- Total partners: 10
- Total keynote sessions: 5
- Total CE credits available: 7
- Event fees: FPA/EPC/FSP/NAIFA members \$99
- Non-Members \$149



October 28 & 29, 2020

# PARTNER BENEFITS OVERVIEW



## SPONSOR SPOTLIGHT

Each partner will have the opportunity to provide a pre-recorded MP4 file that we will embed in a PPT slide to play between sessions.

Example of final slide (format may change):



Final deadline to submit MP4 file: October 13

Submit to: [AnnMcKenna@FPAPittsburgh.org](mailto:AnnMcKenna@FPAPittsburgh.org)

Maximum time/length of MP4 file: Platinum partners: 2 minutes, Gold partners: 1.5 minutes, Silver partners 1 minute

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.



## 4 WEBSITES!

Each partner will be listed on each of the 4 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.

Need ideas? Following is an example of content used on the FPA of Michigan Symposium website:

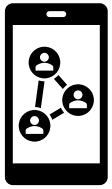
Vanguard: <https://bit.ly/2BSUgF4>

Final deadline to submit website content: October 13

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



# PARTNER BENEFITS OVERVIEW



## VIRTUAL EXHIBIT HALL

October 29

Platinum & Gold partners will each have an assigned virtual exhibit hall (ZOOM room), directly after the closing keynote session on **October 29**. The virtual exhibit hall will last for 60 minutes and 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 'ZOOM 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 ZOOM room, drawings for door-prizes, invite attendees to a future free webinar, informal chats/discussions, or simply social interaction through a virtual happy hour setting. The set up and content is completely up to you.



In full disclosure, we are still new to this format, but learning more every day. We will be sharing details on how to access your room and how traffic will flow. We will promote the virtual exhibit hall throughout the day and strongly encourage attendees to visit with you, however, attendance numbers are unknown so we cannot forecast how many attendees will visit your room.

**Deadline: not applicable**

Submit questions to: [AnnMcKenna@FPAPittsburgh.org](mailto:AnnMcKenna@FPAPittsburgh.org)



## VIRTUAL HAPPY HOUR & NETWORKING

October 28

All partners are invited to attend the virtual happy hour and networking event that will take place immediately following the closing keynote on October 28. Understanding that ZOOM happy hour burnouts are REAL! We intend to "shake things up" a bit!

The content is still being planned, but rest assured, this promises to be a fun interactive event. Some ideas we are looking at include a mixologist demonstration, live music, and more. Our goal is to implement sponsor spotlights for our Platinum partners during this hour as well. More to come!

**Deadline: not applicable**

Submit questions to: [AnnMcKenna@FPAPittsburgh.org](mailto:AnnMcKenna@FPAPittsburgh.org)





# PARTNER BENEFITS OVERVIEW



## SPONSOR RAFFLES

## ONLINE RAFFLE

Every partner will have the opportunity to do an online raffle. This is a great way to collect virtual 'business cards' and contact information from the attendees. Any entries are contacts that you can keep to follow up with later, and no restrictions will apply given the fact that all entries are an exception to event's privacy policy. This benefit is completely optional. Based on our research, we have found that this concept has been extremely successful for other chapters and has provided the partners with many great leads and follow up contacts.

A link to the online raffle must be provided by you - this can be done in SurveyMonkey or any other online platform. You will give out the link when you do your live raffle.

The door prize does not need to be sent to Ann and should be mailed directly by the partner to the winner following the event.

**Deadline: let us know by October 1 if you will be participating so we can schedule a time slot for your drawing**



## INTRODUCE A SPEAKER

**Platinum & Gold** partners will be asked to introduce a speaker during the event. Platinum partners will be allowed to introduce up to 2 speakers, and Gold partners will be allowed to introduce 1 speaker. 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.**



# PARTNER BENEFITS OVERVIEW



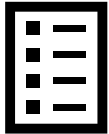
## ATTENDEE LIST

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

**Deadline: not applicable. This will automatically be sent out to you.**

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## PRICING



Platinum - \$4,250

Gold - \$1,750

Silver - \$750

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](mailto: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 12th Annual Financial "Four"um.