



NORTHEASTERN NEW YORK CHAPTER

April 12, 2021

To: Chapter Partners
From: FPA-NENY
Subject: Symposium Partner Reference Guide

Although we had all hoped to return to our fabulous in-person events, obviously we can't do so just yet. Our Symposium WILL proceed, albeit virtually, on Thursday, May 13, 2021. This document outlines all the benefits you can expect to receive as a 2021 partner, including applicable deadlines. Benefits may look different this year, but we look forward to your involvement and participation.

PARTNER SPOTLIGHT

Each partner will have the opportunity to provide a pre-recorded MP4 file that we will embed into a PowerPoint slide to play between sessions and during the lunch break. We will include the logo we have on file for your company. When sending the video please include the name(s), phone #, email and website you would like shown under the video.

Maximum time/length of MP4 file: Gold partners: 2 minutes, Silver partners: 1.5 minutes, Bronze partners: 1 minute. **Final deadline** to submit MP4 file: May 4, 2021 (by 5:00 pm EST)

PARTNER RAFFLES

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 FPA'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. Submit the link to us and we will forward it to attendees during the event. For those who wish, you can pull the ticket "virtually live" at the conclusion of the last session.

The door prize does not need to be sent to FPA and should be mailed directly by the partner to the winner following the event. **Deadline:** let us know by May 4 if you will be participating.

PARTNER NEWSLETTER

Your branding is a crucial part of your success and FPA is proud to partner with you! We will create a new Partner Newsletter that will be emailed to all FPA NENY members AND guests, highlighting your company and support of our Chapter, while encouraging our members to engage with your brand.

Deadline: not applicable – we will gladly take care of this! BUT - **if you want to include** a personal message, limit it to 150 words and **submit to Stephanie by May 4, 2021.**

ATTENDEE LIST

Partners will be provided with the list of attendees, along with guidelines on usage of the list, for those registered by May 4, 2021 and an update just prior to the event. **Deadline:** not applicable. This will automatically be sent out to you.

For this event, we are NOT offering a Virtual Exhibit Hall nor Virtual Happy Hour/Networking. The FPA Chapters that have tried these ideas have reported little to no interest/participation; we don't want to waste anyone's time. We will be keeping the Zoom live during lunch for anyone who wishes to attend.

If you know of a benefit that is not listed, but know will work, please tell us and we'll see if we can make it happen!

	The Day's Schedule - course descriptions are on our WEBSITE
Zoom opens at 7:30am	<i>Partners may (quickly) introduce their speaker.</i>
1: 8:00 - 8:50am	Power Brand , Sheridan Culhane , MFS
2: 9:00 - 9:50am	Positioning for the Next Economic Cycle , Brian Levitt , Invesco
3: 10:00 - 10:50am	Ongoing Soap Opera of Health Care Reform , Dr. Carolyn McClanahan , Life Planning Partners
4: 11:00 - 11:50am	Navigating the New Insurance World for Optimal Client Plans , Bob Vandy , AIB
LUNCH - Zoom remains open	
5: 1:00 - 1:50pm	Bridging the Relational Finance Gap: How to be more productive and profitable while advising married clients with relationship challenges , Dr. Travis Parry , Live Life on Purpose
6: 2:00 - 2:50pm	Responsible Investing is Good Business , Lenore Reiner , Eaton Vance
7: 3:00 -- 3:50pm	Planning Options Under the SECURE Act , Lou Pierro , Pierro, Connor & Strauss
RAFFLES	

Please feel free to contact Stephanie Cogan at info@fpa-neny.org or (518) 458-7774 with any questions or concerns. We appreciate your flexibility during these uncertain times and look forward to having you join us for the 2021 Symposium.

And, finally, while we have become quite comfortable and proficient with Zoom meetings, hosting seven meetings in one day is a tall order, so we greatly appreciate your patience and flexibility.

Thank you, as always, for your support!