



**FINANCIAL  
PLANNING  
ASSOCIATION**

LOS ANGELES

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**

## **2021 Corporate Partners Program**



**NETWORKING**

**FINANCIAL  
PLANNERS**

**SEMINARS  
& EVENTS**

For more information about Partnership Opportunities with FPALA, please contact

David Tassone at [dtassone@kayecapital.com](mailto:dtassone@kayecapital.com) | 310-733-8386



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## FPA of Los Angeles 2021 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	BNG Accountancy Corporation	Charlesworth & Rugg, Inc.
Abbot Downing	Britt & Associates	Chubb
Acacia Wealth Advisors	Bruce Colin	City National Bank
AG Asset Advisory, LLC	California Retirement Advisors	CSU Northridge
American California Financial Services, Inc	Caliber Home Loans	CLG Wealth Management
American Financial Network	California Retirement Advisors	Cook and Associates
American Heart Association Charitable Estate Planning	Cantor Fitzgerald Capital	Covington Capital Management
Ameriprise Financial Services, Inc.	Capital Group	Cue Financial Group Inc.
Anora Tadjikhodjaeva	Capital Guardian Trust Company	Dorsey Wealth Management
Aqua Capital Advisors	Capital Intelligence Associates	DRM WEALTH MANAGEMENT
Argos Wealth Advisors	Captrust	Edward D Jones & Co
Aspiriant	Cerda Munoz Advisors, Inc.	EP Wealth Advisors, LLC
AXA Advisors, LLC	Cetera Advisor Networks LLC	Fidelity Investments
Bank of The West	Cetera Financial Group	Financially Wise Women
Baroda Ventures LLC	Charles E. O'Connor	Foundry Financial
Barrett Planning Group, Inc.	Charles Schwab Advisor Services	Fraser Financial Group
	Charles W. Mason & Associates	Gerber Kawasaki Wealth & Investment Management

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Glenmore Financial, Inc.	Morgan Stanley Wealth Management	Seta Keshishian
Golub Group	Morton Capital Management	Shrier Wealth Management
Harold Davidson & Associates, Inc	My Portfolio Guide, LLC	Signature Estate & Investment Advisors
Heller Capital Resources, Inc	Navalign Wealth Partners	Silver Oak Wealth Advisors, LLC
Heymont & Company, Inc.	Navigoe, LLC	South Western Wealth Management
HFM Advisors	NerdWallet	Strong Wealth Management, LLC
Holistic-Solutions	Nigro Karlin Segal & Feldstein LLP	Taylor Wealth Management
HoyleCohen, LLC	NMWMC	The CS Mortgage Group
HoyleCohen, LLC	Northern Trust	The Financial Destinations Group
ICMA Retirement Corporation	Northwestern Mutual	The Kelt Group
Integrity Asset Management	O'Boyle Wealth Management	The Mather Group
Jaffe Asset Management, LLC	Ogden Page Accountancy Corporation	The Northern Trust Company
Johnson, Harbard, Foster & Darling	Paragon Financial Partners	The Sterling Financial Group
Jones Wealth Advisors, LLC	Parallution	Thrivent
JP Morgan Chase	Pathway Financial Services, LLC	Torrey Pines Bank
Kaye Capital Management	Patriot Wealth Mgmt.	Trapani Dickins & Associates
KCS Wealth Advisory, LLC	Payden & Rygel	Twelve Squared Associates, LLC
Legacy Financial Group, LLC	Paylocity	UBS Financial Services
Lewis M. Wallensky & Associates	Planned Wealth Consultants	UCLA Extension
LifeSighted	Playa Financial Advisors, Inc.	URBAN Wealth Management, LLC
LPL Financial	Posada Adelman, Inc.	VantaQuest
Mariposa Capital Management, LLC	Prominence Capital	Wallensky Spatz & Associates
Markland Wealth Management, Inc.	R Friend Financial	Watson Financial
MassMutual	R Watson Financial	Wellman Realty Company
McCallister Financial Group	RBC Wealth Management	Wells Fargo Advisors
McIntosh Capital Advisors, Inc.	Real Estate Broker Loan Network	Wells Fargo Bank, NA
Mercer Global Advisors	Retirement Funding Solutions	Wescap Management Group
Merrill Lynch	RSM Wealth Management	West-Cal Mortgage, Reverse
Moran, Kimura & Heising, LLC		Westside Financial

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Wetherby Asset Management

William C. Hoeffler Jr. Inc

Williams Wealth Management, Inc.

Windes & McClaughry

Wise Steward Corporation

X and Y Advisors, Inc.

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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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## 2021 Calendar of Events

### **January:**

- 1/13 NexGen Study Group - Networking
- 1/28 Optimize U: The Tools and Neuroscience of Peak Performance

### **February:**

- 2/17 NexGen Study Group – Investing Mentality
- 2/25 Diversity in the Workplace

### **March:**

- 3/17 NexGen Study Group - Taxes
- 3/25 New Member and Board Member Breakfast

### **April:**

- 4/21 NexGen Study Group – Climbing the Corporate Ladder/ Compensation
- 4/22 Clients in Transition

### **May:**

- 5/21 NexGen Study Group – Case Study: Retirement Failure
- 5/27 National Economic Education Delegation

### **June:**

- 6/16 NexGen Study Group – Approach to Discovery Meeting
- TBD Chapter Meeting

### **July:**

- 7/21 NexGen Study Group – Technology
- TBD Chapter Meeting

### **August:**

- 8/18 NexGen Study Group – Case Study: Individual 401(k) vs. SEP IRA
- TBD Chapter Meeting

### **September**

- 9/15 NexGen Study Group - How to Give Back to Community
- TBD New Member and Board Meeting Breakfast
- TBD Women in Finance

### **October**

- 10/20 NexGen Study Group – CFP Process
- TBD Chapter Meeting
- TBD Pro-Bono Financial Planning Day

### **November**

- 11/17 NexGen Study Group – Case Study: Debt Reduction
- TBD Chapter Meeting

### **December**

- 12/15 NexGen Study Group – Holiday Party
- TBD Chapter Meeting



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## 2021 Partnership Opportunities

The Partners 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.

### **\$2,500 – 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 ALL chapter meetings for one year (additional representatives at reduced member rate)
- Partners in attendance are recognized at each function
- Presence in a chapter sponsorship page and rolling PowerPoint shown at all chapter meetings
- 10% discount for all renewing and past partners
- Includes 1 Symposium Registration
- Firm introduction at Symposium
- Monthly partnership spotlight email

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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 actual costs. FPALA can provide event suggestions: bowling night, business breakfast, movie premieres, go-carting, Scotch tasting, Annual Member Family Picnic...
- ✓ **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.



## 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](mailto: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!**