



**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

2024 Corporate Partners Brochure



NETWORKING



**FINANCIAL
PLANNERS**



**SEMINARS
& EVENTS**

For more information about Partnership Opportunities with FPALA, please contact

David Tassone at dtassone@kayecapital.com | 424-321-7013



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

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

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Westside Financial

Wetherby Asset Management

William C. Hoeffler Jr. Inc

Williams Wealth Management, Inc.

Windes & McClaughry

Wise Steward Corporation

X and Y Advisors, Inc.

Young & Associates

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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 300 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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2024 Calendar of Events

January:

- 1/10 – NexGen Study Group
- 1/20 – Hike + Brunch

February:

- 2/14 – NexGen Study Group
- 2/15 – Westside Networking Event

March:

- 3/12 – FPA CA Advocacy Day (Sacramento)
- 3/13 – NexGen Study Group
- 3/21 – Q1 Educational Event

April:

- 4/10 – NexGen Study Group
- 4/13 – Financial Literacy Day
- 4/25 – New Member and Board Meeting Breakfast

May:

- 5/8 – NexGen Happy Hour
- 5/16 – Valley Networking Event

June:

- 6/20 – Q2 Educational Event - Ethics
- TBD – Federal Advocacy Day

July:

- 7/10 – NexGen Study Group

August:

- 8/9 – NexGen Case Study
- 8/15 – West LA Pickleball Tournament
- 8/22 – FPALA/CFALA/CA CPA Mixer

September

- 9/26 – FPALA Summit

October

- 10/19 – Pro-Bono Financial Planning Day
- 10/26 – NexGen SoCal Summit

November

- 11/13 – NexGen Study Group
- 11/21 – South Bay Networking Event

December

- 12/11 – NexGen Study Group
- 12/12 – Holiday Party



2024 Chapter Partnership Opportunities

The Partner's 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.

\$3,000 – 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 non-capped chapter events for one year (additional representatives at reduced member rate)
- One free non-FPALA guest brought to each non-capped chapter event
- Partners in attendance are recognized at each function
- Presence in a chapter sponsorship page and rolling PowerPoint shown at all chapter meetings
- Includes 1 Summit Registration
- Monthly partnership spotlight email
- 10% discount for all renewing and past partners

\$1,000 – Event Partnership Benefits

- Company logo and web link on all event marketing
- PDF list of all attendees
- Three free event registrations available to partner company

For more information about Partnership Opportunities with FPALA, please contact

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2024 Summit Partnership Opportunities

The Summit Program is meant to provide FPALA Members and Partners with an opportunity to learn from esteemed professionals and speakers on how to best improve their financial planning practice.

Partners will receive recognition throughout the Summit and will have the opportunity to be recognized for their contribution to the success of the Summit.

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.

\$6,000 – FPALA Platinum Summit Partnership Benefits

- All Gold Partnership Benefits
- Complimentary attendance for two additional company representatives
- Premiere marketing and company recognition throughout event
- Host of Summit Networking post-event

\$4,000 – FPALA Gold Summit Partnership Benefits

- All Silver Partnership Benefits
- Complimentary attendance for one additional company representative
- Reserved speaking opportunity for the event

\$2,000 – FPALA Silver Summit Partnership Benefits

- Company logo on Brochure to be handed out to all participants
- Complimentary attendance for two company representatives
- Table/booth at summit to speak to attending members

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

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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) 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!