

**FPA**  
FINANCIAL  
PLANNING  
ASSOCIATION

OF SOUTHWEST FLORIDA



**November Symposium  
Hyatt Regency Coconut Point  
November 10, 2017**

# FPA-SWFL NOVEMBER SYMPOSIUM

Hyatt Regency Coconut Point  
Friday, November 10, 2017  
7:45am - 6:30pm

This one-day educational event in beautiful Southwest Florida will feature high-quality presentations about recent developments in the financial services field from regional and national experts. The November Symposium is thoughtfully designed to equip attendees with new information, practical advice and relevant skills necessary to stay competitive in a regionally thriving financial services industry.

As a Symposium partner, you have the opportunity to gain direct contact with decision makers in your target market. The FPA-SWFL has a progressive Symposium marketing plan that aims to secure up to 200 attendees and broaden its overall brand awareness. This event will also provide continuing education credits for professionals in several areas of practice.

## Tentative Symposium Schedule

7:45am - 8:30am	REGISTRATION/BREAKFAST
8:30am - 8:45am	Opening Remarks by Mark Matos, CFP®, CLU, President of the Financial Planning Association of Southwest Florida and the Symposium Title Sponsor (TBD)
8:45am - 9:45am	Session I: Robert Mauterstock, "7 Steps to Protect Yourself, Your Practice and Your Clients Who Have Diminished Mental Capacity"
9:45am - 10:45am	Session II: Annalee Kruger, "Helping Clients Budget for Elder Care Costs"
10:45am - 11:00am	BREAK
11:00am - 12:00pm	Session III: Ed Wollman, "Succession Planning"
12:00pm - 1:00pm	LUNCH
1:00pm - 2:00pm	Session IV: Josh Davis, "Preparing to Win and Performing Under Pressure"
2:00pm - 3:00pm	Session V: Bob Veres, "The New Profession"
3:00pm - 3:15pm	BREAK
3:15pm - 4:15pm	Panel Presentation: Presenters TBA
4:15pm - 5:15pm	Session VI: Debbie Peterson, "The Mindset of Successful Retirement"
5:15pm - 5:30pm	Closing Remarks by Mark Matos, CFP®, CLU, President of the Financial Planning Association of Southwest Florida
5:30pm - 6:30pm	COCKTAIL RECEPTION

## TICKETS:

### BEFORE SEPTEMBER 1, 2017

Member - \$175  
Non-Member Guest - \$250  
3 or More Guests - \$125/each  
Student Guest - \$100

### AFTER SEPTEMBER 1, 2017

Member - \$250  
Non-Member Guest - \$350  
3 or More Guests - \$200/each  
Student Guest - \$100

Entry includes access to all presentations, exhibitors, breakfast, lunch, breaks and cash bar cocktail hour.

# Symposium 2017 Sponsorship Opportunities

## Presenting Sponsor - \$3,000 (Limit Six Opportunities)

- Opportunity to introduce one speaker of your choosing
- Inclusion of logo on all promotion material
- Email announcements will feature your logo and a direct link to your company website
- Logo featured on the event webpage and printed event program
- Logo featured on event webpage
- 1 pre-event post on Facebook
- 1 pre-event post on LinkedIn
- 2 complimentary registrations
- Company signage displayed throughout the event
- 1 exhibitor booth (see below)
- Business name included in press announcement

## Exhibitor (Booth) Sponsor - \$1,500

- 1 exhibitor space for entire conference, 6 foot draped table with one chair
- Link to your company's website on event webpage
- 1 complimentary registration
- Business name listed on the event program

## Breakfast Sponsor - \$2,000 (Limit One Opportunity)

- Introduction and 5 minute remarks at breakfast
- 1 exhibitor booth (see above)
- Link to your company's website on event webpage
- 1 complimentary registration
- Logo featured on the event program

## Lunch Sponsor - \$2,500 (Limit One Opportunity)

- Introduction and 5 minute remarks at lunch
- 1 exhibitor booth (see above)
- Link to your company's website on event webpage
- 1 complimentary registration
- Logo featured on the event program

## Cocktail Sponsor - \$2,500 (Limit One Opportunity)

- Introduction and 5 minute remarks during the cocktail hour
- 1 exhibitor booth (see above)
- Link to your company's website on event webpage
- Company name included in press announcement
- 1 complimentary registration
- Logo featured on the event program

## Break Sponsor - \$500 (Limit Two Opportunities)

- Introduction and 3 minute remarks during a refreshment break
- 1 complimentary registration

## Bag Sponsor - \$250 (Limit Four Opportunities)

- Company logo placed on commemorative bags to be given out during the event

## Student Sponsor - \$100

- Help us engage the future of our industry by covering the cost of attendance for one or many student guests

**Donate a Door Prize!**  
Must be \$50 or more in value.

Simply bring the gift to the registration desk at the Symposium.

**SECURED**

