

YOUR PARTNERSHIP OPPORTUNITIES



FINANCIAL
PLANNING
ASSOCIATION

SOUTH CAROLINA

We are thrilled about your interest in helping us deliver a first-class member experience. A partnership with you will provide us with a wealth of opportunities including the ability to bring in nationally recognized speakers. What this means for you as a partner of FPASC is that you will enjoy a vast exposure to more financial planning professionals. Our mission is to serve our members by providing educational, networking and mentoring opportunities, representing their professional interests to the government, and promoting the value of financial planning to the public. We strive to offer superior resources and opportunities to our members, and partnerships are critical to the ongoing success of our organization and mission. By partnering with the FPASC, you will have direct access to financial services professionals in South Carolina. Our members include financial planners, brokers, insurance professionals, attorneys, CPAs, trust specialists, banking professionals and more – all dedicated to providing the most valuable products, services and advice to the clients they serve.

Recognition as a chapter partner will allow you to sponsor our organization and reinforces your commitment to the success and growth of our membership, as well as the financial planning profession. In addition to receiving recognition at our chapter meetings and events, you will have the opportunity to make connections, build relationships, engage in conversation, and exchange knowledge with key decision makers in the financial planning industry in the state.

Should you have questions, please contact one of the Partnership Committee Members:

Wes Johnson | wes.johnson@lpl.com

Bobby Cummings | bobby@cummingswealth.com

Chris Cabri | chris.cabri@wellfargo.com

William Hardaway | whardaway@wrfasc.com

Ready to sign up?

Visit www.fpasouthcarolina.org

Partner Benefits

Leading Partners \$3,500

Limited to 2

- Option to propose a topic/speaker for the Annual Symposium
- Exclusive sponsor of three (3) Lunch & Learns**
- Booth at Annual Symposium
- Five (5) complimentary Symposium registrations to be given to clients
- Fifteen (15) complimentary Lunch & Learn registrations to be given to clients
- Annual pass for two (2) representatives to attend all Chapter events
- Recognition during all Chapter events
- Feature article in one (1) newsletter
- Full-page Ad in one (1) Chapter newsletter
- Opportunity for FPA of SC to market any educational offerings by your company

Impact Partners \$1,500

- Booth at Annual Symposium
- Five (5) complimentary Symposium registrations to be given to clients
- Five (5) complimentary Lunch & Learn registrations to be given to clients
- Annual pass for one (1) representative to attend all Chapter events
- Recognition during all Chapter events
- Feature article in one (1) newsletter
- Quarter-page Ad in one (1) Chapter newsletter
- Opportunity for FPA of SC to market any educational offerings by your company

Collaborating Partners \$2,500

Limited to 3

- Option to propose a topic/speaker for a Regional Lunch & Learn*
- Exclusive sponsor of two (2) Lunch & Learns**
- Booth at Annual Symposium
- Five (5) complimentary Symposium registrations to be given to clients
- Ten (10) complimentary Lunch & Learn registrations to be given to clients
- Annual pass for two (2) representatives to attend all Chapter events
- Recognition during all Chapter events
- Feature article in one (1) newsletter
- Half-page Ad in one (1) Chapter newsletter
- Opportunity for FPA of SC to market any educational offerings by your company

Community Partners \$750

- Booth at Annual Symposium
- Quarter-page Ad in one (1) Chapter newsletter

All special options must be chosen when completing the PARTNER FORM

*Program committee will have final approval of all topics/speakers

**First-come/First-Served



2024 EVENTS

Regional Networking Events

Get to know the members of the South Carolina chapter of FPA during casual gatherings across the state.

Regional Lunch & Learns

Take the opportunity to visit with potential clients over lunch in Charleston, Columbia, and Greenville.

Annual Symposium

The largest event for our Chapter affords you the opportunity to connect with members and potentially provide topics and speakers.

CHAPTER DEMOGRAPHICS

76%

cfp professionals

67%

state registered rias

34%

sec registered rias

28%

life insurance license

29%

health insurance license

25%

series 7

22%

variable annuity license

TYPES OF PRACTITIONERS

Accountant
Attorney
Banking Professional
Broker-Stockbroker Registered Rep
Financial Planner
Insurance Professional
Investment Manager
Retirement Planning Professional



2024 EVENTS

Q1

- Jan 11 Board Meeting
- Jan 17 Lunch & Learn | Charleston
- Feb 21 Lunch & Learn | Columbia
- Mar 14 Board Meeting
- Mar 20 Lunch & Learn | Greenville

Q2

- Apr 17 Lunch & Learn | Charleston
- May 9 Board Meeting
- May 15 Lunch & Learn | Columbia
- June 19 Lunch & Learn | Greenville

Q3

- July 11 Board Meeting
- July 17 Lunch & Learn | Charleston
- Aug 21 Lunch & Learn | Columbia
- Sep 11 Lunch & Learn | Greenville
- Sep 30 Board Retreat
- Sep 30 Symposium Reception

Q4

- Oct 1 Symposium
- Oct 16 Lunch & Learn | Charleston
- Nov 13 Board Meeting
- Nov 14 Lunch & Learn | Columbia
- Dec 11 Lunch & Learn | Greenville

2024 LEADERS

President

Bobby Cummings

President- Elect

William Hardaway

Past-President

David Chudyk

Treasurer

Will Kibler

Directors

John Cooper
Rob DeHollander
Nancy Fellingner
Justin Follmer
Wes Johnson
Carman Franklin
Peter Pigeon

Executive Director

Nancye Bailey

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