



Financial Planning of Institute of Southern Africa

2022 FPI Sponsorship Prospectus





About Us

The Financial Planning Institute of Southern Africa (FPI) is a South African Qualifications Authority recognised professional body for financial planners in South Africa.

As a non-profit professional body, founding and affiliate member of Financial Planning Standards Board (FPSB), the Institute exists to improve the level of professionalism and positively influence the quality of advice provided by its members. There are 27 other affiliate member countries who offer the CFP® certification.



VISION

Professional financial planning and advice for all

MISSION

The FPI's mission is to advance and promote the pre-eminence and status of financial planning and advice professionals, while at all times acting in the interests of the society (community, constituency) whom the profession serves.



Profile of Audience



Members

The FPI has over 6 000 professional members who operate within a wide range of sectors in the financial services industry which includes the life industry, banking, asset management and investment industries as well as other providers of financial planning products, tools and services.

The largest portion of members are CERTIFIED FINANCIAL PLANNER® professionals. The CFP® mark is the highest professional designation a person operating in the financial planning industry can achieve.

The audience includes:

- Specialist members who are practicing or non-practicing
- Managerial positions
- Employee benefits
- Tax
- Investment
- Health

Non-members

A large portion of non-members who attend FPI events are from the financial services industry who are practicing independent financial advisors, senior industry representatives from:

- Various large corporate financial service provider companies
- Education providers
- Products providers and services
- Media
- Representatives from other key stakeholders.

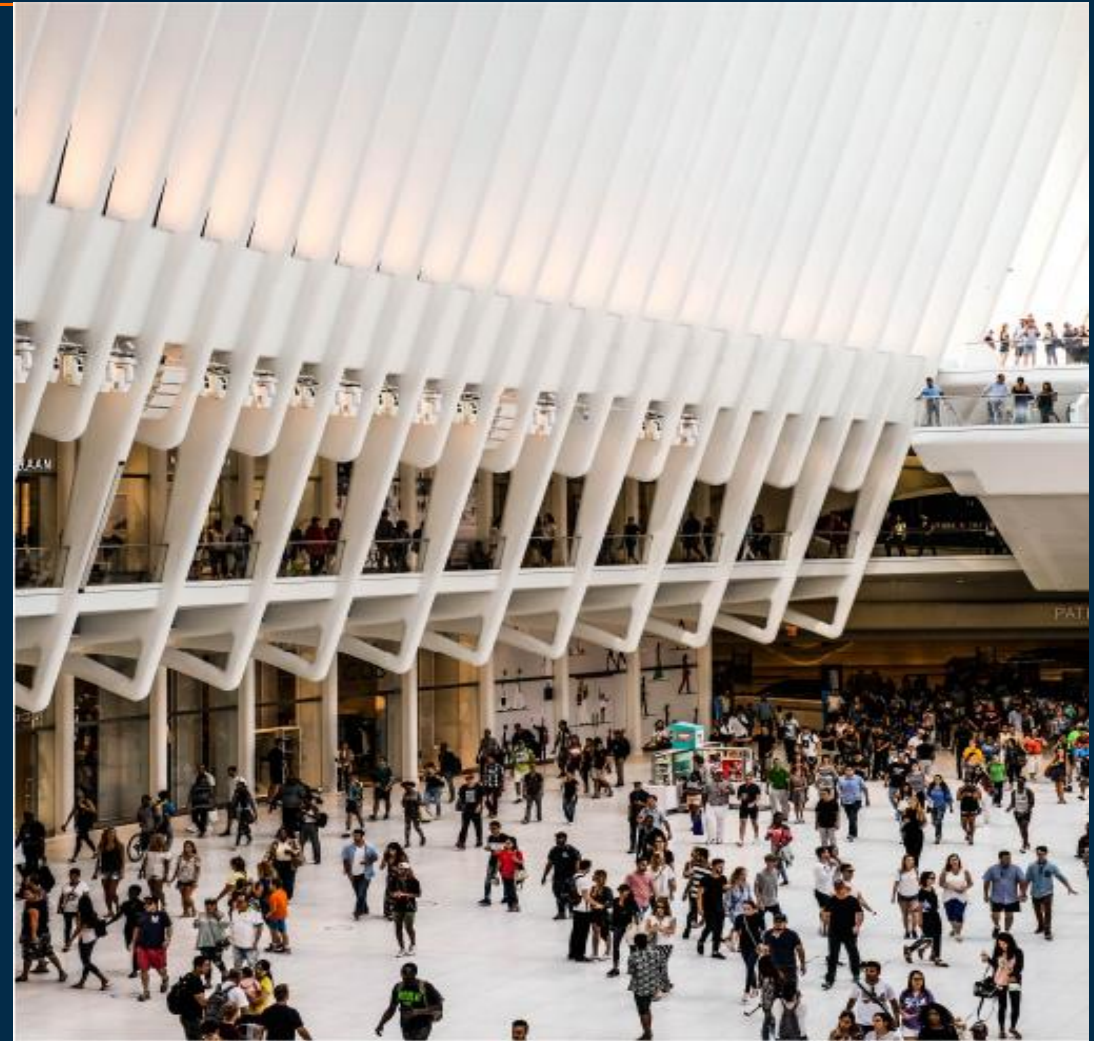
2022 FPI Convention

2022 will mark our 33rd Professional's Convention. This event is regarded as the largest and most significant event in the calendar for financial planning professionals.

The Convention has a proud history of hosting the best local and international speakers on topics that add value to financial planners and advisors.

The FPI's Professionals Convention hosts in excess of 1000 delegates and is advertised on various media platforms.

When partnering with us you can be assured of prestigious brand exposure via our various marketing platforms. Our social media platforms reach over 50 000 individuals.



FPI Convention sponsorship options

Please note: Should an in-person event not be possible due to Covid-19 restrictions, the options for sponsorship at the live event will no longer be applicable and will not be replaced with another offering

Headline Sponsorship R 550 000

Entitlements

- Speaking slot relevant to Convention theme
- Co-Branding together with FPI on Convention logo on all FPI marketing social media platforms.
- Branding included all pre- and post-convention communication
- Full page advert in Convention magazine
- Article in Convention magazine with bio and photo of speaker from sponsored session.
- Post-convention analytics report.

At the convention venue:

- Six 30 second advertorial/video's
- A 3mx3m exhibition stand space
- 5 Full Face-to-Face Convention tickets

FPI Virtual convention platform:

- A 3D Premium virtual exhibition space
- Attendee gamification points awarded 750 points for visiting the virtual stand towards overall FPI awarded prize for top 3 most engaged attendee.
- Upload of product information of 2 video and 2 pdf brochures to the stand
- Branding exposure on 3 scrolling banners on the homepage of the virtual platform
- 10 Full Virtual convention tickets

FPI Gala Dinner Awards Sponsorship

R250 000.00

Entitlements

- Co-Branding on all FPI Gala Dinner Awards marketing and communication

At the convention venue:

- Welcome address for awards evening.
 - Opportunity to provide branded gifts to guests.
 - Complimentary VIP top table at the gala dinner.
 - Co-Branding of formal invitation, menu, and events order where applicable.
 - Co-Branding of awards event holding slides.
 - Recognition by CEO of FPI at the awards evening.
 - Co-Branding on presentation delivered by the newly awarded Financial Planner of the Year on day 2 of the convention.
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Registration Desk Sponsor (Home Page)

R150 000.00

At the convention venue:

- Co-branding of the registration desk at the convention
- 3min promo video as part of the programme

FPI Virtual convention platform:

- A 3D business stand within the virtual exhibition space
 - Attendee gamification points awarded 300 points for visiting the virtual stand towards overall FPI awarded prize for top 3 most engaged attendee.
 - Upload of product information of 1 video and 1 pdf brochures to the stand.
 - Branding exposure on the main banner on the homepage of the virtual platform.
 - 2 Full virtual convention tickets
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Bag, Badge and Lanyard Sponsor

R150 000.00

At the convention venue:

- Co-branding on delegate lanyard
- 3-minute promo video as part of the programme

FPI Virtual convention platform

- Co-branding on attendee login letter and acknowledgement
- A 3D business stand within the virtual exhibition space
- Attendee gamification points awarded 150 points for visiting the virtual stand towards overall FPI awarded prize for top 3 most engaged attendee.
- Upload of product information of 1 video and 1 pdf brochures to the stand.
- Branding exposure on 1 scrolling banners on the homepage of the virtual platform
- 2 Full virtual convention tickets



Face to Face Exhibition Stand

R40 000.00

At the convention venue:

A 3m x 3m Fabric Booth including the following

- Plug point; Fascia banner; Long arm light
- 2 Full Face-to-Face Convention tickets

FPI Virtual convention platform:

- A 3D standard stand within the virtual exhibition space
- Attendee gamification points awarded 100 points for visiting the virtual stand towards overall FPI awarded prize for top 3 most engaged attendee.
- Upload of product information of 1 video and 1 pdf brochures to the stand.
- 2 Full virtual convention tickets

Please note:

- Exhibition space at the convention venue is limited to a max of 10 stands
- Company design and branding on panels and counter are not included
- Furniture and other items not specified
- If convention goes fully virtual: You will be entitled to 2 sponsored FPI Webinars and will be added to T's & C's

Virtual Exhibition Stand

R16 000.00

FPI Virtual convention platform:

- A 3D standard stand within the virtual exhibition space
- Attendee gamification points awarded 50 points for visiting the virtual stand towards overall FPI awarded prize for top 3 most engaged attendee.
- Upload of product information of 1 video and 1 pdf brochures to the stand.
- 3 Full virtual convention registrations



FPI Convention Bespoke Opportunities

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|--|------------|
| Sponsored Advert | R10 000.00 |
| • One 30 second advertorial/video in between sessions | |
| Full Page Advert in 2022 Convention Magazine | R45 000.00 |
| Half Page Advert in 2022 Convention Magazine | R30 000.00 |
| Quarter Page Advert in 2022 Convention Magazine | R20 000.00 |
| Advertising on Convention splash page | R20 000.00 |
| Delegate Bag Insert (Face to Face event only) | R15 000.00 |
| Opening and Closing Billboards | R80 000.00 |
| Table Drops | R15 000.00 |

Other sponsorship options

Annual Sponsorship Partnership R750 000.00

- Website banner for a 12-month period
 - Article slot in quarterly membership newsletter
 - Branding exposure throughout the year at:
 1. 4 x Online Events (Acknowledgement as Annual sponsor on last slide of online event presentation)
 2. 36 x Webinars (Acknowledgement as Annual sponsor on last slide of webinar presentation)
 - Recognition as annual sponsor on social media platforms
 - 10-minute speaking slot at 4 virtual events throughout the year (Recording is available on the LMS for a period of one year)
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- Half page advert in the 2022 Convention magazine
 - Acknowledgement as Annual Sponsor on events registration page
 - Sponsorship of two webinars for the year

Webinar Sponsorship

R15 000.00

- Speaker opportunity on relevant subject matter
- Branding on electronic invitations sent to the FPI database which is in excess of 6 000 members
- Free website banner advertising on the FPI Events Calendar
- Relevant branding throughout the duration of the webinar/online course
- Acknowledgement of sponsor by the speaker presenting the webinar/online course
- Branded learning material if relevant to the webinar/online course
- A branded post event acknowledgement of attendance sent to delegates

Virtual Event Sponsorship

R50 000.00 (Per event)

1. Annual Refresher - 9th March 2022
 2. Estate and Trust - 6th April 2022
 3. Retirement Conference - June 2022
 4. Tax Planning Workshop - July 2022
 5. KI Training - 31st August 2022
- 30-minute speaking slot aligned to a topic assigned by the FPI
 - Branding on the electronic invitations which are sent to the FPI database which is in excess of 40 000 contacts and includes members and non-members.
 - Free website banner advertising on the FPI Events Calendar.
 - Branding exposure on the opening slide at the online event with sponsor logo and contact details
 - Complimentary attendance for two staff members per event sponsored.
 - Acknowledgement of sponsor/s by the MC in the welcoming at the event.
 - The opportunity to distribute material, which could include product information, to members together with the online workbooks.
 - A branded post event acknowledgement of attendance sent to delegates.

FPI Newsletter Advert

R25 000.00



Contact Us

Should you wish to discuss any information contained in this document, please contact us and we will gladly assist.

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Thank You

