



Financial Planning Institute of Southern Africa

2023 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.

2023 FPI Convention

2023 will mark our 34th 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

FPI Convention Platinum Package Sponsor R250 000.00

Note: This sponsorship option is limited to one (1) sponsor for the 2023 FPI Convention

Entitlements:

- Co-branding together with FPI at the Face-to-Face event venue and Virtual Platform
- 60-minute speaking slot at the event
- Verbal recognition at the opening of the event by FPI CEO/FPI Chairperson
- Opportunity for a Senior Executive to participate in one Panel Discussion during the 2-day event
- Opportunity for a Senior Executive to participate in interview by FPI Media Representative
- Co-branding together with FPI on all speaker presentations
- Co-branding together with FPI on Conference Bags distributed to delegates
- Co-branding together with FPI on Lanyards distributed to delegates
- Opportunity to insert Five (5) Bag Inserts into the Conference Bags
- Co-branding together with FPI on Convention Programme, Convention Brochure, FPI Website and all marketing collateral relating to the event
- Full Page advertisement in Convention Brochure

Extras:

- Ten (10) complimentary Face-to-Face Convention tickets
- Complimentary Face-to-Face exhibition booth
- Five (5) complimentary Virtual Convention tickets
- Complimentary 3D Virtual exhibition booth

FPI Convention Gold Package Sponsor R180 000.00

Note: This sponsorship option is limited to three (3) sponsors for the 2023 FPI Convention

Entitlements:

- Co-branding together with FPI at one (1) Breakaway Session
- Opportunity for a Senior Executive to moderate the selected Breakaway Session
- Opportunity for a Senior Executive to participate in one Panel Discussion during the selected Breakaway Session
- Co-branding together with FPI on all collateral relating the selected Breakaway Session
- Opportunity to display company banner at Breakaway venue
- Opportunity to distribute marketing material at the Breakaway venue
- Opportunity to place company logo on FPI Convention website and all marketing collateral relating to the selected Breakaway session
- Half page advertisement in Convention Brochure
- Opportunity to insert Three (3) Bag Inserts into the Conference Bags

Extras:

- Five (5) complimentary Face-to-Face Convention tickets
- Complimentary Face-to-Face exhibition booth
- Three (3) complimentary Virtual Convention tickets
- Complimentary 3D Virtual exhibition booth

FPI Convention Silver Package Sponsor R120 000.00

Note: This sponsorship option is unlimited for the 2023 FPI Convention

Entitlements:

- Opportunity to place company logo on FPI Convention website
- Quarter page advertisement in Convention Brochure
- Verbal recognition at the closing of the event by FPI CEO/FPI Chairperson
- Branding exposure on one (1) scrolling banner on the homepage of the virtual platform
- Opportunity to insert One (1) Bag Insert into the Conference Bags

Extras:

- Three (3) complimentary Face-to-Face Convention tickets
- Complimentary Face-to-Face exhibition booth
- Two (2) complimentary Virtual Convention tickets
- Complimentary 3D Virtual exhibition booth



FPI Gala Dinner Awards Sponsorship

R200 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)

R100 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

R75 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

R43 000.00

Entitlements:

- Recognition as an exhibitor on the FPI Website and marketing collateral (where applicable)

At the convention venue:

A 3mx3m 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

Virtual Exhibition Stand

R17 250.00

Entitlements:

- Recognition as an exhibitor on the FPI Website and marketing collateral (where applicable)

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.
- Recognition as an exhibitor on the FPI Website and marketing collateral (where applicable)
- 3 Full virtual convention registrations



FPI Convention Bespoke Opportunities

Sponsored Advert

R10 000.00

- One 30 second advertorial/video in between sessions

Full Page Advert in 2023 Convention Magazine

R25 000.00

Half Page Advert in 2023 Convention Magazine

R15 000.00

Quarter Page Advert in 2023 Convention Magazine

R 7 500.00

Delegate Bag Insert (Face to Face event only)

R15 000.00

Table Drops

R15 000.00

Other sponsorship options

Annual Sponsorship Partnership R500 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 2023 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

R35 000.00 (Per event)

1. Annual Refresher - 15 March 2023
 2. Estate and Trust - 19 April 2023
 3. Practice Management - 21 June 2023
 4. Retirement Conference - 30 August 2023
 5. Tax Planning - 20 September 2023
- 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.
 - The recorded session will be available for a period of one (1) year post the live event to ensure post event exposure.

About FPI Virtual Events

FPI Virtual Events are hosted annually and are attended by over 3 000 delegates.

Sponsors will benefit from one (1) year post event exposure as recordings of the live events are available post the event.



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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Financial Planning Institute of Southern Africa

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Thank You

