

Partnerships

Financial Planning Association of Southern Wisconsin

The Financial Planning Association is one of the largest, most active and most sophisticated financial advisor groups in the country with over 27,500 members and over 100 Chapters. The FPA of Southern Wisconsin is proud to be an active Chapter, recognized as a leader in the financial planning community. We were recognized by FPA as a Gold level Chapter in 2005, 2006 and 2008, and in 2009 we received the Roadmap to Success Award.

FPA-SW serves the southern half of the State of Wisconsin, with membership concentrated in the Milwaukee and Madison metropolitan areas. Our nearly 300 members are a valuable audience, collectively managing substantial assets on behalf of their clients.

Many FPA-SW members are nationally recognized as speakers, authors, and leaders in other professional groups and societies, as well as in FPA. Our members have experience ranging from seasoned advisors serving 25 or more years, to first year planners.

Partnership Opportunities

The Financial Planning Association of Southern Wisconsin exists to promote the financial planning process and advance the financial planning Profession.

The FPA of Southern Wisconsin seeks to develop long-term relationships with sponsors and partners that will result in professional and profitable relationships for our members *and* our partners.

Why choose the FPA of Southern Wisconsin as your Partner?

72% of our members hold the CFP® designation.

15% of our members hold the ChFC designation.

14% of our members hold the CLU designation.

9% of our members hold the CPA designation.

54% of our members are SEC Registered.

47% of our members are Broker Dealer Affiliated.

71% have earned a Bachelor's degree.

22% have earned a Master's degree.

53% hold a series 7 license.

48% hold a Series 63 license.

36% hold a Series 65 license.

59% are licensed for Life Insurance.

55% are licensed for Health Insurance.

46% are licensed for Fixed or Variable Annuities.

Your promotional activities with our Chapter appeal to financial planners, broker dealers, insurance professionals, accountants, attorneys, estate planners, banking officials and trust officers.

Our list of Partner opportunities, including the levels and benefits, are attached.

For more information, please contact David Dewey at 262/522-7413 or ddewey@waukshabank.com, or Karen Hendrickson at 414/358-9260 or info@fpasw.org.