

Financial Planning Association of Charlotte
Geographical Area Served: North Carolina, West of Burlington
Headquartered in Charlotte, North Carolina

Chapter Snapshot

Membership: 365 as of December 1, 2014

Membership Demographics: CFP's 76% / CLU's 14% / ChFC's 10% / CPA's 10%
Life and Health licensed – 47%
Series 6 & 7 licensed – 54%
Series 63 licensed – 127 = 34%
RIA registration: SEC – 44% / State – 25%
Fee Only 9%

Meetings and Events: Monthly luncheons held on the third Tuesday each month
January thru April / October thru December at the
Myers Park Country Club – average attendance – 70
See our Web Site: www.fpacharlotte.org for complete
schedule, details and registration.
Ethics and Insurance CE Day – May 19th – 9:00am -4:00pm.
CFP + INS. Ethics courses + Case Study with 3-hrs. CFP
and Insurance ce's
Other networking events June, July and August
The Annual Symposium and Sponsor Expo dates:
Tuesday September 8th (full Day) and
Wednesday September 9th (1/2 Day)

Marketing Opportunities: Four levels of sponsorship, Silver-Gold-Platinum-Diamond
Luncheons and events marketing recognition
Web site recognition, plus space available for a marketing
message or brochure on web site.
Individual monthly luncheon sponsorship and Symposium
speaker recognition are available.

Sponsor References: Larry Carroll, Carroll Financial Associates - 704/553-8006
Steve Grice, Dixon Wells, Charlotte, NC - 704/364-8080

Contact: Gene Curtis, Chapter Executive
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Chapter web site: fpacharlotte.org