

# CALL FOR CORPORATE SPONSORSHIPS



**2023 Winners**  
**Utah Valley University**  
**Ethan Farar and Austin Kunzler**



2022 National Financial Plan Competition



Dr. Luke Dean, RFC®, Associate Professor Utah Valley University \* 2nd place: Max Gledhill and Brooke Gibson  
3rd place: Sam Jensen and Jakob Wagner \* 1st place: Andrew Mathis and Sarah Chamberlain  
IARFC US Chapter President, Bradley K. Maples Sr., MRFC®

## 2024 IARFC NATIONAL FINANCIAL PLAN COMPETITION

Corporate Sponsorship Affects the Future.  
Make an **IMPACT** by supporting the  
next generation of financial professionals!

### The Importance of the Competition

Analyzing data from a fictional family financial case narrative, the students work through a three part process that includes:

- Case narrative and plan development
- Plan presentation of recommendations
- Financial plan delivery.

The importance of this experience is to take lessons and concepts learned in class and apply it to real world scenarios.

Professors may use the competition as part of their curriculum or as an extra credit activity. Students walk away with an appreciation of plan development, interacting with clients, and providing professional service.

### Encouraging the NextGen of Consultants

The shrinking number of financial consultants equates to a shortage of up and coming professionals. A job outlook statistic from the Bureau of Labor Statistics sees a 7% faster than average growth in job outlook for 2018-28. This becomes an important statistic when attracting the next generation to a career in financial services. What better way to support an industry that encourages this career interest than to reach students at the collegiate level?

### Corporate Involvement

Corporate Sponsorship gains positive visibility and advertising. A short webinar that details Competition Phases and Sponsorship is available upon request.

## Encourage Your Alma Mater

*Does Your  
Alma Mater have a  
Financial Planning Curriculum?*

*As a Corporate Sponsor,  
consider promoting the  
Plan Competition to  
educators as a  
“Real World” experience  
for their students!*

### Corporate Sponsorship Levels

- \$10,000 - Diamond
- \$5,000 - Platinum
- \$2,500 - Gold
- \$1,000 - Silver

For more information on Corporate Sponsorship, contact Vicki Caplinger (513) 424-5831 or [plancomp@iarfc.org](mailto:plancomp@iarfc.org)

Visit <https://www.iarfc.org/events/nfpc> for more information on the competition itself.

**A Message from Brad Maples Sr., MRFC® — US Chapter Board President** *“Your support of the IARFC National Financial Plan Competition is an investment in the future of the Financial Services Industry. It’s an opportunity to champion those university-enrolled individuals who are choosing this career field. Having been witness to the journeys of the students and the in-person phase of the Competition, I appreciate the hard work it takes to make it to the Finals and the “real world” experience students gain through competing. Help us continue this viable program that reinforces to the next generation of professionals the impact they can make on the lives of the clients they serve.”*



# NATIONAL FINANCIAL PLAN COMPETITION

2024 Event Finals will be Held at the Biltmore Estate®  
Asheville, NC.

**New for 2024  
International Teams Accepted!**

## Corporate Sponsorship Opportunities

Take part in the IARFC National Financial Plan Competition as a Corporate Sponsor. This is a give back opportunity to help the NEXTGEN of collegiate undergraduates to develop the skills they need to perform in the Financial Services industry.

### SPONSOR LEVELS

VISIBILITY AND PROMOTIONS	Diamond	Platinum	Gold	Silver
Plan Competition Award Presenter during banquet (expenses paid) - an impact statement to the financial services industry	X			
Banner Advertisement on Plan Competition web page provided by sponsor (600 pixel x 110 pixel)	X	X		
Recognition during Plan Competition - visibility and affirmation of support	X	X	X	X
Email Advertisement as Sponsor, campaign(s), videos accepted	2	General	General	General
Logo recognition featured on Plan Competition web page and Competition live promotion	X	X	X	X
Advertisement recognition in the <i>Register and Journal of Personal Finance</i> , 1 time	full page	1/2 page	1/3 page	
Personalized Message and Logo in the <i>Register and Journal of Personal Finance</i> during run of the Plan Competition promotion	X	X	X	Logo only
Media Release, Individual (personalized), General (pre-event release)	Individual	Individual	General	General
Cost	\$10,000	\$5,000	\$2,500	\$1,000

A percentage of Plan Competition Sponsorship proceeds are directly donated as monetary prize awards to the winning teams. Sponsorship opportunity promotions run duration: 12 months from the date payments are received. Promotions follow the IARFC advertising guidelines. Note: only one Diamond Corporate Sponsorship.

