



FP Canada™

*Advancing Professional
Financial Planning*

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FINANCIAL PLANNING WEEK 2019

SEMAINE DE LA PLANIFICATION FINANCIÈRE

NOVEMBER 17-23

SPONSORSHIP OPPORTUNITIES



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HISTORY & OBJECTIVES

CELEBRATING TEN YEARS OF FINANCIAL PLANNING WEEK.

The week was created to raise awareness of the need for financial planning and included a call to action to industry to collaborate and enact meaningful change for the benefit of Canadians.

FINANCIAL PLANNING WEEK 2019
IS NOVEMBER 17-23, 2019

THE OBJECTIVES OF FPW ARE TO:

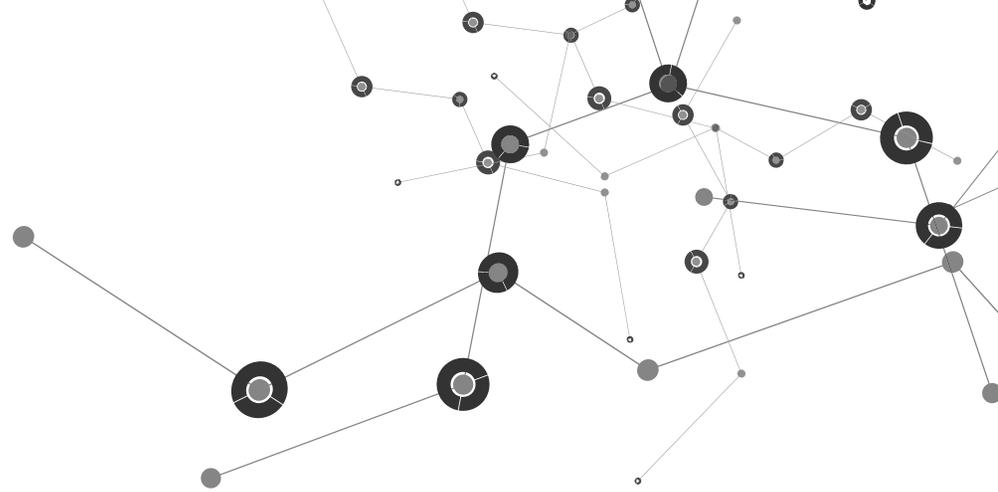
Raise awareness of the importance of financial planning and issue a call to action to all stakeholders for the benefit of all Canadians.

Encourage industry to promote the value of financial planning to their clients.

Provide a platform for financial planning professionals to discuss the necessity and evolution of the financial planning profession.

Encourage consumers to take positive planning action.

Promote the value and benefits of the CFP® and QAFP™ designations and financial planning to Canadians, financial services providers and regulators.



EXPOSURE & REACH

MANY PARTICIPATE. INDUSTRY LEADERS SPONSOR.

Give your brand prominence during this year's FPW. This is your opportunity as an industry leader to reach the consumers, CFP professionals, FPSC Level 1[®] Certificants in Financial Planning, students, educators, regulators, government representatives and media who are invited to the events.

Through a comprehensive campaign in targeted media, you can expand your reach to millions of Canadians.

Get behind this important event and highlight your leadership in this space.



CONSUMER EXPOSURE FOR YOUR BRAND:

Your logo appears in the FPW special section in *The Globe and Mail*, read by more than one million people across Canada, and will live on for three months through the Globe's digital publication, with content pushed out through influencers and social media.

PROMINENCE IN THE EYES OF CANADA'S FINANCIAL SERVICES INDUSTRY:

Your brand is featured in all pre- and post-event communications to over 20,000 invitees, including CFP professionals and other industry stakeholders. Your logo appears in an *Investment Executive* advertisement reaching over 42,000 readers across the country.

ACCESS TO CANADA'S INDUSTRY LEADERS, GOVERNMENT, MEDIA, PLANNERS:

Connect, recruit and build your brand among 1,100 delegates at what are anticipated to be sold-out events. New this year is the FP Canada Educator Luncheon in Toronto and our first-ever national live Ethics Breakfast webcast in addition to hosting two CFP Professional Symposia, two Ethics Breakfasts (one in Toronto and one in Vancouver), and the Celebration of the Profession held in Toronto. **All events sold out last year.**



2019

FPW AT A GLANCE

SAT 16	SUN 17	MON 18	TUES 19	WED 20	THURS 21	FRI 22	SAT 23
	G&M ONLINE ADS	G&M ONLINE ADS	G&M ONLINE ADS	G&M ONLINE ADS	G&M ONLINE ADS	G&M ONLINE ADS	G&M ONLINE ADS
	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA
G&M SPECIAL SECTION PUBLISHED	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT
	FACEBOOK ADS	FACEBOOK ADS	FACEBOOK ADS	FACEBOOK ADS	FACEBOOK ADS	FACEBOOK ADS	FACEBOOK ADS
		MEDIA APPEARANCES	MEDIA APPEARANCES	MEDIA APPEARANCES	MEDIA APPEARANCES	MEDIA APPEARANCES	
		MEDIA RELEASES (FP CANADA / IQPF)	EDUCATOR LUNCHEON 11:30 am to 2:00 pm Sheraton Centre, Toronto	ETHICS BREAKFAST SESSION 7:45 – 9:30 am Sheraton Centre, Toronto		ETHICS BREAKFAST SESSION 7:45 – 9:30 am Hyatt Regency Vancouver	
			RECEPTION 5:45 – 6:45 pm Sheraton Centre, Toronto	CFP PROFESSIONAL SYMPOSIUM 10:00 am – 4:00 pm Sheraton Centre, Toronto		CFP PROFESSIONAL SYMPOSIUM 10:00 am – 4:00 pm Hyatt Regency Vancouver	
			CELEBRATION OF THE PROFESSION Dinner / Awards 7:00 – 9:00 pm Sheraton Centre, Toronto				

EVENTS IN DETAIL

SYMPOSIUM: REINVENTING RELEVANCE ADAPT. EVOLVE. INSPIRE.

NOVEMBER 20, 2019 IN TORONTO // NOVEMBER 22, 2019
IN VANCOUVER

As the financial services industry faces steadily growing threats of disruption, financial planners must reinvent their relevance and their value to clients through a deeper understanding of human behaviour and new professional skills. Success in today's competitive landscape requires advanced competencies in all steps of the financial planning process, including discovery, analysis, presentation and implementation, along with a human touch that enables planners to communicate effectively and build strong relationships with clients.

This full day of CE will provide attendees with practical tips and tools for meeting the evolving needs of clients and amplifying service through more relevant consultative approaches and better relationship management.

This must-attend event attracts more than 600 financial planners and industry leaders each year.

CELEBRATION OF THE PROFESSION - RECEPTION & DINNER

NOVEMBER 19, 2019 IN TORONTO

The Celebration of the Profession Reception and Dinner gathers 250 high-profile decision-makers in the financial services industry, regulators and representatives from all levels of government to celebrate outstanding contributors to the financial planning profession. This year's Dinner will feature Erica Sigurdson, one of Canada's most accomplished comedians and a regular performer on the CBC radio's smash hit 'The Debaters' and Canadian Comedy Festival and four-time Olympic gold medalist Caroline Ouellette.

ETHICS BREAKFAST SESSION

NOVEMBER 20, 2019 IN TORONTO (**NEW THIS YEAR – CONCURRENT LIVE WEBCAST!**) // NOVEMBER 22, 2019 IN VANCOUVER

A strong professional standard, including universal adherence to a code of ethics, rules of conduct and practice standards, is a hallmark of any profession. It is a fundamental element of the commitment that clients' interests are being served ethically, competently and diligently. Moderated by Damienne Lebrun-Reid, Executive Director, FP Canada Standards Council™, this thought-provoking discussion will explore common ethical situations and challenges that occur in practice. A perennial Financial Planning Week favourite, this event sells out every year in record time. This year's Ethics Breakfast Session is expected to attract over 375 in-person attendees with another 700 attending via the live webcast.

EDUCATOR LUNCHEON (NEW!)

NOVEMBER 19, 2019 IN TORONTO

Exclusively for financial planning educators, the luncheon will share relevant regulatory updates (including the recently passed *Financial Professionals Title Protection Act, 2019* in Ontario) as well as our experience and impressions related to the upcoming changes to the FP Canada certification frameworks and education requirements that take effect in 2020.

SYMPOSIUM SPEAKERS



KEYNOTE ADDRESS | SPONSORSHIP
RESERVED FOR PLATINUM TITLE
SPONSOR

CELESTE HEADLEE
**WE NEED TO TALK: HOW TO HAVE BETTER
CONVERSATIONS**

Inject new energy into the discovery process and build deeper relationships with clients by learning how to improve your conversations. In a time when conversations are often minimized to a few words in a text message and lack of meaningful dialogue abounds, Celeste Headlee sheds a much-needed light on the lost and essential art of conversation. In this engaging presentation, Celeste draws on research in neuro and social science to increase understanding of how we relate with one another.

Celeste Headlee is an award-winning journalist, professional speaker and author of *Heard Mentality* and *We Need To Talk: How To Have Conversations That Matter*. In her 20-year career in public radio, she has produced and anchored various prominent radio programs. Through her work, Celeste has interviewed hundreds of people from all walks of life, enabling her to learn the true power of conversation and its ability to both bridge gaps and deepen wounds. Celeste serves as an advisory board member for Procon.org and the Listen First Project. Her work and insights have been featured on many major media outlets. Celeste has presented to well over 100 companies, conferences and universities. Her TEDx Talk, *10 Ways to Have a Better Conversation*, has more than 19 million total views to date.



MICHELLE HILSCHER
THE IMPLEMENTATION GAP

Why is it that some clients seek out financial planning advice, yet they fail to follow through and implement their financial plan? This session will offer insights from a research project currently underway by the FP Canada Research Foundation™ and BEworks, examining the so-called ‘implementation gap’—the factors that prevent clients from implementing the financial planning advice they receive. Learn what contributes to this gap and how you can improve the likelihood that your clients will execute the plans you build for them.

Michelle Hilscher, Ph.D., is a Senior Associate at BEworks, a management consulting firm dedicated to the practice of applying behavioral science to strategy, marketing, operations and policy challenges. Michelle manages the team’s Discovery and Behavioural Diagnostics research practice. In particular, she applies behavioural science to solve complex challenges in the financial services industry. In the past 11 years, Michelle has studied numerous topics, including: decision-making, belief bias, emotion, communications, consumer and user experience, and organizational behavior.

SYMPOSIUM SPEAKERS



ANDREW AU
NAVIGATING DIGITAL TRANSFORMATION
AND MANAGING MILLENNIAL DISRUPTION

How are Millennial values and digital technology impacting business and the economy? These disruptive forces have set a new equilibrium for organizations, from how they engage their customers to how they motivate their employees to how they innovate their products and services. This captivating session will explore strategies for navigating disruption and future-proofing your business, leaving you enlightened and eager to drive change.

Andrew Au is the co-founder and President of Intercept Group, a marketing agency that helps global brands win the head, heart and hands of Gen-Y and Z'ers across North America. Through his innovative work at the agency, Andrew was the youngest ever person to join the Entrepreneurs Organization at the age of 22. In 2016, he was among the Forbes 30 Under 30 for Marketing & Advertising. As a regular contributor to Forbes, he offers his Millennial expertise in articles and podcasts. Today, he is regarded as a generation thought leader helping global organizations win Gen-Y and Z'ers as consumers, professionals and employees.



BROOKE STRUCK
A DEEP DIVE INTO BEHAVIOURAL
ECONOMICS

How can you help clients answer questions that they don't even know they have? In this session, Dr. Brooke Struck will examine the interaction of human behaviour, machine learning and AI, and the impacts on the financial planning discovery process, analysis and decision making.

Brooke Struck is Research Director at The Decision Lab, a non-profit firm conducting research and consulting in behavioural science. He holds a doctorate in philosophy of science. His dissertation research focused on the relationship between quantitative and qualitative research methods, and the relationship between research and other social systems such as language, history and politics. Since finishing his academic work, Dr. Struck has worked in science and innovation policy, first within the Canadian federal government, and then in the private sector at Science-Metrix. In recent years, he has been researching the interface of big data analytics with organizational decision-making structures, especially in policy-making contexts.

Please read on for benefit highlights of each sponsorship opportunity. For a full list of benefits, please refer to page 11.

FPW PLATINUM TITLE SPONSOR

\$45,000 (ONE OPPORTUNITY AVAILABLE)

As our most prestigious sponsor, the FPW Platinum Title Sponsor will play a lead role throughout all FPW events and in all promotional materials

EXCLUSIVE benefits of this high-profile sponsorship include editorial space in *The Globe and Mail* Financial Planning Special Feature, your logo on the event registration web page, logo dominance in all promotional materials, your logo on the front cover of the CFP Professional Symposium program book and a full-page ad on the back cover, introduction of the keynote speaker at both Symposiums, a recording of each Symposium speaker for your organization's internal use and your organization's banner on stage at all events. You will also benefit from prominent placement of your logo in the fall issue of FP Standard. You have an opportunity to supply materials for the Symposium delegate bag. The FPW Platinum Title Sponsor will also receive a generous ticket package plus a 25% discount on additional Symposium tickets.

CELEBRATION DINNER SPONSOR

\$37,500 (ONE OPPORTUNITY AVAILABLE)

As the lead sponsor of one of the most important financial planning events of the fall, your **EXCLUSIVE** benefits include a branded networking reception room, signage next to the musical entertainment, your organization's logo as part of the centrepiece at each dinner table, and the opportunity to introduce the dinner emcee.

The Celebration Dinner Sponsor will also benefit from prominent logo presence at all events and in all promotional materials, including a half-page ad in the Symposium program book and prominent placement of your logo in the fall issue of FP Standard. You have an opportunity to supply materials for the Symposium delegate bag. The Celebration Dinner Sponsor will also receive a comprehensive ticket package plus a 20% discount on additional Symposium tickets.

SPEAKER SPONSOR

\$28,000 (THREE OPPORTUNITIES AVAILABLE)

As a Speaker Sponsor, you will introduce your session's speaker at the CFP Professional Symposium in both Toronto and Vancouver and will receive a recording of your sponsored speaker for your organization's internal use. You will benefit from logo presence at all events, logo prominence in all promotional materials, a quarter-page ad in the Symposium program book and prominent placement of your logo in the fall issue of FP Standard. You have an opportunity to supply materials for the Symposium delegate bag. Speaker Sponsors will also receive a ticket package plus a 15% discount on additional Symposium tickets.

ETHICS BREAKFAST SPONSOR

\$24,500 (BOTH LOCATIONS)

\$16,500 (TORONTO ONLY)

\$10,000 (VANCOUVER ONLY)

The Ethics Breakfast Sponsor will introduce the event from the podium in Toronto and/or Vancouver, benefit from logo prominence at the Ethics Breakfast, have your logo included in all promotional materials, and receive a quarter page or business card ad in the Symposium program book. The Toronto sponsorship also includes featuring the sponsor's logo at the beginning of live webcast and the choice to ask registrants to opt into providing their e-mail addresses for further information from the sponsor. The Ethics Breakfast Sponsor will also receive a ticket package plus a 10% or 15% discount on additional Symposium tickets (depending on whether one or both locations are sponsored).

LUNCH SPONSOR

\$17,500 (ONE OPPORTUNITY AVAILABLE)

The CFP Professional Symposium Lunch Sponsor will introduce the lunch break at both Symposiums, benefit from logo prominence during lunch and logo presence at all events, receive a business card ad in the Symposium program book, and have your logo included in all promotional materials. The Lunch sponsor will also receive a ticket package plus a 10% discount on additional Symposium tickets.

BREAK SPONSOR

\$10,000 (TWO OPPORTUNITIES AVAILABLE)

The CFP Professional Symposium Break Sponsor will benefit from logo prominence during your sponsored break (morning or afternoon in both cities) and logo presence at all events, and have your logo included in all promotional materials and the Symposium program book. The Break Sponsor will also receive a ticket package.

DELEGATE BAG SPONSOR

\$10,000 (ONE OPPORTUNITY AVAILABLE)

As the Delegate Bag sponsor, your organization's logo will be highlighted on the delegate package received by each Symposium attendee. You will receive logo presence at all events, in all promotional materials, and in the Symposium program book. The Delegate Bag Sponsor will also receive a ticket package.

EXHIBITOR

\$4,000

As an Exhibitor, you will receive a booth at Toronto and Vancouver CFP Professional Symposiums, and benefit from logo presence at all events, in the Symposium program book, and in all promotional materials.

EDUCATOR LUNCHEON SPONSOR

\$2,000 (ONE OPPORTUNITY AVAILABLE)

The Educator Luncheon Sponsor will introduce the event from the podium in Toronto, benefit from logo prominence at the Educator Luncheon, have your logo included in all promotional materials, and receive logo presence in the Symposium program book.

SPONSORSHIP DETAILS

If you have any questions about sponsorship opportunities, or if you wish to discuss a customized package for your firm, **please contact Ralph Vizl, Chief Strategy Officer, at rvizl@fpcanada.ca, 416.593.8587, ext. 225 or 1.800.305.9886.**

	FPW PLATINUM TITLE SPONSOR 1 SPOT AVAILABLE	CELEBRATION DINNER SPONSOR 1 SPOT AVAILABLE	SPEAKER SPONSOR 3 SPOTS AVAILABLE	ETHICS BREAKFAST SPONSOR 2 SPOTS AVAILABLE	LUNCH SPONSOR 1 SPOT AVAILABLE	BREAK SPONSOR 2 SPOTS AVAILABLE	DELEGATE BAG SPONSOR 1 SPOT AVAILABLE	EXHIBITOR	EDUCATOR LUNCHEON SPONSOR
Both Locations	\$45,000		\$28,000	\$24,500	\$17,500	\$10,000	\$10,000	\$4,000	
Toronto Only		\$37,500		\$16,500					\$2,000
Vancouver Only				\$10,000					
On-Stage Presence	Introduce Keynote Speaker At Both Symposiums	Introduce MC At Celebration Dinner	Introduce Your Sponsored Speaker At Both Symposiums	Introduce Ethics Breakfast (In One Or Both Cities)	Introduce Lunch At Both Symposiums				Introduce Lunch
Exclusive Benefits	Editorial space in the GLOBE AND MAIL special report Recording of all symposium speakers (for internal organizational use only) Logo on registration webpage Banner on stage at all events	Branded Room At Networking Reception Signage By Musicians Logo In Centrepiece At Each Table	Recording Of Your Sponsored Speaker (For Internal Organizational Use Only)	Logo featured at beginning of live webcast			Logo On CFP Professional Symposium Delegate Bags		

SPONSORSHIP DETAILS

	FPW PLATINUM TITLE SPONSOR 1 SPOT AVAILABLE	CELEBRATION DINNER SPONSOR 1 SPOT AVAILABLE	SPEAKER SPONSOR 3 SPOTS AVAILABLE	ETHICS BREAKFAST SPONSOR 2 SPOTS AVAILABLE	LUNCH SPONSOR 1 SPOT AVAILABLE	BREAK SPONSOR 2 SPOTS AVAILABLE	DELEGATE BAG SPONSOR 1 SPOT AVAILABLE	EXHIBITOR	EDUCATOR LUNCHEON SPONSOR
Complimentary Tickets	8 Dinner Tickets 10 Symposium Tickets 10 Ethics Breakfast Tickets	16 Dinner Tickets 5 Symposium Tickets 2 Ethics Breakfast Tickets	2 Dinner Tickets 10 Symposium Tickets	Both Cities : 2 Dinner Tickets 4 Symposium Tickets 20 Ethics Breakfast Tickets One City : 2 Dinner Tickets 2 Symposium Tickets 10 Ethics Breakfast Tickets	2 Dinner Tickets 4 Symposium Tickets 2 Ethics Breakfast Tickets	2 Dinner Tickets 2 Symposium Tickets	2 Dinner Tickets 2 Symposium Tickets	1 Symposium Booth Pass per Location (includes meal and theatre seating to Symposium)	2 Educator Lunch tickets
Discount On Symposium Tickets	25%	20%	15%	10% If One Location 15% If Both Locations	10%				
Booth	Complimentary Booth At Both Symposiums Complimentary Booth At Dinner	Complimentary Booth At Both Symposiums						Complimentary Booth At Both Symposiums	
Event Signage	Logo Dominance On Video Screens & Signs At All Events, Including Exclusive Banner On Stage At All Events	Logo Prominence On Video Screens & Signs At Celebration Logo Presence At All Events	Logo Prominence On Video Screens During Your Sponsored Session Logo Presence At All Events	Logo Prominence On Video Screens & Signs At Ethics Breakfast Logo Presence At All Events	Logo Prominence On Video Screens & Signs During Lunch Logo Presence At All Events	Logo Prominence On Video Screens & Signs During Break (Choice Of Morning Or Afternoon) Logo Presence At All Events	Logo Presence At All Events	Logo Presence At All Events	Logo Presence At All Events
Symposium Program Book	Full Page Ad On Back Cover Logo On Front Cover	Half Page Ad	Quarter Page Ad	Both Cities: Quarter Page Ad One City: Business Card Ad	Business Card Ad	Logo	Logo	Logo	Logo
Logo In Promotional Materials (Incl. The Globe And Mail, Emails, Etc.)	Logo Dominance	Logo Prominence	Logo Prominence	Both Cities: Logo Prominence One City: Logo	✓	✓	✓	✓	
Material In Delegate Bag	✓	✓	✓	If Sponsoring Both Cities	Available for \$1,000	Available for \$1,000	Available for \$1,000	Available for \$1,000	

Thank you for your interest
in Financial Planning Week.

To secure a sponsorship opportunity or to discuss a customized package for your firm,
please contact contact Ralph Vizl, Chief Strategy Officer:
rvizl@fpcanada.ca | 416.593.8587, ext. 225 or 1.800.305.9886.

