FINANCIAL PLANNING STANDARDS COUNCIL

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FINANCIAL PLANNING WEEK 2018
SEMAINE DE LA PLANIFICATION FINANCIÈRE

NOVEMBER 18-24

SPONSORSHIP OPPORTUNITIES

CONTENT:

HISTORY & OBJECTIVES

FPSC SPEARHEADED THE FIRST FINANCIAL PLANNING WEEK (FPW) IN 2009.

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 2018 IS NOVEMBER 18-24, 2018

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 progress of a financial planning profession.

Encourage consumers to take positive planning action.

Promote the benefits of financial planning to Canadians, financial planners, financial services providers and regulators.

Promote the value of the CFP® designation to the financial services industry and the Canadian public.

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 play a role.

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 1 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. We've expanded your reach by hosting two CFP Professional Symposiums and two Ethics Breakfasts (one in Toronto and one in Vancouver), in addition to the Celebration of the Profession held in Toronto.
All events sold out last year.

2018

FPW AT A GLANCE

SAT 17	SUN 18	MON 19	TUES 20	WED 21	THURS 22	FRI 23	SAT 24
G&M SPECIAL SECTION PUBLISHED	**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**
	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 (FPSC / IQPF)	**RECEPTION** 6:00 – 6:45 pm Toronto Reference Library	**ETHICS BREAKFAST SESSION** 7:45 – 9:30 am Arcadian Court, Toronto		**ETHICS BREAKFAST SESSION** 7:45 – 9:30 am Hyatt Regency Vancouver	
			CELEBRATION OF THE PROFESSION Dinner / Awards 7:00 – 9:30 pm Toronto Reference Library	**CFP PROFESSIONAL SYMPOSIUM** 10:00 am – 4:00 pm Arcadian Court, Toronto		**CFP PROFESSIONAL SYMPOSIUM** 10:00 am – 4:00 pm Hyatt Regency Vancouver	

EVENTS IN DETAIL

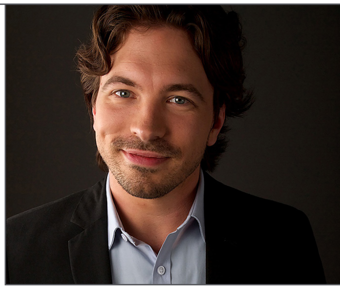
SYMPOSIUM : THE DISTINCTIVE PROFESSIONAL

NOVEMBER 21, 2018 IN TORONTO // NOVEMBER 23, 2018 IN VANCOUVER

In this age of digital platforms and robo-advice, the value proposition of the human advisor is more relevant than ever. Advice that inspires clients to take action requires professional financial planners who are masters of connecting with clients, earning their trust and confidence, and helping them make the right decisions. To create that interpersonal connection, today's planners need to know themselves just as thoroughly as their clients. What are their personal biases? Do they truly understand their client's needs and goals? And what skills can help them master client relationships so that everybody wins?

This full day of CE will explore the skills every planner needs to create the most effective connection with their clients ~~and~~ have the most meaningful impact on their clients' financial futures.

A must-attend event for a record 625 financial planners and industry leaders in 2017, we anticipate even higher attendance in 2018.



CELEBRATION OF THE PROFESSION RECEPTION & DINNER

SOLD to Investors Group

NOVEMBER 20, 2018 IN TORONTO

The Celebration of the Profession Reception and Dinner gathers 350 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 be emceed by comedian Graham Chittenden, a familiar face at the Just for Laughs festival, on TV's Comedy Network and MTV, and on radio shows including Match Game and The Debaters.

ETHICS BREAKFAST SESSION

Toronto SOLD to Hagel Lawfirm

NOVEMBER 21, 2018 IN TORONTO
NOVEMBER 23, 2018 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, FPSC's Managing Director, Standards, this thought-provoking discussion will explore ethical situations and challenges that often occur in practice, based on cases Damienne has encountered in her role. **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 300 attendees.**

SYMPOSIUM SPEAKERS

Keynote address

DALE CURD

CONNECTING THROUGH EMPATHETIC LISTENING

Do you truly understand the deeper truths about what your clients are saying to youand do they feel heard? Discover the secrets to making one-on-one connections that lead to long-term, meaningful client engagement. At the intersection of neuroscience and humanism, Dale Curd's Empathetic Listening Method is an advanced communication technique that will deliver high-impact results and help you build a greater connection with your clients than ever before.

Dale Curd is a Toronto-based psychotherapist and host of CBC Television's Hello Goodbye, exploring the heartfelt stories behind the arrivals and departures at Toronto Pearson Airport. Dale co-created and co-hosted Life Story Project on the Oprah Winfrey Network Canada, was an audience favourite on CBC's Steven and Chris, and hosted GuyTalk, a weekly national call-in radio show on Toronto's NEWSTALK 1010. Dale has also authored a weekly advice column for *24 Hours* and is on the advisory board of *Maximum Fitness* magazine.

COURTNEY PULLEN

EXAMINING THE SACRED COWS OF FINANCIAL PLANNING

Is your personal bias affecting your client engagements? This interactive session will explore the basic truths we've accepted as part of financial planning and their role in our decision making and approach to the clients we serve. Get ready to be disrupted as Courtney guides you through a re-examination of those "sacred cows", discovering different ways of thinking and considering if there are new truths to contemplate in the quest for what's possible.

Courtney Pullen, M.A., is the President of the Pullen Consulting Group and is on faculty at the University of Chicago Booth School of Business. He has more than 25 years of experience in coaching, consulting, leadership development, communication and team building. A former Clinical Associate at the School of Professional Psychology at the University of Denver and Adjunct Professor at the University of Colorado at Denver, Courtney has lectured frequently and been published in the areas of individual and organizational change, behavioural finance, communication and family wealth dynamics. He is a former contributing editor to the *Journal of Financial Planning* and the *Journal of Practical Estate Planning* and is a faculty member of the Sudden Money Institute.

SYMPOSIUM SPEAKERS

DR. MOIRA SOMERS

ADVICE THAT STICKS

When you give financial advice for a living, you know that sound counsel is only half the of the equation – you also need to deliver it in a way that your clients will follow. Dr. Moira Somers blends insights from her own extensive consulting work with research findings from neuroscience and behavioural economics to take aim at the problem of unimplemented advice. Don't miss this practical primer that will turbo-boost the effectiveness of your advice delivery and help your clients reach their goals.

Dr. Moira Somers, Ph.D., C.Psych is a clinical neuropsychologist, professor, author and executive coach based in Winnipeg. She recently published her first book, *Advice That Sticks: How to Give Financial Advice That People Will Follow*. With an uncommon combination of expertise in neuroscience, financial psychology, mental health, and behaviour change, she divides her work between direct client services and consulting to business. She trains financial professionals across North America to work more effectively with the challenges their clients bring to them, from erratic decisions and overwhelming stress to procrastination and family issues. A senior faculty member at the Sudden Money Institute, Dr. Somers has delivered keynote addresses to many associations and organizations.

SHELLE ROSE CHARVET

DECISIOn MAKING: INTERNAL AND EXTERNAL

How do people make decisions? Some people decide based on what's important to them (in other words, they're internal), while others prefer to make decisions based on what other people think is important and other outside factors (external). To be your most effective, you need to understand the different ways people think and tailor your approach accordingly. This session will explore what motivates and demotivates your clients and how you can influence and persuade them for mutually beneficial results.

Shelle Rose Charvet has trained thousands around the world in influence and persuasion. She has created a number of advanced techniques to enhance rapport, trust, credibility and influence to prevent conflicts, avoid stalemates and help everyone get what they need. She is frequently called on by organizations globally to provide expertise in below-conscious communication processes and what drives people to do (or not do) things beyond their awareness. She has been seen on CNBC, CBC, CTV and Global TV, among others. Shelle's first book, *Words That Change Minds*, is an international bestseller and available in 15 languages.

SPONSORSHIP

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)

SOLD to Business Career College

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 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

$35,000 (ONE OPPORTUNITY AVAILABLE)

SOLD to Investors Group

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. 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.

SPONSORSHIP

SPEAKER SPONSOR

1 Speaker SOLD to Mackie Research Capital Corp

$22,000 (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 and a quarter-page ad in the Symposium program book. 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

Toronto SOLD to Hagel Lawfirm

$22,000 (BOTH LOCATIONS)
$15,000 (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 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

SOLD to Chartwell Retirement Residences

$15,000 (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.

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 Kimberley Ney, Vice President, Communications, FPSC: kney@fpsc.ca | 416.593.8587, ext. 225 or 1.800.305.9886.**