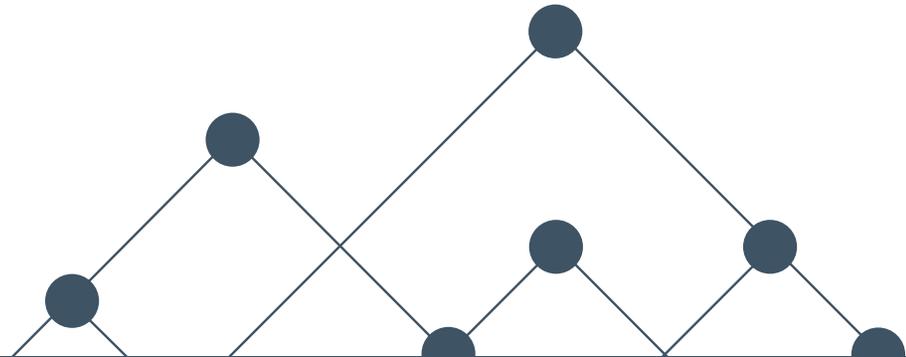


Take the next step • Allez plus loin

# FINANCIAL PLANNING WEEK 2017

## SEMAINE DE LA PLANIFICATION FINANCIÈRE



NOVEMBER 19-25

# SPONSORSHIP OPPORTUNITIES

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# 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 2017 IS NOVEMBER 19-25, 2017**

## **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.

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

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

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Encourage consumers to take positive planning action.

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

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

# EXPOSURE AND 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<sup>®</sup> 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 1.4 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.

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## 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 is published in the *FP Standard*, which reaches 70,000 through inclusion in *Investment Executive* and other distribution channels. Your logo appears in an *Investment Executive* advertisement reaching over 42,000 readers across the country.

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

Connect, recruit and build your brand at what are anticipated to be sold-out events. 1,200 attendees are expected at 2017 FPW 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.**

# FPW AT A GLANCE

# 2017

SUN 19	MON 20	TUES 21	WED 22	THURS 23	FRI 24	SAT 25
	G&M DIGITAL	G&M DIGITAL	G&M DIGITAL	G&M DIGITAL	G&M DIGITAL	G&M DIGITAL
SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA
	G&M SPECIAL SECTION PUBLISHED	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	
	MEDIA RELEASES (FPSC / IQPF)	CELEBRATION OF THE PROFESSION Dinner / Awards 6:45 – 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: 21ST CENTURY SKILLS FOR THE 21ST CENTURY PLANNER**

**November 22, 2017 in Toronto**  
**November 24, 2017 in Vancouver**

When disruption happens, it's often very fast and transforms the way we see and do things in the blink of an eye. As digitization and commoditization of information accelerates and the value of pure technical skill erodes, professions need to quickly reinvent themselves or risk becoming irrelevant.

Just as other professions have been forced to adapt to the digital age, so too must today's financial planners. Now more than ever, they need to develop skills that technology can't replace, such as managing relationships, demonstrating empathy, understanding how and why clients make the decisions they do and guiding them to the right choices. To be successful in this new world order, financial planning professionals will have to become trusted advisors, coaches and relationship managers, backed by the skills and qualifications required to thoroughly understand and motivate their clients.

**This full day of CE will explore topics that turn this critical corner. A must-attend event for over 600 planners, certificants, and industry leaders in 2016, the 2017 CFP Professional Symposium promises to sell out again in both Toronto and Vancouver.**

## **CELEBRATION OF THE PROFESSION RECEPTION & DINNER**

**November 21, 2017 in Toronto**

The Celebration of the Profession Reception and Dinner gathers over 200 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 comedienne/speaker Jen Grant, who can be heard on CBC's "The Debaters" and hosts a TV special on The Comedy Network.



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## **ETHICS BREAKFAST SESSION**

**November 22, 2017 in Toronto**  
**November 24, 2017 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 Director of Standards and Enforcement, this thought-provoking discussion will explore difficult ethical decisions 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.**



**We are proud to be presenting the following lineup of topics and speakers at this year's CFP Professional Symposium:**

KEYNOTE ADDRESS | SPONSORSHIP  
RESERVED FOR PLATINUM TITLE SPONSOR

**AJAY AGRAWAL**

The future of artificial intelligence

Ajay Agrawal, PhD, M.Eng./MBA, is the Peter Munk Professor of Entrepreneurship at the Rotman School of Management, University of Toronto, and founder of U of T's Creative Destruction Lab, which is home to the greatest concentration of AI-enabled companies on Earth. Featured on the cover of *The Report on Business*, the CDL is "paving the way for a more vibrant Canadian economy." *Report on Business* has also named Agrawal to its Power 50 list of the most influential Canadians to watch, calling him "a key contributor to Toronto's emergence as a world-class technology ecosystem".

*A captivating conversation is taking place about the future of artificial intelligence and what it will/should mean for humanity. There are fascinating controversies where the world's leading experts disagree, such as artificial intelligence's future impact on the job market; if/when human-level AI will be developed; whether this will lead to an intelligence explosion; and whether this is something we should welcome or fear. Ajay will discuss the current and future state of AI and how its evolution may impact the future of professional advice.*



**NIKOLAS BADMINTON**

Augmenting technology into your practice

Nikolas Badminton is a world-respected futurist speaker, author, and researcher. He wows audiences with keynote speeches on the impact of exponential technologies including Virtual, Augmented and Mixed Reality; Work Productivity; The Sharing Economy; Autonomous Transportation; Smart Cities; Education; The Future of AI integrated with Life and Business; and Predictions for humanity from 2017 to 2030, and beyond. Nikolas regularly appears on the BBC, CBC, CTV, Global News, VICE, and writes for Techcrunch, Huffington Post, *Forbes*, Venturebeat, Betakit, TechVibes, Business.com, and other media.

*Technology is transforming financial services delivery and consumer demand. In his address, Nikolas will discuss the implications of technological advances on the planning practice and how Financial Planners can use technology to supplant and enhance their client engagements.*



## MARK WEBER

### Between the plan and execution: the psychology of choice, decision-making and action in financial planning

Mark Weber, PhD, MA, MBA, is the Eyton Director of the Conrad Business, Entrepreneurship and Technology Centre at the University of Waterloo. Prior to his current role, Mark was the inaugural Director of the Graduate Diploma in Social Innovation at UW and served on the faculty of the Rotman School of Management and UTM at the University of Toronto for almost a decade. Mark's research on leadership, cooperation, negotiations, decision-making, and trust has been published in numerous academic journals.

*One of the greatest obstacles to good financial planning is that it involves real people rather than the hypothetical rational agents of neoclassical economics and much of our training in finance and related fields. Working with real people is messy, but also reassuringly predictable in its messiness. The best financial planners help their clients overcome that messiness, using psychology to understand their clients and help them steer a course through perceptual biases and invisible planning handicaps to a brighter future. This session is about essentials. Why do people do what they do? Why do they choose what they choose? Why do some ideas stick with them and others fall away? Why do some simple plans work and sophisticated plans fail miserably? And most importantly, how can professional financial planners be more effective; how can they help?*



## CAROLYN MCCLANAHAN

### Creating a new model for your business

Carolyn McClanahan, MD, CFP began her career as a physician. Recognizing the similarities between medicine and financial planning, and feeling empowered by helping people plan for their future, Dr. McClanahan decided to make a career change and obtained her CERTIFIED FINANCIAL PLANNER<sup>®</sup> designation. In 2004, she founded Life Planning Partners, Inc., where she is now the Director of Financial Planning. She has been quoted in numerous publications, including *The Wall Street Journal*, *Money Magazine*, *Kiplinger's*, and *Smart Money*, and has appeared on CNBC and NPR. In 2009, she was named a "Mover & Shaker" in the financial planning profession by *Financial Planning Magazine*.

*Many Financial Planning professionals are reviewing their current business models to evolve with the changing needs of society. Aging populations, disclosure requirements and client retention are top of mind. In her address, Carolyn will discuss her journey from medicine into financial planning; the health implications of an aging society; and how she successfully transitioned her firm into a retainer model.*



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

\$50,000 (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 will be placed 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.

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## CELEBRATION DINNER SPONSOR

\$35,000 (ONE OPPORTUNITY AVAILABLE)

**SOLD**

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 flower arrangements at each dinner table, and you will 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.

## SPEAKER SPONSOR

\$22,000 (THREE OPPORTUNITIES AVAILABLE)

SOLD

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.

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## ETHICS BREAKFAST SPONSOR

\$22,000 (BOTH LOCATIONS)

\$15,000 (TORONTO ONLY)

\$10,000 (VANCOUVER ONLY)

SOLD

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).

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## LUNCH SPONSOR

\$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.

## STUDENTS SPONSOR

\$15,000 (ONE OPPORTUNITY AVAILABLE)

Highlight your support of the next generation of financial planning professionals by sponsoring the CFP's Case Competition winners. Your logo will be featured on sponsored students' name badges, you will introduce the winning students at both Symposiums, receive logo presence at all events and in all promotional materials, and receive a business card ad in the Symposium program book. The Students Sponsor will also receive a ticket package plus a 10% discount on additional Symposium tickets.

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## 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.

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## 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.

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## 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.

**SOLD**

# SPONSORSHIP DETAILS

If you have any questions about sponsorship opportunities, or if you wish to discuss a customized package for your firm, please contact **Kimberley Ney, Vice President, Communications, FPSC**, at [kney@fpsc.ca](mailto:kney@fpsc.ca), 416.593.8587, ext. 225 or 1.800.305.9886.

	<b>FPW PLATINUM TITLE SPONSOR</b> 1 spot available	<b>CELEBRATION DINNER SPONSOR</b> 1 spot available	<b>SPEAKER SPONSOR</b> 3 spots available	<b>ETHICS BREAKFAST SPONSOR</b> 2 spots available	<b>LUNCH SPONSOR</b> 1 spot available	<b>STUDENTS SPONSOR</b> 1 spot available	<b>BREAK SPONSOR</b> 2 spots available	<b>DELEGATE BAG SPONSOR</b> 1 spot available	<b>EXHIBITOR</b>
<b>Both Locations</b>	\$50,000		\$22,000	\$22,000	\$15,000	\$15,000	\$10,000	\$10,000	\$4,000
<b>Toronto Only</b>		\$3,000		\$15,000					
<b>Vancouver Only</b>				\$10,000					
<b>On-Stage Presence</b>	Introduce Keynote Speaker At Both Symposiums	Introduce MC At Celebration	Introduce Your Sponsored Speaker At Both Symposiums	Introduce Ethics Breakfast (In One Or Both Cities)	Introduce Lunch At Both Symposiums	Introduce Students At Both Symposiums			
<b>Exclusive Benefits</b>	Editorial Space In <i>The Globe And Mail</i> Special Report (Print & Online)  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 Flower Arrangements At Each Table	Recording Of Your Sponsored Speaker (For Internal Organizational Use Only)			Logo On Sponsored Students' Badges		Logo On CFP Professional Symposium Delegate Bags	

# SPONSORSHIP DETAILS

	<b>FPW PLATINUM TITLE SPONSOR</b> 1 spot available	<b>CELEBRATION DINNER SPONSOR</b> 1 spot available	<b>SPEAKER SPONSOR</b> 3 spots available	<b>ETHICS BREAKFAST SPONSOR</b> 2 spots available	<b>LUNCH SPONSOR</b> 1 spot available	<b>STUDENTS SPONSOR</b> 1 spot available	<b>BREAK SPONSOR</b> 2 spots available	<b>DELEGATE BAG SPONSOR</b> 1 spot available	<b>EXHIBITOR</b>
<b>Complimentary Tickets</b>	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 4 Symposium Tickets 2 Ethics Breakfast Tickets	2 Dinner Tickets 2 Symposium Tickets	2 Dinner Tickets 2 Symposium Tickets	2 Dinner Tickets 2 Symposium Booth Passes (includes meals)
<b>Discount On Symposium Tickets</b>	25%	20%	15%	10% If One Location 15% If Both Locations	10%	10%			
<b>Booth</b>	Complimentary Booth At Both Symposiums Complimentary Booth At Dinner	Complimentary Booth At Both Symposiums							Complimentary Booth At Both Symposiums
<b>Event Signage</b>	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 During Student Introductions  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
<b>Symposium Program Book</b>	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	Business Card Ad	Logo	Logo	Logo
<b>Logo In Promotional Materials</b> <i>(Incl. The Globe And Mail, Emails, Etc.)</i>	Logo Dominance	Logo Prominence	Logo Prominence	Both Cities: Logo Prominence One City: Logo	✓	✓	✓	✓	✓
<b>Material In Delegate Bag</b>	✓	✓	✓	If Sponsoring Both Cities					

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](mailto:kney@fpsc.ca)**

**416.593.8587, ext. 225 or 1.800.305.9886.**



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