

2018 SPONSORSHIP PROSPECTUS

**Academic Research Colloquium
For Financial Planning and Related Disciplines**

February 20 - 22, 2018



**CENTER FOR
FINANCIAL PLANNING**

**Registered Program
Conference**

February 22 - 23, 2018



Renaissance Arlington Capital View Hotel

Arlington, VA

February 20 - 23, 2018

2018 ACADEMIC RESEARCH COLLOQUIUM FOR FINANCIAL PLANNING AND RELATED DISCIPLINES **FEBRUARY 20-22, 2018**

ABOUT THE COLLOQUIUM

The Colloquium is a landmark event for the financial planning profession, showcasing cutting edge research within financial planning and related disciplines that is designed to benefit financial planning firms, CFP® professionals, researchers, graduate students and the profession as a whole. It features dozens of research paper presentations, best paper awards, invited speakers, networking opportunities and much more!

More Information: CenterforFinancialPlanning.org/ARC

WHO ATTENDS?

200+ leading thinkers and doers in the emerging field of financial planning, including:

- Program directors and faculty from colleges and universities with financial planning programs
- Leading researchers in the academic community
- Firms dedicated to research and thought leadership in financial planning
- Financial planning practitioners
- Academic product and service providers
- Graduate students
- CFP Board and Center for Financial Planning leadership

CENTER FOR FINANCIAL PLANNING SPONSORS



Lead Founding Sponsor



Founding Sponsor

2017 COLLOQUIUM SPONSORS



2017
COLLOQUIUM
BY THE
NUMBERS

1st
Ever Event

200+
Attendees

39
Papers Presented

30%
Acceptance Rate

5
Best Paper Awards

The **CFP Board Center for Financial Planning** seeks to create a more diverse and sustainable financial planning profession so that every American has access to competent and ethical financial planning advice.

The Colloquium is organized in collaboration with the Canadian-based Financial Planning Standards Council and the international association, Financial Planning Standards Board.

CFP BOARD
CENTER FOR
FINANCIAL PLANNING

2018 REGISTERED PROGRAM CONFERENCE **FEBRUARY 22-23, 2018**

ABOUT THE CONFERENCE

The Registered Program Conference is the largest gathering of financial planning programs in the country, bringing together program heads and faculty from 80+ institutions that deliver professional financial planning education for individuals pursuing CFP® certification. It provides a unique opportunity to connect with program leaders, build partnerships with academic institutions, and gain access to high quality, NextGen talent.

More Information: CFP.net/RPC

WHO ATTENDS?

200+ leaders from financial planning academia and practice, including:

- Program directors and faculty from colleges and universities with financial planning programs
- Leaders from financial services and advisory firms looking to recruit the next generation of CFP® professionals
- Academic product and service providers
- Graduate students
- CFP Board and Center for Financial Planning leadership

2017 CONFERENCE SPONSORS



2017 CONFERENCE BY THE NUMBERS

25th
Event

200+
Attendees

80+
Colleges and Universities
with CFP Board
Registered Programs

216
Private meetings
between firms
and schools

20+
Financial
Services Firms

ABOUT THE HOST

The mission of **Certified Financial Planner Board of Standards, Inc.** is to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for competent and ethical personal financial planning. CFP Board currently authorizes more than 78,000 individuals to use CFP® marks in the U.S.

CFP BOARD

INFLUENTIAL SPONSORSHIPS BUILD PARTNERSHIPS

Sponsorship of the Colloquium and the Conference offers a unique opportunity to demonstrate your commitment to the profession of financial planning.

WHY SPONSOR?

Build Relationships

Build partnerships with program leaders from 100+ colleges and universities to access a pipeline of job-ready, diverse talent.

Grow Your Talent Pipeline

Connect with highly qualified students and graduates from top financial planning programs.

Build Your Brand

Provide a platform for your company to demonstrate industry leadership by participating in the largest gathering of financial planning programs in the country.

Access Latest Research

Attend dozens of presentations from distinguished scholars and be the first to access rigorous academic research that will enhance your financial planning practice.

SPONSORSHIP PACKAGES

Title Sponsor

1 Available: This exclusive package is our top-level sponsorship and offers the highest level of recognition and access at the events. It includes premier sponsorship of both the Colloquium and the Conference and is designed to maximize visibility, awareness and engagement both leading up to and onsite at the programs. This package is highly customizable and includes first choice of benefit alignment as well as right of first refusal for the 2019 programs.

Signature Sponsor

2 Available: This highly-visible sponsorship package offers prominent recognition and opportunity to align your company with the program element that makes the most sense for your brand. It is customizable, limited to just two sponsors, and includes second choice of benefit alignment.

Major Sponsor

10 Available: This is a full-spectrum package that includes opportunities for visibility, recognition and engagement throughout the program and is limited to 10 sponsors.

A La Carte Opportunities

Choose from an exciting list of exclusive branded sponsorship opportunities designed to help you stand out by increasing your visibility and driving brand awareness. (See page 6)

“Merrill Lynch found great value in sponsoring the Colloquium and the Conference which not only helped us strengthen existing partnerships with schools, but also introduced us to many new institutions and talented students and graduates. We found one-on-one meetings with the heads of the academic programs highly valuable.”

Cheri Lytle, Head of Advisor Development, Merrill Lynch Wealth Management

CONFERENCE SPONSORSHIP PACKAGES*		TITLE	SIGNATURE	MAJOR
		1 AVAILABLE	2 AVAILABLE	10 AVAILABLE
Highest level sponsor recognition in all conference marketing, event materials and event press releases		✓		
Exclusive sponsorship of Welcome Reception		✓		
Joint press release announcing sponsorship		✓	✓	
Opportunity to make brief remarks during conference		✓	✓	
Choice of one exclusive branded opportunity from Tier 1 (See page 6)		✓	✓	
Mailing to conference attendees		✓	✓	
Choice of one branded opportunity from Tier 2 (See page 6)				✓
Private, pre-arranged meetings with academic program leaders and prominent recognition during Firms and Academia Day		✓	✓	✓
Complimentary exhibit table-top display		✓	✓	✓
Recognition as a sponsor in conference materials, including on the web, in social media, in the program, and on signage		✓	✓	✓
Conference registrations		4	3	2
Right of first refusal for 2019 event		✓	✓	✓
Investment Level	Colloquium	\$25,000	\$15,000	\$10,000
	Conference	\$25,000	\$15,000	\$10,000
	Both	\$45,000	\$27,000	\$18,000

*All benefits are subject to availability and approval by CFP Board.

EXCLUSIVE BRANDED SPONSORSHIP OPPORTUNITIES

TIER 1 OPPORTUNITIES

Reserved for Title and Signature Sponsors

- **Best Paper Award Sponsorship:** Sponsorship of a Best Paper Award includes a joint press release announcing the award and sponsorship as well as opportunity to address conference attendees with brief remarks from the stage during the general session.
- **Reception Sponsorship:** Reserved for the Title Sponsor, this exclusive opportunity includes highly-visible sponsorship recognition in conference materials and at the event as well as an opportunity to make brief remarks to the attendees during the event.
- **General Session Sponsorship:** Sponsorship of a general session includes prominent recognition, an opportunity for brief remarks from the stage, and reserved seats at chosen general session.
- **Mobile App Sponsorship - NEW!** Exclusive listing as sponsor of the mobile app in all conference materials, on the website, and in a prominent section of the app for all attendees to see.

TIER 2 OPPORTUNITIES

Reserved for Major Sponsors

- **Breakfast Sponsorship - 2 Available:** Help attendees start their day off right. Sponsorship includes prominent signage and logo-napkins displaying your corporate logo for all to see as they enjoy continental style breakfast.
- **Lunch Sponsorship - 2 Available:** Sponsor the sit down, buffet lunch with all conference attendees, including prominent signage and logo-napkins displaying your corporate logo for all to see.
- **Poster Session Sponsorship - 2 Available (Colloquium Only):** Sponsor one of the poster sessions where leading academics present their research papers to the conference. Sponsorship includes prominent signage and recognition throughout conference materials.

TIER 3 OPPORTUNITIES

Available A La Carte

- **Refreshment Break Sponsor - 3 Available:** Connect your brand with one or more refreshment breaks during the conference. Prominent signage and logo-napkins display your corporate logo for all to see as they enjoy networking and light snacks and drinks. \$2,500
- **Hotel Keycard Sponsor:** Make the first impression with your logo on the hotel key cards for attendees during the events. Branded hotel room keys put your company logo in the hands of attendees multiple times throughout the event. \$2,500
- **Badge Lanyard Sponsor:** All registered attendees will receive a name badge and lanyard to be worn for identification during the events. As the sponsor, you will have your company logo on all lanyards, which will be provided by the conference organizers. \$2,500
- **Exhibit Opportunities - 25 Available:** Table-top displays are available for companies that want to have a dedicated space to showcase products and solutions and to engage with the audience. Spaces are secured on a first-come, first serve basis and include one 6-foot table with two chairs and inclusion in conference materials.
Colloquium: \$1,500
Conference: \$1,500
Both: \$3,000

“We have found that our annual sponsorship is great way to build lasting partnerships with academic institutions and program leaders.”

Vickie Abbott, President, Zahn Associates Inc.

Sponsorships are limited and available on a first-come, first serve basis. For questions or to secure your spot today, please contact Beth Klein at (202) 864-5186 or bklein@cfpboard.org.

“As we and the Center work to elevate the academic profile of this profession, TD Ameritrade Institutional, the Center’s Lead Founding Sponsor, is pleased to again sponsor the Colloquium and the Best Paper Award for Behavioral Finance.”

Kate Healy, Managing Director, Generation Next, TD Ameritrade Institutional

“As a Founding Sponsor of the Center for Financial Planning, Northwestern Mutual was delighted to sponsor the Colloquium and the Best Paper Award in Insurance/Risk Management. We were able to build new and strengthen existing relationships with financial planning programs around the country.”

Paul Gougé, Assistant Director - Financial Planning and Sales Support, Northwestern Mutual

Academic Research Colloquium For Financial Planning and Related Disciplines

February 20 - 22, 2018

CenterforFinancialPlanning.org/ARC

CFP BOARD

CENTER FOR
FINANCIAL PLANNING

Registered Program Conference

February 22 - 23, 2018

CFP.net/RPC

CFP BOARD

Contact Beth Klein at (202) 864-5186 or bklein@cfpboard.org to secure your spot today!