Sponsorship Opportunities

November 15 - 21, 2020

Resolve, Resilience & Renewal

FINANCIAL PLANNING WEEK 2020
SEMAINE DE LA PLANIFICATION FINANCIÈRE

Navigate the Decade with Confidence.

What is Financial Planning Week?

The purpose of Financial Planning Week (FPW) is to raise awareness of the importance of financial planning. FPW includes a variety of engaging events for professional financial planners, as well as a national media campaign to encourage consumers to take action.

This year, FPW is going virtual.

Through a series of live online events throughout the week, members of the professional financial planning community from coast to coast to coast will be able to participate in FPW.

Why Sponsor FPW 2020?

- ## Demonstrate your industry leadership

  This is your opportunity to reach CFP® professionals, QAFP™ professionals, students, educators, regulators, government representatives and media from across Canada.

- ## Consumer exposure for your brand

  Through a comprehensive campaign in targeted media, you'll reach millions of Canadians.

FPW 2020 Summary

Monday Nov 16	Tuesday Nov 17 1:00 – 3:00 p.m. ET	Wednesday Nov 18 12:00 – 1:00 p.m. ET	Thursday Nov 19 1:00 – 3:00 p.m. ET	Friday Nov 20
Consumer Research Study Launch	Symposium	Research Forum	Ethics Session	Globe & Mail Special Report

FP Canada Virtual Symposium

Tuesday, November 17, 2020, 1-3 p.m. ET

During a year in which financial planners and their clients have been faced with unprecedented challenges, members of the financial planning profession have demonstrated remarkable resilience. This year's Symposium will examine the skills and strategies needed to confidently navigate the decade ahead. **Join us as we go national this year and sponsor this must-attend event which has attracted more than 600 financial planners and industry leaders.**

Julie Littlechild,
Founder and CEO,
Absolute Engagement

Renew Your Client Experience

We all want to provide a client experience that not only engages but makes us a magnet for the right clients. The problem is this: The way which we engage clients is being disrupted and we aren't keeping pace. Too often we're using old approaches to tackle new challenges.

This session will get financial planners thinking about the drivers of client engagement, how they are changing and what to do to stay ahead of the curve. Julie Littlechild will take attendees inside the heads of clients to understand how they define an extraordinary experience and look outside the industry to examine how clients are experiencing true engagement.

Julie Littlechild is a recognized expert on the drivers of client engagement and a speaker on how client experience is being disrupted and how to leverage those trends to drive referrals. She has worked with and studied successful financial advisors and their clients for more than 25 years. Prior to founding Absolute Engagement, Julie launched and ran a leading research firm, focused on client engagement. She is the author of a popular blog, the co-host of the Becoming Referable podcast and the author of The Pursuit of Absolute Engagement.

Dr. Mark DeVolder,
Change Specialist

Conquering Adversity through Resilience

Why doesn't the fastest runner always win the race? Or why doesn't the smartest person always get the best job? It takes more than natural speed, intelligence, or ability to be a champion. It takes "change resilience." But resilience is not just for the elite with an Olympic gold around their neck. Resilience can be learned.

In this session, Dr. Mark DeVolder will share strategies for increasing grit, passion, and purpose by developing the mindset of a champion. Mark's best practices will help attendees cultivate determination, increase resilience and conquer adversity.

Dr. Mark DeVolder is an award winning consultant, author and international speaker. Known as the Change Specialist, Mark is recognized as one of today's original thinkers and motivators on change and transitions. Mark has worked with hundreds of clients, thousands of industry leaders and Fortune 500 companies. He has advised on some of the world's largest mergers and acquisitions. Mark is known for his compelling combination of cutting edge content, riveting storytelling, engaging audience interaction and practical takeaways.

Dr. Bonnie-Jeanne MacDonald,
Director of Financial Security Research, National Institute on Ageing

FP Canada Virtuaxl Research Forum

Wednesday, November 18, 2020, 12-1 p.m. ET

Brand new to FPW, the Research Forum will showcase recent financial planning research with practical takeaways for professional financial planners. For this session, the presentation will be by noted expert Dr. Bonnie-Jeanne MacDonald, Director of Financial Security Research, National Institute on Ageing followed by a panel discussion and end with an interactive Q&A. **Be the first to sponsor this inaugural FPW event.**

Dr. Bonnie-Jeanne MacDonald is the Director of Financial Security Research of the National Institute on Ageing (NIA) at the Ted Rogers School of Management, Ryerson University. She is also a Fellow of the Society of Actuaries and the resident scholar at Eckler Ltd. Her research focuses on the retirement and health programs available to Canada's ageing population with the goal of helping older Canadians have better financial security.

Damienne Lebrun-Reid,
Executive Director, Standards & Certification and Head of the FP Canada Standards Council™

FP Canada Virtual Ethics Session: Vulnerable Clients and Financial Abuse

Thursday, November 19, 1-3 p.m. ET

Moderated by Damienne Lebrun-Reid, Executive Director, Standards & Certification and Head of the FP Canada Standards Council™, this session will explore types of financial abuse that can arise when working with vulnerable clients, such as elderly clients or couples where spousal abuse may be occurring. Attendees will learn the signs of abuse and the steps they should take to guard against abuse when working with vulnerable clients. Panelists will present in-depth case studies highlighting situations in which powers of attorney, family members or other individuals are taking advantage of a vulnerable client, and strategies for handling such situations professionally and ethically. **Sponsor this popular event that sells out every year in record time. Attendees will enjoy an interactive event with live polls, Q&A and more.**

Holly Allardyce,
AVP, Senior Legal Counsel, MD Financial Management

Panelists:

Holly graduated from the Faculty of Law, University of Toronto in 1990 and was called to the Ontario Bar in 1992. After five years in general practice she switched gears and joined a trust company. Holly worked at TD Trust and The Bank of Nova Scotia Trust Company in various estate planning, estate administration and oversight roles before joining MD Financial Management/MD Private Trust in 2017.

Panelists: (Cont'd)

Bianca La Neve,
Partner WeirFoulds LLP

Bianca is an experienced litigator with a practice that is focused in handling complex and sensitive matters in relation to all aspects of estate, trusts and capacity litigation. She regularly handles matters concerning guardianships, will challenges and interpretations, power of attorney issues and disputes, passings of accounts, variations of trust, and dependant relief applications. She is actively engaged in the legal profession and matters that benefit the larger community.

Danielle Tetrault,
Vice-President, Compliance and Chief Compliance Officer, IG Wealth Management

Danielle has worked at IG Wealth Management for 21 years. In January 2019, she was appointed as Vice-President, Compliance and has acted as the Chief Compliance Officer of Investors Group Financial Services Inc. since December 2017. As part of her responsibilities in this role, Danielle leads the Seniors and Vulnerable Clients Working Group. She is a member of the Ontario Securities Commissions Seniors Expert Advisory Committee and the IFIC Vulnerable Investor Task Force.

Laura Tamblyn Watts,
CEO, CanAge

Laura is the CEO of CanAge, a national seniors' advocacy organization. Her work focuses on aging, inclusion, consumer rights. Laura is one of two Canadian members on the North American Securities Administrators Association's (NASAA) Seniors' Issues and Diminished Capacity Committee. She co-founded SeniorsFirst BC, a seniors' legal aid organization, and served as its first Legal Director. She received her law degree from the University of Victoria and was called to the Bar in 1999. Laura is the author of numerous papers, articles and research projects on aging issues.

National Consumer Media Campaign

FPW 2020 will include a national media campaign to raise awareness of the importance of financial planning. This includes a special report in the Globe and Mail, the release of exclusive new research, cross-country media outreach, a series of articles on **financialplanningforcanadians.ca,** a comprehensive social media campaign and more.

Sponsorship Opportunities

Offering	FPW Platinum Title Sponsor 1 SPOT AVAILABLE	Ethics Session Sponsor 2 SPOTS AVAILABLE	Speaker Sponsor 3 SPOTS AVAILABLE	FPW Event Sponsor
	$ 30,000	$ 15,000	$ 10,000	$ 5,000
Complimentary Tickets	25 individual tickets for entire event	15 individual tickets for entire event	10 individual tickets for entire event	5 individual tickets for entire event
Discount for Webinar Tickets	20%	15%	10%	5%
Exclusive Benefits	• Editorial space in the GLOBE & MAIL Special Report • Recording of Symposium Speakers (for internal organizational use only) • Logo on Registration Webpage • Logo Dominance pre/post on day of webinar • First right of refusal for Platinum Sponsorship for FPW 2021 & 2022 • Private lounge with attendees each day	• Logo Prominence pre/post on day of webinar and on demand webcast	• Recording of your Sponsored Speaker (for internal organizational use only) • Logo Prominence pre/post on day of webinar	• Logo pre/post on day of webinar
PRE-EVENT EXPOSURE				
Event Microsite	• Logo Dominance with link to company website	• Logo Prominence with link to company website	• Logo Prominence with link to company website	• Logo with link to company website
Logo in FPW Marketing Campaign, including ticket campaign, registration confirmations, Globe & Mail	• Logo Dominance	• Logo Prominance	• Logo Prominance	• Logo
FP Standard Special 25th anniversary edition (distributed to 21,000 professional financial planners)	• Half page ad	• Quarter page ad	• Quarter page ad	• Business Card ad

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Promotion on Social Media	• Logo Dominance • Individual Sponsor thank you messaging	• Logo Prominence • Individual Sponsor thank you messaging	• Logo Prominence • Individual Sponsor thank you messaging	• Logo Prominence • Individual Sponsor thank you messaging
Virtual Program Flip Book	• Full Page Ad on Back Cover • Logo on Front Cover	• Quarter Page Ad	• Quarter Page Ad	• Business Card Ad
"ON-STAGE" PRESENCE				
Multi-media	• Logo Dominance on Webinar Screens and Sponsor Recognition	• Logo Prominence on Video Screens at Ethics Session and Sponsor Recognition	• Logo Prominence on screen during Sponsored Session and Sponsor Recognition	• Logo Presence on screens during sponsor recognition
'Webinar' Presence	• Video Intro on conference day 1	• Introduce Ethics Session (video recording)	• Introduce Sponsored Speaker (video recording)	• N/A
POST EVENT FOLLOW-UP				
Material in Digital Delegate Bag	• Logo Dominance	• Logo Prominance	• Logo Prominance	• Logo
Delegate thank you email with link to Speaker presentations	• Logo Dominance	• Logo Prominance	• Logo Prominance	• Logo
Recognition in Annual Report and on post event web site	• Logo Dominance	• Logo Prominance	• Logo Prominance	• Logo

Objectives of Financial Planning Week

- 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 and the QAFP™ designation to the financial services industry and the Canadian public.

Thank you for considering sponsorship and continuing to advance professional financial planning.

If you have any questions about sponsorship opportunities, or if you wish to discuss a customized package to meet your firm's needs, contact Kristen McElhone, Director, Industry Relations at:
kristenmcelhone@fpcanada.ca

FP Canada™
Advancing Professional Financial Planning

fpcanada.ca

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September 2020