

CFP BOARD

CONNECTIONSCO NFEREN CE2025

OCTOBER 6-8 • CHICAGO

SPONSORSHIP PROSPECTUS



**MEET
LEARN
GROW
ENGAGE
ENJOY
CONNECT**

ABOUT THE CFP BOARD CONNECTIONS CONFERENCE

Join us October 6-8 in Chicago for the second annual CFP Board Connections Conference. This flagship event brings together leaders from across the financial planning profession for an engaging three-day experience. Attendees will enjoy inspiring keynote speakers, unparalleled networking opportunities and insights from top industry experts.

The CFP Board Connections Conference offers tailored programming for CFP® professionals and other practitioners, firm leaders, Registered Program faculty, academics and students. Attendees can also earn CE credit through select sessions.

Forge valuable connections with key leaders and decision-makers while showcasing your brand to a diverse and engaged audience. **A limited number of sponsorship opportunities are available — don't miss your chance to be part of this premier event!**

CFP BOARD

CFP Board consists of two affiliated organizations focused on advancing the financial planning profession for the public's benefit. **CFP Board of Standards** sets and upholds standards for financial planning and administers the prestigious CERTIFIED FINANCIAL PLANNER® certification — widely

recognized by the public, advisors and firms as the standard for financial planners — so that the public has access to the benefits of competent and ethical financial planning. CFP® certification is held by more than 100,000 people in the U.S. **CFP Board Center for Financial Planning** addresses diversity and workforce development challenges and conducts and publishes research that adds to the financial planning profession's body of knowledge.

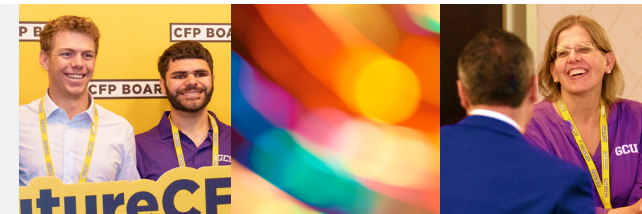
STUDENT EXPERIENCE

\$200,000

(ONE AVAILABLE)

- Enjoy exclusive access to one of the best networking spaces of the event! The Student Lounge is a comfortable place to relax, network and enjoy a snack with students and Registered Program faculty during the Conference. The space will be open Monday, October 6, to Wednesday, October 8, during Conference Hours. Additional benefits include an exclusive student tailgate-themed reception and decor pillows branded with your company logo.
- Student lounge with relevant tech supports
- Student tailgate-themed reception with the featured sponsor
- Full sponsor signage
- Lead-capture technology + list

FOR QUESTIONS OR TO SECURE YOUR SPOT TODAY,
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CONNECTIONS CAFE \$150,000

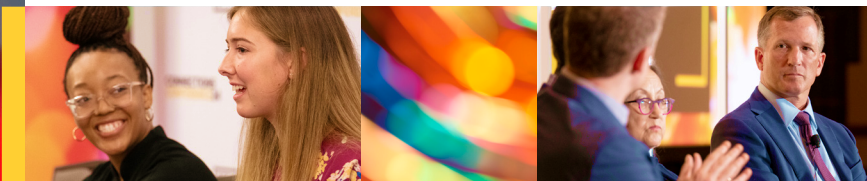
(ONE AVAILABLE)

- Back by popular demand, the Connections Cafe is a high-traffic specialty coffee bar and Exhibit Hall booth all in one! Benefits include co-branded java jackets, cups and logo placement. Includes attached booth space.

SNACK BAR \$150,000

(ONE AVAILABLE)

- Host a “Taste of Chicago” rotating Snack Bar for each day of the Conference. This new activation is sure to be the hit of the Conference! Additional benefits include co-branded snack trays and logo placement. Includes attached booth space.
- Rotating snack options, chosen in partnership with sponsor
- Sponsorship includes all three days of the event
- Wrapped bar/cart
- Sponsor booth attached



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BRAINDATE \$150,000

(ONE AVAILABLE)

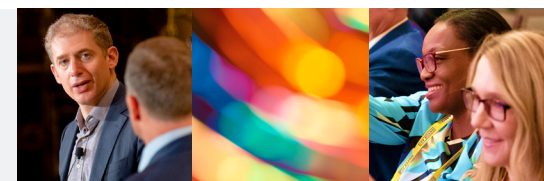
- Own the greatest networking opportunity the Conference has to offer! Ahead of the event, post conversation topics, and participants with similar interests and challenges will book time to discuss their BrainDate topics. In the days leading up to the event, the BrainDate platform transforms into a vibrant hub for conversations on topics that truly reflect the participant base.
- Located between the Connections Cafe and the Snack Bar, this lounge guarantees high levels of foot traffic.
- Sponsorship includes all three days of the event.
- Sponsor booth attached
- Includes training for using the technology
- Includes access to BrainDate analytics following the Conference closing

NIGHT ONE RECEPTION \$100,000

(ONE AVAILABLE)

- Be the first to greet attendees during the Welcome Reception on Monday, October 6! Open to all registrants, this event is a great networking opportunity for attendees and sponsors alike. Food, bar and entertainment will be part of this fun and engaging kick-off event. Sponsorship customization available. Additional benefits include a VIP section within the event area for up to 10 guests.
- Theme and menu chosen in partnership with sponsor
- Sponsor signage throughout

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MORNING KICK-OFF CELEBRATION \$100,000

(ONE AVAILABLE)

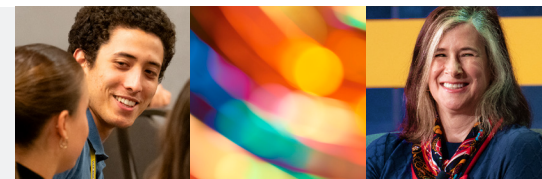
- Enjoy prominent branding in the Conference Registration Area! This energizing event will feature drinks, snacks and live music! Includes one 6' skirted table and two chairs.
- Morning DJ, food and beverage
- Sponsorship includes all three days of the event
- Sponsor booth attached

CONNECTIONS LUNCH \$75,000

(TWO AVAILABLE)

- Sponsor lunch for conference attendees and present remarks (two to three minutes)! We'll promote your brand on the large screens and provide one push notification in the Conference mobile app. You also have the opportunity to display your company's banners during meal time.

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PRO BONO EXPERIENCE \$50,000

(ONE AVAILABLE)

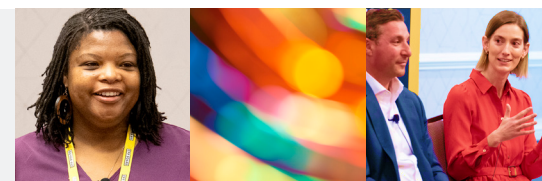
- Help the CFP® professional community give back! Practitioners and students will pair up with a local nonprofit to provide hands-on financial planning support to community members. There will be training on Day Two of the conference and the Pro Bono Experience will take place on Day Three, following the conclusion of the conference.
- Sponsored meal and additional night of lodging for participants
- Recognize pro bono leaders on the Conference mainstage and hand out awards

RELAXATION STATION \$50,000

(ONE AVAILABLE)

- One of the most popular booths at the Conference! Attendees enjoy a brief chair massage by a licensed massage therapist or a mini manicure. Option to add a smoothie cart for an additional fee. This experience can be located in proximity to your booth. Includes one 6' skirted table and two chairs.
- Massage chairs or mini-manicure station
- Optional smoothie bar add-on
- Sponsorship includes all three days of the event
- Sponsor booth attached
- Sponsor signage

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STUDENT SPONSORSHIPS \$50,000

(FOUR AVAILABLE)

- Bring the financial planning profession to life for 25 students! Sponsor future CFP® professionals to show them how this is quite possibly the perfect career.
- Sponsor 25 students inclusive of travel, hotel, meals and registration costs
- Attend the Student Experience Tailgate Reception
- Lead-capture technology
- Exclusive networking opportunity during conference lunch

TECHLAB \$40,000

(SIX AVAILABLE)

- Boost your visibility within the TechLab, home to dynamic technology and innovation. This opportunity will engage attendees in immersive demonstrations and peer-to-peer learning.

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STUDENT COMPETITION \$25,000

(TWO AVAILABLE)

- The future is bright! Help prepare future CFP® professionals through a financial planning competition. Students and CFP® professionals from the sponsor organization will join forces to address real-world challenges and get a sneak peek into the life of a CFP® professional. The sponsor will introduce all the teams on the mainstage. Prominent sponsor signage included.

KEYNOTE SPEAKER INTRODUCTION \$25,000

(FOUR AVAILABLE)

- Introduce a keynote speaker and deliver brief mainstage remarks (two to three minutes)

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HYDRATION STATION \$25,000

(ONE AVAILABLE)

- Attendees will raise a bottle to you as they stay hydrated during the Conference! Sponsorship of the Hydration Station includes branded water bottles and a refillable water station strategically placed on the conference floor for all attendees. Includes one 6' skirted table and two chairs.
- Sponsorship includes all three days of the event.
- Option to add sparkling or flavored water
- Wrapped bar/cart

ROOM CARDS \$25,000

(ONE AVAILABLE)

- Hotel access is in your hands! Own this exclusive opportunity to showcase your company logo alongside CFP Board's logo on all attendee hotel key cards and holders. This provides continuous exposure throughout the conference. Key cards and holders will be distributed to all conference attendees at the hotel check-in.

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“BARK UP” A CONNECTION \$20,000

(ONE AVAILABLE)

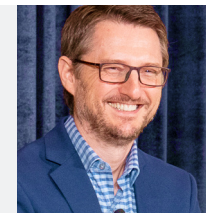
- What better way to recharge during your busy day than playing with puppies and supporting a local animal shelter? This co-branded “pawsitive” playtime experience will occur during a one-hour break during the event. Includes one 6’ skirted table and two chairs.
- Offered on one day of the event

HEADSHOT BOOTH \$20,000

(ONE AVAILABLE)

- Say cheese! A professional photographer will offer complimentary headshots to attendees on the exhibit floor. As an additional benefit, your company will receive two mobile app push notifications, reminding attendees to get their headshot taken. Includes one 6’ skirted table and two chairs.
- Sponsorship includes all three days of the event.
- Sponsor table attached

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GET COLORFUL – PAINT BY NUMBER! \$20,000

(ONE AVAILABLE)

- Fire up the fun, inspire connection — and try to stay inside the lines! Connect with attendees in an authentic and relatable way. We can turn any photo or image into a paint-by-number mural for the Conference. Includes one 6' skirted table and two chairs.

ROOM DROP \$15,000

(TWO AVAILABLE)

- Have a promotional piece delivered directly to attendee guest rooms on Day One or Day Two of the Conference! Your company will provide pre-assembled items for in-room delivery including any specialty packaging. All costs associated with development of room drop items (including design, product orders and delivery) are the sole responsibility of the sponsor. Materials to be distributed are subject to approval. Sponsorship fees cover hotel room drop charges.

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CANDY CORNER

\$15,000

(THREE AVAILABLE)

- Sponsor a delicious and much-appreciated treat! Attendees can choose healthy options, such as nuts and seeds, or fun options, such as candies! Additional benefits include branded treat bags or bowls. Includes one 6' skirted table and chairs.
- Candy bar
- Sponsorship includes all three days of the event.
- Branded bags/bowls
- Sponsor table attached

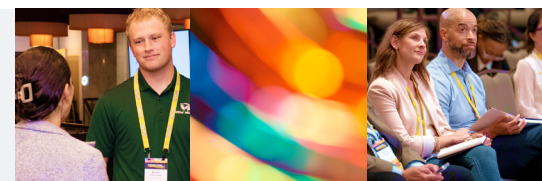
STAY CONNECTED

\$10,000

(THREE AVAILABLE)

- Power up and empower attendees to stay connected during the conference with our charging stations! This station can be placed in proximity to your booth, so attendees will pause with you while they recharge. As an additional benefit, your company logo will be displayed on the mobile device charging station. Includes one 6' skirted table and two chairs.
- Charging stations for phones
- Sponsorship includes all three days of the event.
- Sponsor table attached

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TABLETOPS STARTING AT \$10,000

Selling Quickly!

Each Exhibit-only purchase includes:

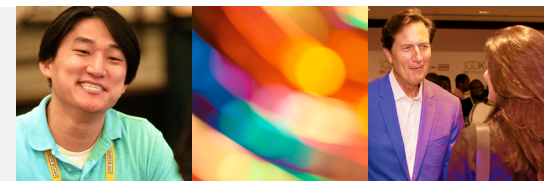
- One 6' skirted table, two chairs and basic Wi-Fi
- Recognition on signage and on the Conference website
- Overnight security
- Exhibitors may opt to purchase lead retrieval services through CFP Board's registration vendor. The service is a paperless way to collect contact information for all attendees who visit your booth. Simply use the provided device to scan the QR code on the attendee badges and their details will be saved for you. The cost for this service is \$400.

AUTHOR'S SPOTLIGHT \$5,000

(FOUR AVAILABLE)

- Provide a book signing with the authors who wowed the audience! Your company logo will be printed on a bookplate provided with each copy of the book.

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CONNECTIONS CONFERENCE APP \$5,000

(ONE OF FOUR SOLD)

- The Connections Conference mobile app provides quick access to the agenda, floor plan, event listings and more. Attendees reference it often, which provides ongoing visibility for sponsors. Your logo will appear on the splash screen and you are entitled to one push message to all app users.

A LA CARTE OPTIONS

(ONLY AVAILABLE WITH
PURCHASE OF ANOTHER
PACKAGE)

- Package of two (2) conference registrations — \$1,590
- General Session Chair Drop: Drop marketing materials or a logo promotional item during the General Session on Monday, Tuesday or Wednesday — \$3,000
- Registration Bag Insert: Include marketing materials or a logo promotional item in the registration bag distributed to all conference attendees at registration. Size restrictions may apply — \$2,000
- Daily Update: Nightly electronic update to include next day sessions and activities branded with sponsor logo delivered to each attendee via email on Sunday, Monday and Tuesday — \$2,000 per day or \$5,000 for three days

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NETWORKING POLICY

Exhibitors and Sponsors are invited and encouraged to attend all receptions, meals and conference social activities. CFP Board values your participation in our receptions, which offer a more casual atmosphere to interact with attendees. Complete details on all events will be made available.

BOOTH ASSIGNMENT POLICY

Booth assignments will begin in early June 2025. Priority will be given to the highest contributing sponsors, then by the order in which contracts are received. No booths will be assigned without full payment. CFP Board reserves the right to determine final exhibit booth assignments and the right to alter the floor plan at any time.

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EXHIBITOR HOURS

- **LOAD IN**

Sunday, October 5 at 3 p.m. CT

- **LOAD OUT**

Wednesday, October 8 at 3 p.m. CT

- **EXHIBIT HOURS**

Subject to change, check online agenda

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**CONNEC
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CONFERENCE
2025**

CFP BOARD

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