

CFP BOARD

2020 REGISTERED PROGRAMS CONFERENCE

SPONSORSHIP PROSPECTUS



MARCH 16-17, 2020 WASHINGTON, DC

2019 CONFERENCE SPONSORS



COLLEGE FOR
FINANCIAL PLANNING®
A KAPLAN COMPANY



Vanguard®



ABOUT THE CONFERENCE

The CFP Board Registered Programs Conference is the largest gathering of financial planning programs in the country, bringing together program heads, faculty, and students from institutions that deliver financial planning education for individuals pursuing CFP® certification. The RPC 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?

More than 250 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 services providers
- CFP Board leadership
- Registered program students and candidates pursuing CFP® certification

ABOUT THE HOST

The mission of the 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 84,000 individuals to use the CFP® marks in the U.S.

2019 CONFERENCE BY THE NUMBERS

27th

Event

275+

Attendees

100+

Registered Program Providers

80+

Student Track Registrants

10+

Financial Service Firms



INFLUENTIAL SPONSORSHIPS BUILD PARTNERSHIPS

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

WHY SPONSOR?

BUILD RELATIONSHIPS

Build partnerships with hundreds of registered program leaders from colleges and universities across the country 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.

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 event. It includes premier sponsorship of the conference and is designed to maximize visibility, awareness, and engagement both leading up to and onsite at the event.

SIGNATURE SPONSOR

3 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 three sponsors, and includes choice of benefit alignment.

MAJOR SPONSOR

5 Available: This is a full-spectrum package that includes opportunities for visibility, recognition and engagement throughout the program and is limited to five 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](#))



The Registered Programs Conference is the optimal opportunity to network with financial planning education industry leaders and learn about best practices that result in the advancement of the profession. The College for Financial Planning, a Kaplan Company, is again honored to participate as the title sponsor for this event, helping to ensure that this annual collaboration of CFP Board, financial planning educators, and industry leaders continues to expand. We look forward to meeting with you in March!

Dirk Pantone, CPA, CFP®

President, College for Financial Planning, a Kaplan Company



CONFERENCE SPONSORSHIP PACKAGES*

	TITLE 1 AVAILABLE	SIGNATURE 3 AVAILABLE	MAJOR 5 AVAILABLE
Highest level sponsor recognition in all conference marketing, event materials, and event press releases	✓		
Sponsor of evening networking reception with financial services firms and opportunity for brief remarks during reception	✓		
General session sponsor	✓		
Inclusion in conference sponsorship press release	✓	✓	
Opportunity to make brief remarks during conference	✓	✓	
Choice of one exclusive branded opportunity from Signature and Major Sponsor Opportunities (See page 6)		✓	
Choice of one branded opportunity from Major Sponsor Opportunities (See page 6)			✓
Complimentary table-top display in exhibitor hall	✓	✓	✓
Recognition as a sponsor in conference materials, including the event website, social media, conference program, and signage	✓	✓	✓
Conference registrations	5	4	3
Investment Level	\$40,000	\$20,000	\$12,500

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

SPONSORSHIPS ARE LIMITED AND AVAILABLE ON A FIRST-COME, FIRST-SERVE BASIS.

For questions or to secure your spot today, please contact registeredprograms@cfpboard.org.

EXCLUSIVE BRANDED SPONSORSHIP OPPORTUNITIES

SIGNATURE SPONSORS

Mobile App Sponsorship:

Exclusive listing as sponsor of the mobile app in all conference materials, on the website, and the app for all attendees to see.

Candidate Hub Sponsorship:

For the second year in a row, registered program students get to connect with a CFP® professional at the Hub throughout the conference.

Students can ask questions, receive resume feedback, and gain further insight into the dynamic profession of financial planning!

MAJOR SPONSORS

Breakfast Sponsorship –

1 available: Help attendees start their day off right. Sponsorship includes logo-napkins displaying your corporate logo for all to see as they enjoy continental style breakfast.

Lunch Sponsorship – 1 available:

Sponsor the sit down, buffet lunch with all conference attendees, including logo-napkins displaying your corporate logo for all to see.

Refreshment Break Sponsor –

2 Available: Connect your brand with a refreshment break during the conference. Logo-napkins display your corporate logo for all to see as they enjoy networking and light snacks and drinks.

A LA CARTE

New! Student Track Sponsorship

– 1 Available: Connect your brand with registered program students by sponsoring the second annual Student Track at the Registered Programs Conference. Sponsorship includes prominent signage featuring your brand in the Student Track session space, T-shirts with your company's logo for student attendees, and an opportunity for welcoming remarks during the opening Student Track session. \$5,000

Registered Program Excellence in Pro Bono Award – 1 Available:

CFP Board and the Foundation for Financial Planning are proud to award the 2nd Annual Registered Program Excellence in Pro Bono Award. The award recognizes one CFP Board Registered Program for making significant contributions

to pro bono financial planning. Sponsorship of the award includes recognition in conference materials, inclusion in award press-release, branded award plaque and a \$5,000 grant for the winning program to put toward future pro bono activities. \$6,000

Exhibit Opportunities –

15 Available: Table-top displays are available for companies that want to have a dedicated space to showcase products and solutions to engage with the audience. Spaces are secured on a first-come, first-serve basis and include one attendee registration (discounted registration fee available for additional attendees), one six-foot table with two chairs and inclusion in conference materials. \$2,500

Refreshment Break Sponsor –

1 Available: Connect your brand with a refreshment break 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. \$3,000

Badge Lanyard Sponsor: All registered attendees will receive a name badge and lanyard to be worn for identification during the event. As the sponsor, you will have your company logo on all lanyards, which will be provided by the conference organizers. \$2,500

Hotel Keycard Sponsor: Make the first impression with your logo on the hotel key cards for attendees during the event. Branded hotel room keys put your company logo in the hands of attendees multiple times throughout the event. \$3,000

Sponsorships are limited and available on a first-come, first-serve basis.

For questions or to secure your spot today, please contact registeredprograms@cfpboard.org.

FINANCIAL SERVICES FIRMS



Attending the Registered Programs Conference is a great way for financial services firms to connect directly with registered program directors and financial planning students to strengthen your talent pipeline. Last year's conference included representatives from 100+ colleges and universities, and more than 80 student track registrants. We are excited to expand student engagement even further at the 2020 Registered Programs Conference. The conference provides an opportunity to focus on building your talent pipeline by networking directly with the representatives of CFP Board Registered Programs, as well as helping you to fill your immediate talent needs by meeting top financial planning students.

The registration package for firms includes conference registration for two attendees (discounted registration fee available for additional attendees) and a reserved six-foot table with two chairs during the Thursday evening networking reception with firms and programs. \$1,500

NETWORK WITH FINANCIAL PLANNING PROGRAM DIRECTORS AND FACULTY. MEET TOP FINANCIAL PLANNING STUDENTS. BUILD PARTNERSHIPS TO STRENGTHEN YOUR TALENT PIPELINE.

CONFERENCE EXHIBITORS

With more than 300 attendees expected to attend the 2020 Registered Programs Conference, reserving an exhibitor table is the perfect way to connect directly with financial planning program faculty and students throughout the conference. Table-top displays are available for companies that want to have a dedicated space to showcase products and solutions to engage with conference attendees.

With 15 exhibitor spaces available, space is limited and secured on a first-come, first-serve basis. The exhibitor package includes one attendee registration (discounted registration fee available for additional attendees), one 6-foot table with two chairs and inclusion in conference materials. \$2,500





CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

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