



PROFESSIONALS

CONVENTION

Century City Conference Centre

19-20 OCTOBER

2017

LEAD | INSPIRE | BUILD TRUST



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ABOUT FPI

The Financial Planning Institute of Southern Africa (FPI), a South African Qualifications Authority (SAQA) recognised professional body for financial planners, serves the public by ensuring that people who carry the CFP® designation are qualified, experienced and professional.

We are recognised internationally and are a founding and a current affiliate member of the international Financial Planning Standards Board Ltd (FPSB) based in the United States of America. Along with 25 other affiliate member countries we offer CFP® certification, the highest recognised professional designation worldwide for a financial planning professional. In 2012, we were highly commended by FPSB and awarded Tier 1 Affiliate Status for receiving 96% in the global assessment. This is the highest achievement any affiliate has ever received.

VISION

To provide professional financial planning for all.

MISSION

Is to advance and promote the pre-eminence and status of financial planning professionals, while at all times acting in the interests of the society whom the profession serves.

SPONSORSHIP ENGAGEMENTS

The FPI Centre for Professional Development will be hosting various events supplying a range of excellent sponsorship and exhibition opportunities. During 2016, the Centre had more than 13 000 attendees at CPD events hosted across various platforms.

These are listed below and may be negotiated with the local organising committee via the listed contact details.

We are really looking forward to welcoming you and your organisation / institution as one of more than 800 attendees and more than 90 exhibitors to this iconic FPI 2017 event.

FPI 2017 Professionals Convention

The FPI Professionals Convention is one of the largest annual financial planning events on the financial services industry's calendar, attracting 1000 delegates, including exhibitors and sponsors, each year.

FPI PROFESSIONALS CONVENTION

EXHIBITION

3m x 3m SHELL SCHEME

ZAR 35,500.00 (INCL. 14% VAT)

Includes two spotlights, fascia name board, DB Board and table with two chairs and two passes.

3m x 3m FLOOR SPACE

ZAR 31,350.00 (INCL. 14% VAT)

Includes two spotlights, fascia name board and table with two chairs and two passes.

NB: Floor space exhibitor must hire a DB Board in order to have power supplied to the stand.

Not included in the exhibition package:

- o Additional ADSL or bandwidth connections
- o Freight handling, forwarding and storage facilities

**The services catalogue for the hire of additional furniture, electrics, plants, AV/IT, stand catering, beverages etc. will be circulated to all confirmed FPI 2017 exhibitors. Items found in the services catalogue will be payable in advance for the appointed supplier to be able to deliver.*

HEADLINE SPONSOR (Limited to two organisations)

ZAR 750,000.00 (INCL. 14% VAT)

BENEFITS FOR HEADLINE SPONSORSHIP

- Triple stand
- Branding on convention website
- 2 x Exhibitor registrations included
- Bag insert
- 500 word company profile and logo in the programme
- 7 full access registration passes
- Speaking slot
- One FPI CPD face-to-face event
- One webinar
- 1 full page advert in of *The Financial Planner** magazine for 2 issues
- Billboard banner on the *FPI NewsBrief** newsletter for 3 issues

GOLD SPONSOR

ZAR 500,000.00 (INCL. 14% VAT)

BENEFITS FOR GOLD SPONSORSHIP

- Double stand
- Branding on convention website
- Bag insert
- 250 word company profile and logo in programme
- 3 full access registration passes
- Speaking slot
- Two webinars
- Two online courses
- 1 full page advert in *The Financial Planner** magazine for 2 issues
- Medium rectangle banner on the *FPI NewsBrief** newsletter 3 issues

SILVER SPONSOR

ZAR 250,000.00 (INCL. 14% VAT)

BENEFITS FOR SILVER SPONSORSHIP

- Single stand
- Branding on convention website
- 150 word company profile and logo in programme
- 2 full access registration passes
- Speaking slot
- Two webinars
- One online course
- 1 Half page advert in *The Financial Planner** magazine for 1 issue
- Storybreak on *FPI NewsBrief** newsletter for 1 issue

BRONZE

ZAR 180,000.00 (INCL. 14% VAT)

BENEFITS FOR BRONZE SPONSORSHIP

- Branding on convention website
- 100 word company profile and logo in programme
- 2 full access registration passes
- Two webinars
- 1 half page advert in *The Financial Planning** magazine for 1 issue
- Storybreak on *FPI NewsBrief** newsletter for 1 issue

FPI AWARD DINNER SPONSOR

ZAR 150,000.00 (INCL. 14% VAT)

BENEFITS FOR AWARD DINNER SPONSORSHIP

- Branding on convention website
- 50 word company profile and logo in programme
- Logo on the Gala Dinner printed materials
- 1 full access registration pass
- 4 Gala Dinner passes
- CEO to present the awards during the award ceremony with FPI

DELEGATE BAG, NAME BADGE AND LANYARD SPONSOR

ZAR 200,000.00 (INCL. 14% VAT)

BENEFITS FOR DELEGATE BAG, NAME BADGE AND LANYARD SPONSORSHIP

- Branding on convention website
- 50 word company profile and logo in programme
- Logo on the convention bag, badge and lanyard selected by FPI
- Bag insert
- 1 full access registration pass

BENEFITS FOR REGISTRATION AND LOUNGE AREA SPONSORSHIP

- Logo to appear on the registration counters accompanied by FPI branding
- Sponsor logo on cushions displayed on lounge furniture
- Branding on convention website
- 50 word company profile and logo in programme
- 2 full access registration pass
- Medium rectangle Banner on FPI *NewsBrief* newsletter for 1 issue

BENEFITS FOR BAG INSERT SPONSORSHIP

- Opportunity to insert either an A4/A5 item within the convention bag
- Branding on convention website
- 50 word company profile and logo in programme
- Marketing material to be distributed at one of the FPI CPD events either in the room or at registration

BENEFITS FOR TEA BREAK SPONSORSHIP

- Branding on convention website
- 50 word company profile and logo in programme
- Logo to be displayed by the tea and coffee stations

BENEFITS FOR MOBILE APP SPONSORSHIP

- Branding on convention website
- 50 word company profile and logo in programme
- Logo displayed on the mobile app and distributed to attendees prior to and at the event

****As part of the above packages please select the webinar, online course and FPI CPD event where applicable.***

**The Financial Planner magazine (print and digital) – an official quarterly FPI journal targeted at professionals within the financial services industry. The publication is distributed electronically to over 10000 professionals in the industry, including students studying a financial planning qualification. A 1000 copies are printed and posted to members who have subscribed to receive printed copy. With 2000 copies printed and handed out at the FPI Professionals Convention. The digital copy of the magazine placed on the FPI website.*

** FPI NewsBrief (digital newsletter) - a monthly newsletter distributed to over 1000 FPI members, key contacts from FPI local and international affiliates partners, media, regulators and other associations. The newsletter aims to provide FPI's target audience with the latest FPI news and events as well as FPI developments. The latest ad past issue are also available place on the FPI website.*



SPONSORSHIP BOOKING PROCEDURE

CONFIRMATION

Upon approval of the application, written confirmation of sponsorship level, benefits, space assignment, invoice for payment and all necessary information will be provided by the convention secretariat, The Conference Company.

Should you require additional exhibition space other than what was allocated, please advise the convention secretariat in writing immediately. Any further monies owed are due on presentation of the invoice.

BOOKING POLICIES

- Sponsorship and Exhibition Stand Confirmation – We cannot confirm assignment and confirmation until we have received full payment. Upon acceptance and approval of an application for sponsorship, the assignment of the exhibition space and confirmation of sponsorship details, will be confirmed in writing by the Convention Secretariat.
- Cancellation – Should you wish to cancel your sponsorship; notification will only be accepted in writing.

PAYMENT TERMS AND CONDITIONS

Acceptable forms of payment

- Credit Cards – Visa or MasterCard
- Electronic Funds Transfer (EFT)

Please use the reference number as stated on the invoice when making payment. Please send proof of payment to:

FPI 2017
C/O The Conference Company
Email: amiee@fpi.co.za

The organizers reserve the right to cancel, change or move your stand, as well as alter the floor plan where necessary

CANCELLATION POLICY

- ** 60 – 90 prior to the set up day of the convention: 50% refund
- ** 59 days or less to the event: No refund – 100% non-refundable

SPONSORSHIP BOOKING FORM

COMPANY & INVOICING DETAILS

COMPANY NAME : _____

VAT NUMBER : _____

ADDRESS : _____

_____ CODE: _____

TELEPHONE : _____

FAX : _____

PERSON RESPONSIBLE FOR BOOKING & PAYMENT

NAME & SURNAME : _____

CAPACITY : _____

CELL NO. : _____

EMAIL ADDRESS : _____

SPONSORSHIP PACKAGE

Package 1: _____

All Sponsorship packages booked must be paid for and proof of payment provided in 30 days from booking date. Sponsorships not paid after 30 days could be released and given away to other interested sponsors.

NB: Booking form must be sent together with signed terms and conditions page.

EXHIBITION BOOKING FORM

COMPANY & INVOICING DETAILS

COMPANY NAME : _____

VAT NUMBER : _____

ADDRESS : _____

_____ CODE: _____

TELEPHONE : _____

FAX : _____

PERSON RESPONSIBLE FOR BOOKING & PAYMENT

NAME & SURNAME : _____

CAPACITY : _____

CELL NO. : _____

EMAIL ADDRESS : _____

EXHIBITION STAND NUMBER

1st Choice : _____

2nd Choice : _____

Exhibition Stand includes Complimentary Exhibitor Registrations

Additional Exhibitor Passes: _____ @ R6, 500 each

All Sponsorship packages booked must be paid for and proof of payment provided in 30 days from booking date. Sponsorships not paid after 30 days could be released and given away to other interested sponsors.

NB: Booking form must be sent together with signed terms and conditions page.

TERMS & CONDITIONS

The **exhibitor** agrees to be bound by these Terms of Acceptance with respect to support for FPI 2016 and further agrees that it shall be bound by the rates, submission deadlines, cancellation deadlines, and cancellation conditions outlined below.

1. All participation is subject to the approval of FPI who also reserves the right to decline or cancel exhibitors due to non-performance.
2. No responsibility will be accepted by FPI for loss arising from non-adherence to deadlines of whatsoever nature which, once provided to the sponsor or expo partner, immediately come into effect and form part of this contract.
3. FPI will use its best endeavors to deliver on its obligations to the sponsor / exhibition partners correctly but will not be liable for any loss of profits or damages suffered by the participant as a result of the participant's failure to do so and any failure in this regard will not entitle the advertiser to withhold payment of the account rendered in any respect.
4. FPI shall be exempt from any liability arising from force majeure or where performance of its obligations is prevented by circumstances outside its control.
5. Verbal cancellation will not be valid; only a written cancellation via an email or faxed letter, with an acknowledged response from FPI, will be accepted by FPI and will serve as notice. Any cancellations made after March 2017, will be required to pay 50% of the full invoiced price.
6. Should FPI agree in its sole discretion to assist, or complete, requirements of the participant, then all FPI production costs will be for the account of the participant at standard industry rates.
7. All amounts payable are due simultaneously by the date mentioned on this document as "payment date", save where FPI has approved, in writing, an extension of the payment deadline in which event, FPI reserves the right to suspend services if payment is not received on the due date.
8. Nothing herein contained shall be interpreted as obliging FPI to afford the participant any indulgence to effect payment after due date.
9. In the event of FPI instructing its attorneys to collect any amounts, all legal fees and collection charges, determined as the maximum permitted fees and charges in terms of the National Creditors' Act and its regulations, a commission of 20% of the amount outstanding, and legal fees as between attorney and participant shall be borne by the participant.
10. The advertiser agrees that these Terms of Acceptance constitute a valid contract with FPI and certifies that all information given herein by him/her/it to the representative of FPI is true and correct.
11. This agreement is governed by South African Law and is subject to the jurisdiction of the South African courts. FPI is allowed to institute legal proceedings for the recovery of any amount owing hereunder in the Magistrate's Court of any district which by virtue of Section 28 of the Magistrate's Court Act has jurisdiction over the advertiser, but this does not preclude FPI at its own discretion from instituting legal proceedings in the Supreme Court of South Africa which has jurisdiction over the participant.
12. All terms and conditions relating to the services are set out herein. All other terms and conditions are excluded unless agreed to in writing by FPI, and no other conditions, warranties or representations, whether oral or written, express or implied by statute or otherwise, will apply hereto.
13. No concession, latitude or indulgence allowed by FPI to the participant shall be construed as a waiver or abandonment of any of FPI rights hereunder.
14. In the event that any of the terms of these Terms of Acceptance are found to be invalid, unlawful or unenforceable, such terms will be severable from the remaining terms, which will continue to be valid and enforceable.

ACCEPTANCE OF THE ABOVE TERMS & CONDITIONS:

NAME & SURNAME : _____

CAPACITY : _____

COMPANY : _____

DATE : _____



CONTACT DETAILS

To discuss any of the above sponsorship and exhibition package or should you wish to enquire about stand availability, please contact:

Michelle Baker

Tel: **+27 031 764 6725**

Mobile: **073 137 1231**

Email: **michelle.baker@mediamarx.co.za**

LIABILITY

The Convention organisers have taken all reasonable care in making arrangements for the convention in the event of unforeseen disruptions, neither the convention organisers nor FPI can be held responsible for any losses incurred by delegates. The programme is correct at the time of printing, but organisers reserve the right to alter the programme if and when deemed necessary. The convention organisers act as agents only in securing hotels, transport and travel services, and shall in no event be liable for acts or omissions in the event of injury, damage, loss, accident delay or irregularity of any kind whatsoever during arrangements organised through contractors or by the employees of such contractors. Hotel and transportation services are subject to the terms and conditions under which they are offered to the general public. Delegates should make their own arrangements with respect to personal insurance. The convention organisers reserve the right to make changes as and, when deemed necessary, without prior notice to the parties concerned. All disputes are subject to resolution under South African Law.