

# Corporate Membership & Sponsorship Opportunities 2017

Engage with our financial planning community



NEW  
OPPORTUNITIES  
AVAILABLE

PRICE  
FREEZE



**CISI**  
CHARTERED INSTITUTE FOR  
SECURITIES & INVESTMENT

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Inspiring professionals, transforming businesses and changing lives

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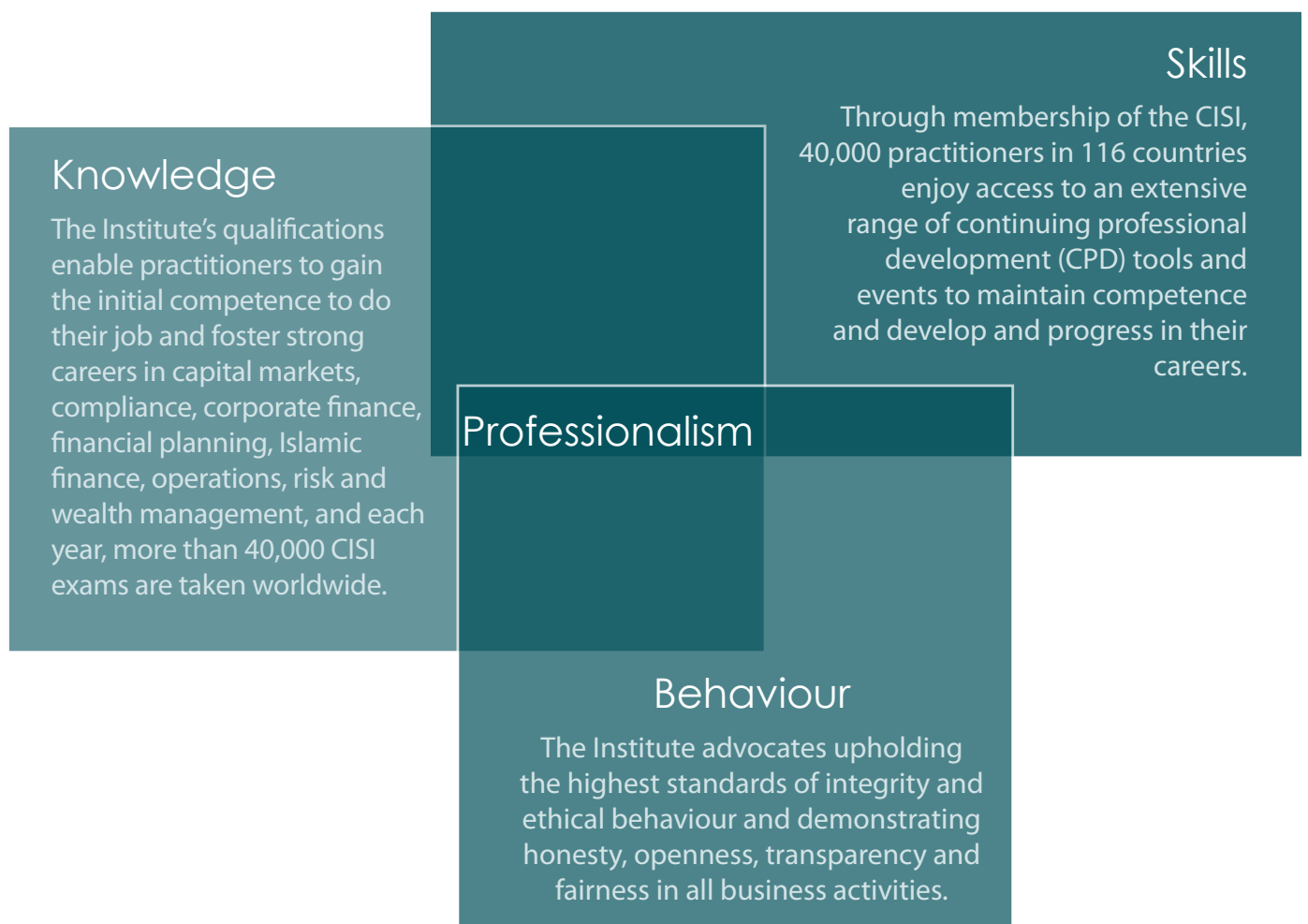
# Why partner with us?

We are delighted to be able to offer a number of fantastic sponsorship opportunities at CISI events in 2017.

- ✓ Be associated with the CISI, an educational charity wholly focused on upholding the standards of professionalism, excellence and integrity within the securities, investment, wealth and financial planning industries.
- ✓ Raise your organisation's profile.
- ✓ Network with key decision makers and the decision makers of the future.
- ✓ Promote the development of individuals and the sector as a whole.
- ✓ A great opportunity to obtain media exposure.

## About us

We are the leading professional body for securities, investment, wealth and financial planning professionals. The Institute promotes the highest standards of professionalism amongst its members and the wider financial services industry and believes professionalism is the blend of three elements...



# About us



Working in sectors:

Capital  
Markets

Corporate  
Finance

Compliance  
& Risk

Financial  
Planning

Islamic  
Finance

Operations

Wealth  
Management

We support the professional development needs of members, helping them build successful businesses and develop fulfilling careers.

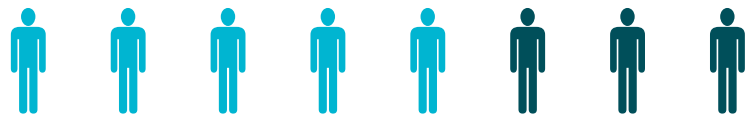
Our thriving network of local branches across the UK hold regular branch meetings and are popular with members. Don't miss out on the great opportunity to network.

Our events have a reputation for outstanding content and value. Our flagship event, The Financial Planning Annual Conference, takes place 25-27 September 2017 at the Celtic Manor and attracts 400 delegates

## About our Financial Planning Audience

**34%** of our IFP forum members are CFP™ professionals

**5/8** winners of the 2016 New Model Adviser regional adviser awards were CISI Accredited Financial Planning Firms™



Majority of firms have annual turnover growth of



Source: Accredited Financial Planning Firm™ Benchmarking Survey 2016

**75**  
Number of Accredited Financial Planning Firms™

**50-100**  
Average number of clients per planner

**£120m**  
Average assets under influence per firm

People who work with a CFP™ professional are



more likely to feel very knowledgeable about financial matters

Source: FPSB GfK International Survey 2016

# Corporate Membership Packages



| Package & Price   | Platinum £61,000+VAT  | Gold £34,500+VAT   | Annual £18,250+VAT   | Affiliate £8,000+VAT   |
|---|---|--|--|--|
| Branch Meetings   | Membership opportunities to attend events. Opportunity to submit speakers for consideration in branch meeting programme (incl. preferential positioning within speaker database). Receive communication on planned financial planning events once every two months.   | Membership opportunities to attend events. Opportunity to submit speakers for consideration in branch meeting programme (incl. preferential positioning within speaker database). Receive communication on planned financial planning events once every two months.        | Membership opportunities to attend events. Opportunity to submit speakers for consideration in branch programme. Receive communication on planned financial planning events once every two months. |  |
| CPD Endorsement   | Provider approval and endorsement charge included   | Provider approval and endorsement charge included  | Provider approval included   | 50% off annual provider approval   |
| The Financial Planning Annual Conference  | Exhibition Plus Package (large stand + four delegates)<br>Keynote speaking opportunity*<br>Advert in the conference programme. Opportunity to host a table at the Gala Evening with delegates of your choice (subject to restrictions)<br>And much more...<br>(see page 12 for details)   | Exhibition Plus Package (large stand + three delegates)<br>Speaking opportunity*<br>Opportunity to host a table at the Gala Evening with delegates of your choice (subject to restrictions)  | Exhibition Package (stand + two delegates)   | Exhibition Pod Package (pod + one delegate)  |
| CISI Events   | Opportunity to submit CPD content for CISI TV*<br>Attendance at two events (excl. Annual Conference) for two delegates to network. Receive list of attendees for chosen events for networking. The CISI will also run an Integrity at Work interactive event for the firm. Receive 50 free CISI IntegrityMatters: an online workshop and ethics test. | Opportunity to submit CPD content for CISI TV*<br>Attendance at two events (excl. Annual Conference) for two delegates to network. Receive list of attendees for chosen event for networking. Receive five free CISI IntegrityMatters: an online workshop and ethics test. | Opportunity to submit CPD content for CISI TV*   | Opportunity to submit CPD content for CISI TV*   |
| Focus Group with IFP Professional Forum Committee or Paraplanner Interest Group | A meeting with the full IFP Professional Forum Committee or Paraplanner Interest Group Committee members.   | A meeting with a selection of IFP Professional Forum Committee or Paraplanner Interest Group Committee members.  |  |  |
| Recognition of support  | Logo & profile on CISI website. Company name & URL to appear in <i>The Review</i> quarterly. One half page profile in <i>The Review</i> .   | Logo & profile on CISI website. Company name & URL to appear in <i>The Review</i> quarterly. One half page profile in <i>The Review</i> .  | Logo & profile on CISI website. Company name & URL to appear in <i>The Review</i> quarterly.   | Logo & profile on CISI website. Company name & URL to appear in <i>The Review</i> quarterly.   |
| Marketing Package   | Eight articles in e-bulletins to financial planning members.*<br>Discounted advertising rates in <i>The Review</i><br>12 month rolling action plan (reviewed monthly / quarterly)<br>Two bespoke electronic messages*   | Eight articles in e-bulletins to financial planning members.*<br>Discounted advertising rates in <i>The Review</i><br>12 month rolling action plan (reviewed quarterly)<br>A bespoke electronic message*   | Five articles in e-bulletins to financial planning members.*<br>Discounted advertising rates in <i>The Review</i><br>12 month rolling action plan (reviewed biannually)                            | Three articles in e-bulletins to financial planning members.*<br>Discounted advertising rates in <i>The Review</i><br>12 month rolling action plan (reviewed biannually) |
| Financial Planning Membership survey  | One survey  | One survey   |  |  |
| Financial Planning Week consumer campaign                                       | Included  | Included   | Included   | Included   |

\* subject to CISI approval

# Build on your Corporate Membership Package 2016-2017

If you're looking to supplement your Corporate Membership package with some more targeted opportunities, you also have the option to build your very own package to suit your requirements.

**VAT will be charged on all packages below except where stated.**

## Step 1. Pick your Corporate Membership Package (see page 3 for details)

|                            |                        |                          |                            |
|----------------------------|------------------------|--------------------------|----------------------------|
| <b>Platinum</b><br>£61,000 | <b>Gold</b><br>£34,500 | <b>Annual</b><br>£18,250 | <b>Affiliate</b><br>£8,000 |
|----------------------------|------------------------|--------------------------|----------------------------|

## Step 2. Pick your 'Annual Conference' Opportunity (see pages 10 -14 for details)

|                                   |  |  |
|-----------------------------------|--|--|
| <b>Delegate Badges</b><br>£8,000  | <b>Delegate Packs</b><br>£8,000        | <b>The Financial Planning<br/>Gala Awards Evening</b><br>£25,000 |
| <b>Welcome Evening</b><br>£12,000 | <b>Conference Mobile App</b><br>£8,000 | <b>Private Receptions</b><br>£4,000                              |

## Step 3. Pick your CISI Event Opportunities (see pages 6-17 for details)

(Affiliate Members pay a 20% premium on prices below and those who are not corporate members pay a 50% premium)

|  |   |  |
|--|---|--|
| <b>UK Annual Dinners</b><br>£2,500 - £6,500  | <b>The Paraplanner Conference &amp; Dinner 2017</b><br>Lead Sponsor* £10,500<br>Conference Exhibitor £4,250 | <b>The Paraplanner Conference &amp; Dinner 2017</b><br>Dinner Sponsor £5,250<br>Workshop Sponsor £3,500              |
| <b>The Scottish Conference &amp; Dinner 2017</b><br>2x Conference Sponsor* £5,000<br>Dinner Sponsor £2,000 | <b>CPD Workshops*</b><br>£4,100<br>per workshop<br>(VAT exempt)   | <b>The Accredited Financial Planning<br/>Firms™ Conference &amp; Dinner 2017</b><br>2x Conference Sponsor*<br>£5,000 |

## Step 4. Pick something extra

### Extra opportunities

|                                     |             |
|-------------------------------------|-------------|
| Workshop Dinners                    | £3,000      |
| Paraplanner of the Year Award       | £2,750      |
| CFP™ professional of the Year Award | £3,000      |
| Advertorial in The Review magazine  | From £3,500 |

**You've built your package, please get in touch with the financial planning team to finalise the details.**

\*speaking opportunity available, full details on request

# Event Opportunities

Our events have earned the strongest reputation from delegates over the years for supporting the financial services community. They provide you with a fantastic opportunity to directly engage with leading financial services professionals and increase brand awareness.

We run various events throughout the year, each with a different focus, objective and target audience.

## UK CPD & Networking Events Programme

The CISI offers an extensive programme of CPD and networking events across the UK, which include one-day conferences, CPD workshops and training courses for both our members and the public. Our popular networking events range from annual dinners and drinks receptions to football tournaments, quiz nights and horse race evenings.

The CISI has an established network of 24 branches in the UK and Channel Islands which provide a local organisation for Institute members. Each network has a hard-working committee whose primary role is to support the provision of continuing professional development opportunities and social and networking events for CISI members outside London.

View our events calendar at [cisi.org/events](https://www.cisi.org/events)



### The CISI's UK branch network

- A Scotland
- B Northern Ireland
- C Isle of Man
- D Lancashire & Cumbria
- E North East
- F Manchester
- G Yorkshire
- H Liverpool, Chester & North Wales
- I Birmingham
- J East Midlands
- K East Anglia
- L South Wales
- M Cotswolds
- N Northern Home Counties
- O Essex
- P Bristol & Bath
- Q Thames Valley
- R London
- S West Country
- T South Coast
- U Southern
- V South East
- W Guernsey
- X Jersey

# CPD Workshops

Our programme of CPD workshops offers a combination of learning styles around key topics designed specifically for financial planners and paraplanners. The content mixes practical application as well as technical detail. With over five hours of structured CPD in each workshop, combining them is an effective and easy way for advisers and financial planners to meet their 21 hour structured CPD requirement. From a sponsor perspective they provide the opportunity to share knowledge and get involved either through a speaking slot, or facilitation of a case study (subject to approval).

There will be two sponsorship opportunities for each CPD workshop.

## Sponsorship (£4,100)

- ✓ 45-60 minute speaking slot or opportunity to produce and facilitate a case study session (subject to CISI agreeing content)
- ✓ Two delegate places
- ✓ Company logo and profile within the delegate programme
- ✓ Opportunity to provide an insert within the delegate programme
- ✓ Opportunity to provide branding for the event
- ✓ Pre & post delegate list (excluding email addresses)





We'll be running numerous CPD workshops with different themes throughout 2017 so if you are interested in supporting any please get in touch with our financial planning team (details on the last page):

| <b>CPD Topic</b>                    | <b>Date</b>       |
|-------------------------------------|-------------------|
| Ethics                              | 18 January 2017   |
| Protection                          | 26 April 2017     |
| Retirement                          | 24 May 2017       |
| The six steps of financial planning | 21 June 2017      |
| Investment                          | 13 September 2017 |
| Soft skills                         | 15 November 2017  |



## The Six Steps of Financial Planning: Discover the difference CPD Workshop

**21 June 2017**

This back-to-basics financial planning event provides delegates with an understanding of what real financial planning is and how the six step financial planning process is put into practice. Delegates will hear from experienced practitioners and the sponsor has the opportunity to deliver a technical speaking slot to the delegates and get involved throughout the day.

# The Paraplanner Conference & Dinner

Dinner 13 June 2017

Conference 14 June 2017

This event focuses on a variety of technical and personal development topics specifically put together with paraplanners in mind. It provides over five hours of high quality networking time for the exhibitors over two days.

Attracts over 100 paraplanners.



## Dinner Sponsor (£5,250 + VAT)

- ✓ Opportunity to make an address to the delegates
- ✓ Pre & post delegate list (excl. email addresses)
- ✓ Three delegate spaces at the conference & dinner
- ✓ Logo and profile in the conference brochure
- ✓ Branded menu cards
- ✓ Opportunity to provide exclusive branding at the dinner
- ✓ Insert in the conference delegate pack
- ✓ Opportunity to purchase a stand for half price



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**ACCREDITED  
FINANCIAL  
PLANNING FIRM™**



**SOLD**

## Lead Sponsor (£10,500 + VAT) (available for 2018)

- ✓ All benefits outlined in the exhibitor package (see below)
- ✓ Recognition as lead sponsor on literature and marketing communications
- ✓ 30 minute speaking slot
- ✓ An additional delegate (excl. accommodation)
- ✓ Advert in the conference programme
- ✓ Insert in the conference delegate packs

## Workshop (£3,500 + VAT)

- ✓ 30-45 minute technical speaking slot (subject to CISI agreeing content)
- ✓ Pre & post delegate list (excl. email addresses)
- ✓ Two delegate spaces to attend the full event (excl. accommodation)
- ✓ Logo and profile in the workshop brochure
- ✓ Logo on the conference webpage
- ✓ Opportunity to purchase a stand for half price

## Exhibitor (£4,250 + VAT)

- ✓ Exhibition space
- ✓ Pre & post delegate list (excl. email addresses)
- ✓ Two delegate spaces to attend the conference & dinner (excl. accommodation)
- ✓ Logo and profile in the conference brochure
- ✓ Logo on the conference webpage

## Joint Sponsor Package (£5,000 + VAT)

- ✓ Opportunity to address the delegates (15-20 mins) as part of a wider session and get involved in the round table sessions
- ✓ Opportunity to make a brief address at the dinner
- ✓ Pre & post delegate list (excl. email addresses)
- ✓ Two delegates spaces at the conference and dinner (excl. accommodation)
- ✓ Half page advert in the conference brochure
- ✓ Logo and profile in the conference brochure
- ✓ Insert in the conference delegate pack
- ✓ Opportunity to provide branding at the event

# The Accredited Financial Planning Firms™ Conference & Dinner

**Dinner 25 April 2017**

**Conference 26 April 2017**

**Venue - DoubleTree by Hilton Hotel London -  
Victoria, 2 Bridge Place, London, SW1V 1QA**

This is an exclusive event for our Accredited Financial Planning Firms™. This is a great opportunity for two sponsors to have exclusive networking access at, and to be involved in, an event designed specifically for the top respected financial planning firms in the country.

# The Financial Planning Annual Conference & Exhibition 2017

25-27 September, Celtic Manor Resort, Newport, Wales

Our premier financial planning event will once again take place at the spectacular five star Celtic Manor Resort. This is the perfect platform to present the latest innovations and services you have to offer, achieve unparalleled access to the leading individuals in the profession and gain valuable brand exposure within the financial planning community. It is an opportunity you can't afford to miss!

## What you need to know about the Annual Conference

- ✓ It has an outstanding reputation as the largest annual gathering of the top financial planners and paraplanners in the UK
- ✓ In 2016 over 400 delegates and paraplanners attended, of which over 51% were CERTIFIED FINANCIAL PLANNER™ professionals
- ✓ Delegates include the most experienced and highly qualified financial planning professionals from across the UK, most of whom are business owners, managers and key decision makers
- ✓ The programme is designed to allow time and opportunity to engage in discussion with top professionals and make outstanding business connections



## Exhibition Packages

Over the past 29 years numerous companies have enhanced their brand, business and reputation within the financial planning arena by exhibiting at this event. With up to 500 delegates expected in 2017, it offers the opportunity to reach potential new contacts, increase brand awareness and cement relationships with the leading financial planning firms in the UK.

### Exhibition Plus Package

(£11,500 + VAT)

- ✓ 4.5 x 3m shell scheme in the exhibition hall
- ✓ Pre & post conference delegate list
- ✓ Three delegate spaces for the entire conference, including the Gala Evening (excl. accommodation)
- ✓ 60 word profile and logo within the conference brochure
- ✓ Your company name, logo and URL link on the conference website
- ✓ Opportunity to host a table at the Gala Evening with delegates of your choice (subject to restrictions)

### Exhibition Package

(£9,750 + VAT)

- ✓ 3 x 2m shell scheme in the Exhibition Hall
- ✓ Pre & post conference delegate list
- ✓ Two delegate spaces for the entire conference, including the Gala Evening (excl. accommodation)
- ✓ 60 word profile and logo within the conference brochure
- ✓ Your company name, logo and URL link on the conference website

### Exhibition Pod Package

(£4,500 + VAT)

- ✓ Single computer plinth (with opportunity to purchase branding for plinth)
- ✓ A delegate space for the conference (excl. Gala Evening and accommodation)
- ✓ Logo within the conference brochure
- ✓ Your company name, logo and URL link on the conference website



## Lead Sponsor (£61,000 + VAT)

Included in CISI Platinum Corporate Membership  
(see page 3)

- ✓ High profile marketing opportunity as lead sponsor of this event
- ✓ 4.5 x 3.0m exhibition stand (choice of position)
- ✓ Keynote speaking opportunity (subject to approval by the events committee)
- ✓ Your company name and logo on all promotional literature
- ✓ Corporate branding on the front cover of the conference brochure
- ✓ Full page advert in conference brochure
- ✓ Pre & post conference delegate list
- ✓ 200 word entry in conference programme with company logo
- ✓ Opportunity to include an insert in delegate packs
- ✓ Corporate branding in the main auditorium, including stage setting and screen display
- ✓ A VIP place on the top table at the Gala Dinner
- ✓ Four full delegate places at conference (excl. accommodation)
- ✓ 60 word profile and logo within the conference programme and on the conference website
- ✓ Your company name, logo and URL link on the conference website
- ✓ Opportunity to host a table

## Welcome Evening (£12,000 + VAT)

The welcome evening will take place on Monday 25 September 2017. It will be held in the exhibition hall and includes an informal drinks reception, buffet dinner and entertainment.

A fantastic way to gain meaningful brand exposure, network with delegates from leading firms around the UK and open the first night of conference with a bang!

- ✓ Corporate branding in key positions on entry and within the exhibition hall during the welcome evening
- ✓ Four places at the welcome evening (excl. accommodation)
- ✓ Opportunity to host an exclusive drinks reception before the opening of the exhibition hall
- ✓ Opportunity to make welcome address
- ✓ The welcome evening will include drinks and a buffet
- ✓ Recognition as sponsor on key promotional material produced by the CISI regarding the welcome evening
- ✓ 60 word profile and logo within the conference brochure
- ✓ Your company name, logo and URL link on the conference website
- ✓ Pre & post conference delegate list
- ✓ Logo included on sponsorship page of the brochure



## Conference Mobile App (£8,000 + VAT)

The official conference app allows delegates to access vital conference information before, during and after the event. By sponsoring the official conference app you'll ensure your brand is seen and recognised by every attendee at the event.

- ✓ Corporate branding within the app and all communications surrounding it
- ✓ Corporate profile listed within the app
- ✓ Sponsored alerts (timing and quantity TBC)
- ✓ Banner ad within the app
- ✓ Two spaces to attend the Gala Evening (excl. accommodation)
- ✓ 60 word profile and logo within the conference brochure
- ✓ Your company name, logo & URL link on the conference website
- ✓ Pre & post conference delegate list
- ✓ Logo included on sponsorship page of the brochure

## Delegate Badges (£8,000 + VAT)

Upon registration, all delegates receive branded conference badges with their name, personalised programme and company name printed on it. This is an excellent opportunity to ensure your brand is seen by every attendee at the event

- ✓ Corporate branding to appear on all delegate badges
- ✓ Two spaces to attend the Gala Evening (excl. accommodation)
- ✓ 60 word profile and logo within the conference programme
- ✓ Your company name, logo & URL link on the conference website
- ✓ Pre & post conference delegate list
- ✓ Logo included on sponsorship page of the brochure

## Delegate Packs (£8,000 + VAT)

Brand exposure to up to 500 delegates via a legacy product seen throughout the conference and taken home afterwards.

- ✓ Logo to appear on the front of the conference pack (1 colour)
- ✓ Two spaces to attend the Gala Evening (excl. accommodation)
- ✓ Opportunity to include an insert in the delegate packs
- ✓ 60 word profile and logo within the conference programme
- ✓ Your company name, logo & URL link on the conference website
- ✓ Pre & post conference delegate list
- ✓ Logo included on sponsorship page of the brochure





## The Financial Planning Gala Awards Evening

26 September 2017 (£25,000 + VAT)

The evening kicks off with a drinks reception, followed by the awards dinner where we celebrate the success of individuals and firms who have demonstrated they are at the peak of the financial planning profession. It's a quality formal occasion for all delegates, sponsors, exhibitors and speakers to enjoy good food, wine and company.

As the sponsor you will have the benefit of full autonomy over your sponsorship and branding. And, in addition gain additional exposure through sponsorship of our Recognising Excellence Award, designed to distinguish the very best within our industry leading Accredited Financial Planning Firms™.

- ✓ Complete autonomy as sponsor of the Gala Evening
- ✓ Opportunity to make a short address to delegates at the Gala Evening
- ✓ Formal thank you from the CISI chief executive at the beginning of the Gala Evening
- ✓ A VIP place on the top table
- ✓ Five places to attend the Gala Evening (excl. accommodation)
- ✓ Corporate branding in key positions in the Gala Evening
- ✓ Your corporate branding on Gala Dinner brochure and place cards to include full colour logo & 150 word profile
- ✓ Recognition as sponsor on key promotional material produced by the CISI regarding the Gala Evening
- ✓ 30 minute speaking opportunity (subject to approval by the events committee)
- ✓ Recognition as sponsor of the "Recognising Excellence Award" and opportunity to present award to the winner
- ✓ 3 x 2m shell scheme in the exhibition hall
- ✓ 60 word profile and logo within the conference programme
- ✓ Your company name, logo and URL link on the conference website
- ✓ Pre & post conference delegate list
- ✓ Logo included on sponsorship page of the brochure

Private Receptions £4,000 + VAT (max 3)





# The Scottish Conference & Dinner 2017

**Dinner 5 December 2017**

**Conference 6 December 2017**

Our annual Scottish Conference never fails to attract the best of the Scottish financial planning community. This event offers even greater opportunity to reach potential clients, increase brand awareness and establish meaningful relationships with the leading financial planning professionals north of the border.

## Dinner Sponsor (£2,000 + VAT)

- ✓ Opportunity to make an address to the delegates
- ✓ Pre & post delegate list (excl. email addresses)
- ✓ Two delegate spaces at the conference & dinner
- ✓ Logo and profile in the conference programme
- ✓ Branded menu cards and the opportunity to provide exclusive branding at the dinner
- ✓ Insert in the conference delegate pack

## Joint Sponsor (£5,000 + VAT)

- ✓ 30 minute speaking slot
- ✓ Pre & post delegate list (excl. email addresses)
- ✓ Two delegate spaces at the conference and dinner (excl. accommodation)
- ✓ Half page advert in the conference programme
- ✓ Logo and profile in the conference programme
- ✓ Insert in the conference delegate pack
- ✓ Opportunity to provide branding at the event

# UK Annual Branch Dinners 2017

Sponsorship of CISI Annual Branch Dinners will ensure your brand is recognised by key decision makers. Our popular dinners are a great networking opportunity for members and clients and consist of pre-dinner drinks, a three course meal, after dinner entertainment and post-dinner drinks. This year the dinner will be extra special as we are promoting and celebrating our 25th anniversary.

Guest speakers in the past have ranged from local comedians to Marcus Brigstocke and John Culshaw, sporting stars such as Kevin Keegan, political figures such as the Right Honourable Lord Prescott, as well as well-known figures such as radio presenter, Justin Webb.

Dinners are hosted by our 24 UK branch committees in a variety of venues from hotels and sports clubs to historic venues such as the Belfast Waterfront Hall and Norwich Cathedral.

Reach 50-200 members, industry leaders and practitioners.



A range of sponsorship packages are available and can be tailored to suit your organisation

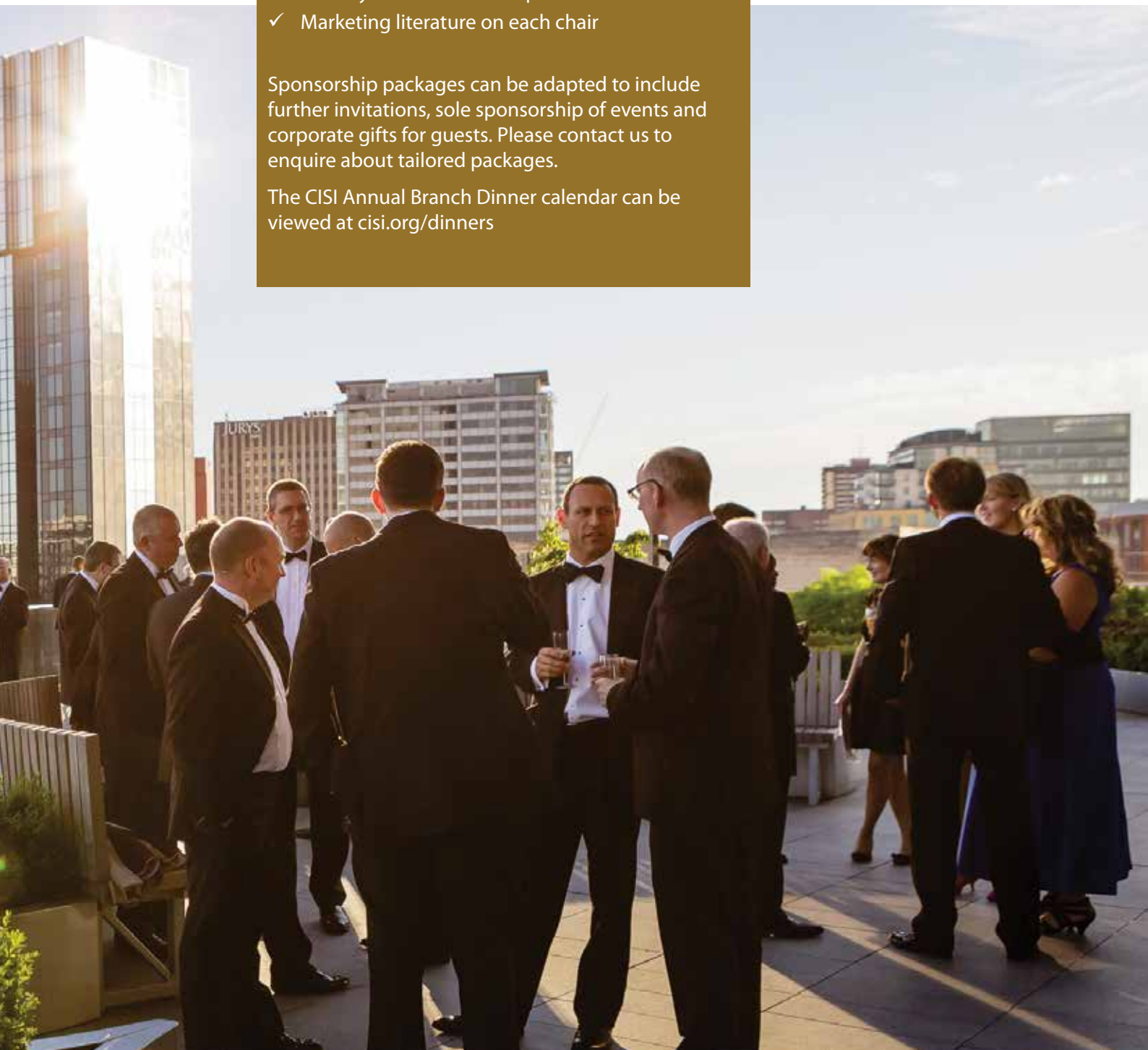
(From £2,500 - £6,500+VAT)

Opportunities can include:

- ✓ Logo/mention on invitations to all members of the branch
- ✓ Logo/mention on all dinner literature
  - events calendar webpage
  - table plan
  - guest booklet/menu.
- ✓ Marketing stand in the pre-drinks area
- ✓ Thank you in President's speech at event
- ✓ Marketing literature on each chair

Sponsorship packages can be adapted to include further invitations, sole sponsorship of events and corporate gifts for guests. Please contact us to enquire about tailored packages.

The CISI Annual Branch Dinner calendar can be viewed at [cisi.org/dinners](http://cisi.org/dinners)



# CPD Endorsement



## Why get your CPD activities endorsed by the CISI?

With the FCA requirement for all retail investment advisers to complete a minimum of 35 hours (minimum of 21 hours structured) of CPD annually, it remains a vital aspect of their day to day business.

Having your CPD activities endorsed by us means that they will be promoted to our members. Advisers' time is precious and concentrating their search on endorsed activities is an efficient way of sourcing high quality provision to meet an identified CPD need.

More importantly, it gives the individuals who undertake your activities peace of mind that they are suitable and will count towards their annual CPD requirements.

## How to get your CPD activities endorsed by the CISI

It's a very straightforward process: you simply need to send us a completed endorsement form (available from [cisi.org/endorsedCPD](http://cisi.org/endorsedCPD)) as well as the respective CPD activity materials. Turnaround time is within five working days depending on the size and complexity of the activity.

## What is the cost?

£750.00 Annual Provider Fee (waived for full Corporate Members; discounted by 50% for CISI Affiliate Corporate Members)

Plus

£250 Endorsement Fee per activity (waived for CISI Gold and Platinum Corporate Members)

## What activities are our members looking for?

Members should undertake CPD activities that are relevant to their role but should cover one or more of the following areas:

Technical Knowledge

Professional Standards and Compliance

Ethics

Financial Planning Practice Management

Personal Development

## How are endorsed activities promoted to our members?

There are dedicated pages for endorsed CPD on both the public CISI website and the dedicated members' area.

The logos of all providers of endorsed activities are displayed on the public site, along with the endorsement criteria and process.

Details of the specific endorsed activities are listed within the dedicated members' area. Each activity listing includes a click through to the provider's website enabling members to find more details about the activity, the provider, and where applicable, to make a booking.

For full details of the CPD endorsement process, including the detailed endorsement criteria, process map and guidance, please visit [cisi.org/endorsedCPD](http://cisi.org/endorsedCPD).

# Financial Planning Week

8-12 May 2017

## What is Financial Planning Week?

Now in its ninth year, Financial Planning Week is our national consumer awareness campaign which aims to help consumers improve their financial “fitness”.

Over the years, this campaign has attracted praise for its simplicity and jargon free approach. The CISI’s “Wayfinder” website will act as a useful marketing device for the campaign, allowing us more scope to connect with people and encourage them to take action when it comes to their finances – as well as to highlight the benefits of taking professional financial planning advice. The website provides the public with useful tips, information and guidance about how to go about improving their financial “fitness”. The national consumer media (both financial and mainstream “lifestyle”) will also be engaged in a major PR campaign, to provide coverage and exposure for the issues and activities surrounding the initiative. Finally, CISI members, including our Accredited Financial Planning Firms™, will be involved with PR as well as offering consumers free financial surgeries and many other initiatives.

This is the one week of the year when financial planning steps into the national media spotlight. Don’t miss this opportunity to associate your organisation and brand with its powerful messages.

## How can you get involved?

Financial Planning Week provides an outstanding opportunity to promote your brand in association with an initiative which is a call to action to assist consumers to build a better financial future.

We look forward to engaging with you, exploring how we can work together to achieve mutual objectives from this consumer awareness campaign.

## How you can assist

- Help us with PR** Use the contacts you already have to help build the profile of Financial Planning Week and awareness of its aims.
- Issue a press release** Before or during Financial Planning Week issue a press release (or a series if you can) declaring your support for the campaign and linking relevant consumer projects or initiatives to it. The CISI would be delighted to supply a comment for inclusion in your release/s if required, or a template for use.
- Use the logo** Promote Financial Planning Week on your website by using the logo and also provide a link from it to the Financial Planning Week website. Just ask us to send over the logo to you.
- Help with content** Information or tools which are relevant. You could help with literature and articles to be provided for consumers or financial planners alike.
- Use social media** Follow @CISI on Twitter and use the hashtag #fpw2017 in your comms and share our Facebook page and LinkedIn content.

# At a Glance

## Corporate Membership

Platinum £61,000 + VAT    Gold £34,500 + VAT    Annual £18,250 + VAT    Affiliate £8,000 + VAT

## Events

| Event                                       | Date                | Location                | Cost   |
|---|---------------------|-------------------------|--|
| UK Annual<br>Branch Dinners                 | Various             | Various                 | £2,500 - £6,500 + VAT  |
| CPD Workshops                               | Various             | Various                 | Sponsor (max 2) - £4,100   |
| The Accredited Firms<br>Conference & Dinner | 25 - 26 April 2017  | London                  | Sponsor (max 2) - £5,000 + VAT   |
| The Paraplanner<br>Conference & Dinner      | 13-14 June 2017     | Midlands<br>(Venue TBC) | Lead - £10,500 + VAT<br>Dinner - £5,250 + VAT<br>Exhibitor - £4,250+VAT<br>Workshop - £3,500+VAT |
| The Scottish<br>Conference & Dinner         | 5 - 6 December 2017 | Venue TBC               | Sponsor (max 2) - £5,000 + VAT<br>Dinner - £2,000 + VAT  |

Affiliate members pay a 20% premium on the prices above; those who are not corporate members pay a 50% premium.

## The Financial Planning Annual Conference, 25-27 September 2017 Celtic Manor Resort, Newport, Wales

|   |                   |  |
|---|-------------------|--|
| Exhibitor                                     | From £4,500 + VAT |  |
| Welcome Evening                               | £12,000 + VAT     |  |
| The Financial Planning<br>Gala Awards Evening | £25,000 + VAT     | Full list of opportunities can be found on pages 10-14 |

## Other opportunities

| Sponsorship             | Cost  |
|-------------------------|---|
| Financial Planning Week | Supporter acknowledgement is included in corporate membership. There are opportunities to discuss bespoke arrangements to enhance your brand awareness. |
| CPD Endorsement         | £2,500 (Up to 10 endorsements)<br>£3,750 (Up to 25 endorsements)<br>£7,000 (Up to 50 endorsements)  |

# Contacts

If you are interested in taking up any of the opportunities mentioned in this booklet, please contact:



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Prices correct as of  
November 2016