

FINANCIAL BEHAVIOR IN RETIREMENT

NOVEMBER 16-17, 2009 | THE WESTIN PHILADELPHIA | PHILADELPHIA, PA

Building a Successful Retirement Practice for 2010 and Beyond

ABOUT THE EVENT

Although there has been a great deal of research on behavioral finance and decision making as individuals accumulate wealth, there is little awareness of people's behavior as they spend down that wealth during retirement. Yet this is the focus of much of the financial planning industry, and is likely to be a central concern of your practice in the coming years.

In today's economic environment, with the coming retirement of 78 million baby boomers, understanding the way people make financial choices in retirement becomes of paramount importance. This is the first generation to retire, primarily, with less pension income than their forebears. As a result, the management of individual wealth will make the difference between a comfortable retirement and a precarious one.

Not surprisingly, individuals who are approaching retirement age are increasingly concerned. They worry about how to pay for healthcare (now the single biggest retirement concern) and whether their money will last. Advisors will experience increasing demands on their time throughout this period that the Social Security Administration refers to as the "silver tsunami," and will need to develop expertise on the emotional as well as the financial needs of their aging clients.

This timely conference will examine:

- The unusual challenges and opportunities retirees present for advisors
- What we know about the way retirees make financial decisions
- How advisors can manage the emotional needs of retired clients
- What unmet needs the financial services industry should be looking to fill

WHY YOU SHOULD SPONSOR OR EXHIBIT

This event is the ONLY conference that helps advisors address the unique financial AND emotional needs of retirees. As such, the conference attracts advisors who are actively seeking solutions and advice to help them take their business to the next level. Financial Behavior in Retirement is a great platform to promote your products and services to these advisors in need of your assistance.

WHO YOU WILL MEET

Participants of the Financial Behavior in Retirement Conference are thought leaders and innovators in the independent, wirehouse, and banking advisory communities including:

- RIAs
- Wealth Managers
- C-Level Executives from Top Planning Firms, Broker-Dealers, and other Financial Institutions
- Private Bankers



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FINANCIAL PLANNING **onwallstreet** BANK
Investment Consultant

EXHIBITS

Standard Exhibit Package (\$4,900) Conference and Exhibition presence

- 8 X 10 exhibitor space
- 2 Full Event registrations
- Pre- and Post- conference attendee mailing list
- 2 complete sets of conference registration materials, including documentation book
- Half page B&W ad in the conference documentation book
- Inclusion in all house advertising promoting this conference
- Logo and 50-word company profile in conference documentation book
- Link from SourceMedia Conference Web-site to firm's Web-site
- Firm name or logo included in direct-mail brochure

SPONSORSHIP PACKAGES

Diamond Leadership Package (\$25,000) Two Available

Speaker/Program Participation

Industry Innovation Session - Our Industry Innovation Sessions (IIS) consist of an in depth, 75-90 minute presentation from our Diamond Sponsor. These executive sessions represent a fantastic opportunity for participants to gain an intimate knowledge of the Sponsoring company's offerings and solutions, as well as excellent face-to-face interaction. The IIS's will take place during lunch – which will be served to attendees. These sessions are free to conference attendees and the sponsor will be provided list of all those attending the session. A 3 X 9 "meter board" sign will be onsite promoting the session near registration.

Onsite Benefits

- Premium location 8 X 20 exhibitor space
- 7 Full event registrations
- 10 Full event registrations for clients
- Diamond Status recognition – Slide show running during session
- Event bag insert or seat drop
- Company name included in all on-site sponsorship signage as
- Premium ad placement (P4C) in the conference documentation book
- Inclusion in all house advertising promoting this conference
- Logo and 50-word company profile in conference documentation book
- Link from SourceMedia Conference Web-site to firm's Web-site
- Firm name or logo included in direct-mail brochure (if signed by deadline)
- Promotion of the Industry Innovation Session in the conference
- Inclusion in all house advertising promoting this conference
- Booth Signage designating Diamond level status
- Pre- and Post- conference attendee mailing list

ENHANCED BRANDING:

Diamond Sponsors Choose One of the following options:

- **Registration & Lanyard Sponsor (1 available)**
 - Registration sponsor branded in registration area throughout the entire conference
 - Custom badge lanyards distributed to all attendees includes company name/logo
- **Main Night Reception Sponsor (1 available)**
 - Branded décor including signs, napkins etc with Sponsor logo
 - Sponsor logo added to the conference agenda as reception sponsor
- **Conference Tote Bag Sponsor (1 available)**
 - Sponsor logo displayed on conference tote bag distributed to all attendees

For more information on participating in this event contact:
Chris Frey at 212.803.6568 or christopher.frey@sourcemediacom.com

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SPONSORSHIP PACKAGES (Continued)

Platinum Sponsorship Package (\$15,000) **Four Available**

Onsite Benefits

- 8 X 10 exhibitor space
- 6 Full Event registrations
- 7 Full event registrations for clients
- Prominent placement all signage and promotion at the event
- Platinum Status recognition – Slide show running during session
- Event bag insert or seat drop
- Company inclusion in all on-site sponsorship signage as
- Reserved premium ad placement (P4C) in the conference
- Inclusion in all house advertising promoting this conference
- Logo and 50-word company profile in conference documentation book
- Link from SourceMedia Conference Web-site to firm's Web-site
- Firm name or logo included in direct-mail brochure
- Booth Signage designating Platinum level status
- Pre- and Post- conference attendee mailing list

Gold Sponsorship Package (\$10,000) **Four Available**

Onsite Benefits

- 8 X 10 exhibitor space
- 4 Full Event registrations
- 5 Full event registrations for clients
- Prominent placement all signage and promotion at the event
- Gold Status recognition – Slide show running during session
- Company inclusion in all on-site sponsorship signage as
- Reserved premium ad placement (PBW) in the conference
- Inclusion in all house advertising promoting this conference
- Logo and 50-word company profile in conference documentation book
- Link from SourceMedia Conference Web-site to firm's Web-site
- Firm name or logo included in direct-mail brochure
- Inclusion in all house advertising promoting this conference
- Booth Signage designating Platinum level status
- Pre- and Post- conference attendee mailing list

ENHANCED BRANDING:

Platinum Sponsors choose one of the following options:

- **Internet Station Sponsor** (1 available)
 - Sponsoring company to develop "Home Page Portal" to be displayed on each computer (w/approval) at the station
- **Conference Manual** (1 Available)
 - Logo on the front and a Full page color ad on the back cover of the conference manual
- **Pocket Agenda Sponsors** (1 Available)
 - Company logo on front of pocket agenda to be handed out to all registrants
- **Bottled Water Sponsorship** (1 Available)
 - 500 bottles of water exclusively distributed to attendees inside the general assembly for the length of the conference - each bottle will display the sponsoring company's logo

ENHANCED BRANDING:

Gold Sponsors choose one of the following options

- **Hard Candy Sponsorship** (1 Available)
 - Wrapped hard candy with company logo distributed to all attendees inside the general assembly for the length of the conference
- **Break Sponsor** (3 Available)
 - Custom napkins & signage with company logo branded on each to be place in break area
- **Breakfast Sponsor** (2 Available)
 - Custom napkins & signage with company logo branded on each to be place in break area

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