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FINANCIAL PLANNING WEEK 2019
SEMAINE DE LA PLANIFICATION FINANCIÈRE

FP Canada™
Advancing Professional Financial Planning

NOVEMBER 17-23, 2019

FPW PLATINUM TITLE SPONSOR

BUSINESS CAREER COLLEGE

INDUSTRY GUIDE

Tips, tools & opportunities to help your organization make the most of Financial Planning Week.

CONTENT:

FINANCIAL PLANNING WEEK

We are pleased to provide the official Industry Guide for Financial Planning Week 2019. In this helpful document you will find tips, tools and opportunities to help you make the most of this important week.

This is your chance to increase your organization's exposure, rally your financial planning teams, connect with clients and prospects, and enhance your team's professional skills.

Learn more about FP Canada's extensive awareness campaign, discover resources to help your clients understand the importance of financial planning, and explore ideas around how to use Financial Planning Week to educate and inspire your team.

NATIONAL LOGO AND TAGLINE

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FINANCIAL PLANNING WEEK 2019

SEMAINE DE LA PLANIFICATION FINANCIÈRE

We encourage you to include the Financial Planning Week 2019 logo on all of your materials.

Reflecting the truly national scope of Financial Planning Week, the bilingual logo recognizes the engagement of CFP® professionals, Pl. Fin., FPSC Level 1® Certificants in Financial Planning, financial services firms, educators and consumers from coast to coast. Since its launch in 2009, Financial Planning Week has become closely integrated with awareness activities, educational events, research studies and other initiatives each November.

OPPORTUNITY: Include the logo on all of your Financial Planning Week materials, including websites, posters, brochures, research studies and media. You can download the logo at fpcanada.ca/financial-planning-week.

FPW AT A GLANCE

2019 ADVERTISING & PROMOTIONS

SAT 16	SUN 17	MON 18	TUES 19	WED 20	THURS 21	FRI 22	SAT 23
GLOBE AND MAIL SPECIAL SECTION PUBLISHED	GLOBE AND MAIL ONLINE ADS	GLOBE AND MAIL ONLINE ADS	GLOBE AND MAIL ONLINE ADS	GLOBE AND MAIL ONLINE ADS	GLOBE AND MAIL ONLINE ADS	GLOBE AND MAIL ONLINE ADS	GLOBE AND MAIL ONLINE ADS
	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA	SOCIAL MEDIA
	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT	INFLUENCER ENGAGEMENT
	FACEBOOK ADS	FACEBOOK ADS	FACEBOOK ADS	FACEBOOK ADS	FACEBOOK ADS	FACEBOOK ADS	FACEBOOK ADS
		MEDIA APPEARANCES	MEDIA APPEARANCES	MEDIA APPEARANCES	MEDIA APPEARANCES	MEDIA APPEARANCES	

FPW AT A GLANCE

2019 EVENTS

SUN 17	MON 18	TUES 19	WED 20	THURS 21	FRI 22	SAT 23
		CELEBRATION OF THE PROFESSION Reception 5:45 – 6:45 pm	ETHICS BREAKFAST SESSION 7:45 – 9:30 am **Sheraton Centre, Toronto**		ETHICS BREAKFAST SESSION 7:45 – 9:30 am **Hyatt Regency, Vancouver**	
		Dinner / Awards 7:00 – 9:30 pm **Sheraton Centre, Toronto**	CFP PROFESSIONAL SYMPOSIUM 10:00 am – 4:00 pm **Sheraton Centre, Toronto**		CFP PROFESSIONAL SYMPOSIUM 10:00 am – 4:00 pm **Hyatt Regency, Vancouver**	

FP CANADA'S 2019 CAMPAIGN WILL REACH MILLIONS OF CANADIANS

Our Financial Planning Week 2019 awareness campaign will reach millions of Canadians, educating them about the importance of financial planning and working with a professional. This year's advertising and promotional activities will include:

THE GLOBE AND MAIL FINANCIAL PLANNING SPECIAL FEATURE

This special section in the newspaper is read by 1.4 million Canadians, and will live on for three months online, with content pushed out through advertising, influencers and social media. Let your clients know about the Globe and Mail supplement by distributing it online or by making it available in any of your branches.

OPPORTUNITY: Book space in *The Globe and Mail* Financial Planning Special Feature. Contact Richard Deacon at rdeacon@globeandmail.com or 1.604.631.6636.

INVESTMENT EXECUTIVE

Advertising in the online and print editions will reach more than 42,000 readers across the country.

SOCIAL MEDIA ADVERTISING

Consumer-focused messages will be viewed more than 1 million times through Facebook advertising. Influencer engagement will amplify our reach across all platforms.

FINANCIAL PLANNING FOR CANADIANS

FinancialPlanningForCanadians.ca, has over 100 informative articles, videos and infographics, and receives more than 92,000 visits per year.

MEDIA OUTREACH

During Financial Planning Week and all through the year, FP Canada works with the media to promote the importance of getting qualified financial planning help. This year's media outreach will include appearances by FP Canada's Consumer Advocate, Kelley Keehn, who will share the results of new research studies that will be of interest to Canadian consumers.

OPPORTUNITY: Arrange interviews with Kelley Keehn by contacting Emma Ninham at 416.640.5525 ext. 239, 437.986.5746 or emman@wearemaverick.com.

EDUCATING CLIENTS

Help your clients learn about financial planning and the importance of working with a professional planner.

CONSUMER RESEARCH

FP Canada is releasing new consumer-focused research and infographics leading up to Financial Planning Week and in the months following. We encourage you to release your own findings as well as ours.

OPPORTUNITY: Share the research on social media or use it as a conversation starter with your clients. New and existing research can be found at: financialplanningforcanadians.ca/research

CONSUMER RESOURCES

Financial Planning Week is the ideal time to inspire your clients and prospects to take the next step toward financial well-being by engaging in financial planning with a professional financial planner. Encourage your clients to learn more about the value of financial planning with these resources:

- **FinancialPlanningForCanadians.ca** includes more than 100 articles, videos and infographics to help Canadians use financial planning to navigate through various stages of their lives. Include a link to the site or any of its resources in consumer-focused communications.
- Offer your clients a **free subscription** to **Here's the Plan™ consumer newsletter**. It's an easy way to help your clients learn more about financial planning. Subscribe at: FinancialPlanningForCanadians.ca
- Share a link to **Find a Planner Tool** and encourage your clients to take the next step.

SOCIAL MEDIA UPDATES

We post about the importance of financial planning and of working with a professional financial planner on Twitter, Facebook, LinkedIn, YouTube and Instagram. Browse our collection of social media posts to support your efforts and easily maximize your exposure leading up to and during Financial Planning Week. Don't forget to include the hashtag **#FPW2019** in your posts and encourage your followers to do the same.

OPPORTUNITY: See more ways to connect through social media on pages 7 and 8.

7 TIPS FOR RAISING CLIENT AWARENESS OF FINANCIAL PLANNING WEEK AND THE IMPORTANCE OF FINANCIAL PLANNING

1. Have your teams update their profiles on **Find a Planner Tool**, which receives 19,000 pageviews on average per month, to ensure they are current and comprehensive. Profiles may be updated by contacting the Stakeholder Support team at **info@fpcanada.ca**.

2. Access FP Canada's **Financial Planner Toolbox** to communicate to clients the value of working with a CFP professional. The toolkit includes brochures, videos, infographics and research studies.

3. Offer your clients a **free subscription** to **Here's the Plan™ consumer newsletter**. It's an easy way to help your clients learn more about financial planning.

4. Explore **FinancialPlanningForCanadians.ca** and share articles and videos with your team, clients and social media networks.

5. Issue your own **financial planning related news and research** to local and national media leading up to and during Financial Planning Week. Engage your communications staff or public relations firm to secure newspaper, radio and television coverage.

6. Include **FP Canada consumer research** in your materials such as the recent *Housing Affordability Survey*.

7. Organize a digital branch campaign by adding the bilingual Financial Planning Week **logo and tagline** to your team's email signature.

8. Utilize FPW to **reach out to your clients** by arranging seminars in their local areas and send out short notes of appreciation to encourage them to update or review their financial plans.

BOOKMARK THESE FP CANADA PAGES

Stay up-to-date on all the latest Financial Planning Week news and announcements by following our social media accounts and bookmarking our websites.

FP CANADA WEBSITE:	fpcanada.ca	TWITTER:	twitter.com/OfficialFPCan
FPW WEBSITE:	financialplanningweek.ca	LINKEDIN:	linkedin.com/company/fpcanada
CONSUMER WEBSITE:	financialplanningforcanadians.ca	YOUTUBE:	youtube.com/c/FPCanadaOfficial
FACEBOOK:	facebook.com/OfficialFPCanada		

8 WAYS TO CONNECT WITH YOUR STAKEHOLDERS ON SOCIAL MEDIA

1. Use the hashtag **#FPW2019** for all posts during FPW. Spread the word about the long and short-term benefits of sound financial planning.

2. Like, retweet and/or share updates from **FP Canada social media accounts**.

3. Share statistics from **FP Canada consumer research**.

4. Join the conversation by tweeting remarks from **FP Canada-hosted Financial Planning Week events**, including the Celebration of the Profession Dinner, Ethics Breakfast webinar and CFP Professional Symposium.

5. Post messages to help clients and stakeholders understand the need for financial planning and your organization's commitment and expertise in providing this invaluable service.

6. Post and share **FP Canada's videos** to help consumers get started on the path to financial confidence. All videos are available at: financialplanningforcanadians.ca/videos/

7. Start a blog and expand your networks, using content from **FinancialPlanningForCanadians.ca**.

SAMPLE TWEETS

Hear these speakers share their knowledge and passion during Financial Planning Week. #FPW2019. @OfficialFPCan
http://www.financialplanningweek.ca/speakers

Financial Planning Week 2019 takes place November 17-23. Learn how to get involved. #FPW2019 @OfficialFPCan
https://www.financialplanningforcanadians.ca/financial-planning-week

We are excited to be a part of Financial Literacy Month and participate in #FPW2019. Join us to learn, network and grow the profession.
http://www.financialplanningweek.ca/

Canadians rank money as their greatest stress. Learn how #FinancialPlanning can help you live life confidently. https://www.financialplanningforcanadians.ca/financial-planning/5-ways-combat-money-anxiety

7 out of 10 Canadians worry a lot about their financial situation. A CFP professional can help. Don't delay:
https://www.fpcanada.ca/findaplanner

CELEBRATION OF THE PROFESSION DINNER

Nov 19, 2019 at Sheraton Centre, Toronto

$119 Individual Seats • $952 Branded Tables of Eight Seats

Sponsored By: TD

Network with the most influential people in financial planning. This must-attend event gathers 250 high-profile decision-makers in the financial services industry, regulators and representatives from all levels of government to celebrate outstanding contributors to the financial planning profession. **This year's event will include remarks from Ontario's Minister of Finance, the Honourable Rod Phillips, a keynote address from Canadian Olympian and motivational speaker Caroline Ouellette, and will be emceed by Erica Sigurdson, an award-nominated stand-up comedian, writer and producer.**

SYMPOSIUM:

Nov 20, 2019 at Sheraton Centre, Toronto
Nov 22, 2019 at Hyatt Regency, Vancouver

$349 Individual Seats • $3,330 Branded Tables of Ten

3 CE credits in the Financial Planning category and 1 CE credit in the Practice Management category.

This full day of CE will provide attendees with practical tips and tools for meeting the evolving needs of clients and amplifying service through more relevant consultative approaches and better relationship management. This year's theme—Reinventing Relevance—will include the following topics:

We Need To Talk: How To Have Better Conversations with Celeste Headlee; **The Implementation Gap** with Michelle Hilscher; **Navigating Digital Transformation and Managing Millennial Disruption** with Andrew Au and **A Deep Dive into Behavioural Economics** with Brooke Struck.

ETHICS BREAKFAST SESSION:

Nov 20, 2019 at Sheraton Centre, Toronto
Nov 22, 2019 at Hyatt Regency, Vancouver

$139 Individual Seats • $1,390 Branded Tables of Ten Seats

1 CE credit in the Professional Responsibility category and 0.5 CE credit in the Financial Planning category.

Sponsored By: IG WEALTH MANAGEMENT

This year's Ethics Breakfast Session will explore conflicts of interest arising from a variety of situations. Panelists will examine your professional and ethical obligations through reference to case studies, providing practical tips and insights to help you understand your obligations as a professional financial planner and the intersection between professional and regulatory obligations. **The Panel will be moderated by Damienne Lebrun-Reid, and will feature: Irene Winel, Karen McGuinness, Elizabeth King, Irene Winel, Jeff Mount, and Mark Wang.**

ETHICS BREAKFAST WEBINAR:

Nov 20, 2019

$139

1 CE credit in the Professional Responsibility category and 0.5 CE credit in the Financial Planning category.

Unable to attend the Ethics Breakfast in person? In response to requests for greater access to Financial Planning Week events, for the first time ever, FP Canada will be hosting a live webcast of the Toronto Ethics Breakfast. Register for the webinar to participate in the session remotely.

CELEBRATION SPEAKERS

We are proud to be presenting the following lineup of topics and speakers at this year's Financial Planning Week:

KEYNOTE ADDRESS

CAROLINE OUELLETTE

Caroline Ouellette's record speaks for itself.

A pillar of Canada's national hockey team since 1999, she has also been a source of inspiration through the years as a player for the Montreal Les Canadiennes, the Canadian Women's Hockey League and the University Minnesota-Duluth Bulldogs. The Montreal-born athlete has enjoyed an impeccable Olympic career.

Ouellette has never lost a final, winning Olympic gold in Salt Lake City in 2002, Torino in 2006, Vancouver in 2010 and Sochi in 2014. The forward contributed to winning gold with two goals during the four most decisive games. Ouellette was also the hero of the World Championship final in Burlington, US, in 2012. Her winning goal, scored in overtime, ensured the Canadians' sixth gold medal in 11 years. Caroline is an assistant captain with the National team since 2006 and was captain of the 2014 Sochi team.

She is third all-time in games played with the national team, behind only Hayley Wickenheiser and Jayna Hefford. Ouellette ranks third all-time in scoring with 84 goals and 150 assists for 234 points in 205 international games.

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MC, CELEBRATION OF THE PROFESSION DINNER

ERICA SIGURDSON

As a regular performer on CBC Radio's smash hit 'The Debaters' and Canadian Comedy Festival favourite, Erica Sigurdson is one of the most accomplished comedians working in Canada. She has appeared at every major Canadian Comedy Festival, won a Leo Award for Outstanding Comedy Screenwriting and even traveled to Afghanistan to entertain the Canadian troops.

In addition to her twenty-seven appearances on The Debaters, Erica has recorded five television specials in 2013 alone.

In addition to being an accomplished performer, Erica has worked in the writers' room of many Canadian television productions, including CBC's MR. D and co-writing the 21st Annual Gemini Awards. Erica Sigurdson is a comedian who has charmed and joked her way into the top of the Canadian comedy world.

CELESTE HEADLEE

KEYNOTE: WE NEED TO TALK: How To Have Better Conversations

Celeste Headlee is an award-winning journalist, professional speaker and author of Heard Mentality and We Need To Talk: How To Have Conversations That Matter. In her 20-year career in public radio, she has been the Executive Producer of On Second Thought at Georgia Public Radio and anchored programs including Tell Me More, Talk of the Nation, All Things Considered, and Weekend Edition. She also served as co-host of the national morning news show, The Takeaway, from PRI and WNYC, and anchored presidential coverage in 2012 for PBS World Channel. Celeste's TEDx Talk sharing 10 ways to have a better conversation has over 19 million total views to date.

Inject new energy into the discovery process and build deeper relationships with clients by learning how to improve your conversations. In a time when conversations are often minimized to a few words in a text message and lack of meaningful dialogue abounds, Celeste Headlee sheds a much-needed light on the lost and essential art of conversation. In this engaging presentation, Celeste draws on research in neuro and social science to increase understanding of how we relate with one another.

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BUSINESS CAREER COLLEGE

MICHELLE HILSCHER

The Implementation Gap

Michelle Hilscher, Ph.D. is a Director at BEworks, where she manages the team's Discovery and Behavioural Diagnostics research practice. At BEworks, Michelle applies behavioural science to solve complex challenges in the financial services industry. Michelle has previously been an invited speaker at the Investment Funds Institute of Canada's (IFIC) 2018 Annual Leadership Conference where she discussed Behavioural Economics (BE) applied to enhance disclosure practices, and the OECD's Conference on Behavioural Insights, where Michelle discussed how BE can be applied as a strategy alternative for policymakers and regulators.

Why is it that some clients seek out financial planning advice, yet they fail to follow through and implement their financial plan? This session will offer insights from a research project currently underway by the FP Canada Research Foundation™ and BEworks, examining the so-called 'implementation gap'—the factors that prevent clients from implementing the financial planning advice they receive. Learn what contributes to this gap and how you can improve the likelihood that your clients will execute the plans you build for them.

Toronto Sponsored By:

Fidelity INVESTMENTS

ANDREW AU

Navigating Digital Transformation & Managing Millennial Disruption

Andrew Au is the co-founder and President of Intercept Group, a marketing agency that helps global brands win the head, heart and hands of Gen-Y and Z'ers across North America. Intercept empowers some of the largest global brands, including the likes of Microsoft, 3M, and 7-Eleven, as they shift from mass to millennial.

Through his innovative work at the agency, Andrew was the youngest ever person to join the Entrepreneurs Organization at the age of 22. In 2016, he was among the Forbes 30 Under 30 for Marketing & Advertising. As a regular contributor to Forbes, he offers his millennial expertise in articles and podcasts, discussing an array of topics from the inner workings of the Met Gala to understanding millennials to digital disruption.

How are Millennial values and digital technology impacting business and the economy? These disruptive forces have set a new equilibrium for organizations, from how they engage their customers to how they motivate their employees to how they innovate their products and services. This captivating session will explore strategies for navigating disruption and future-proofing your business, leaving you enlightened and eager to drive change.

BROOKE STRUCK

Dive Deep Into Behavioural Economics

Brooke Struck is Research Director at The Decision Lab, a non-profit firm conducting research and consulting in behavioural science. He holds a doctorate in philosophy of science. His dissertation research focused on the relationship between quantitative and qualitative research methods, and the relationship between research and other social systems such as language, history and politics. Since finishing his academic work, Dr. Struck has worked in science and innovation policy, first within the Canadian federal government, and then in the private sector at Science-Metrix. In recent years, he has been researching the interface of big data analytics with organizational decision-making structures, especially in policy-making contexts.

How can you help clients answer questions that they don't even know they have? In this session, Dr. Brooke Struck will examine the interaction of human behaviour, machine learning and AI, and the impacts on the financial planning discovery process, analysis and decision making.

EDUCATING EMPLOYEES

Support and inspire your team to participate in this important week.

USE FINANCIAL PLANNING WEEK EVENTS TO EDUCATE AND INSPIRE YOUR TEAM

1. Secure a **branded table** at FP Canada-hosted events or purchase individual seats to reward or inspire team members. Please do not delay in securing your seats—all events sold out in 2018.

2. Encourage your staff to take advantage of the events to help complete their annual **Continuing Education (CE)** requirements. The CFP Professional Symposium qualifies for **3 FP Canada-Approved CE Credits in the Financial Planning category and 1 FP Canada-Approved CE Credit in the Practice Management category.**

3. If your colleagues are being honoured as members of the **President's List**, acknowledge their accomplishments in internal newsletters and news releases and attend the **Celebration of the Profession Dinner** to support and celebrate their achievements.

REGISTER NOW

RECOGNIZE STAFF WHO HAVE ACHIEVED CFP CERTIFICATION AND SUPPORT THOSE ON THE PATH TO CFP CERTIFICATION

1. **Celebrate your colleagues:** Circulate a list of new CFP professionals on your team to recognize your newly certified colleagues.

2. **Expand your team:** Recruit your next top performers through the networking opportunities offered at **FP Canada-hosted Financial Planning Week events**.

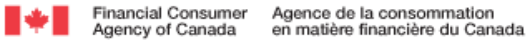
FP CANADA IS HERE TO HELP

If you have questions, comments or ideas about Financial Planning Week and how your organization can get involved in this important week for Canadians, please contact **Ralph Vizl, Chief Strategy Officer, at** rvizl@fpcanada.ca.

We look forward to seeing you during Financial Planning Week.

FPW 2019 SPONSORS

THANK YOU TO OUR SPONSORS FOR FINANCIAL PLANNING WEEK 2019



FPW 2019 EXHIBITORS

VISIT OUR EXHIBITORS FOR FINANCIAL PLANNING WEEK 2019

NaviPlan® by Advicent

Advocis The Financial Advisors Association of Canada

Equitable Bank

PlanPlus Global

idfa Institute for Divorce Financial Analysts

INVESTMENTS & WEALTH INSTITUTE™ formerly IMCA

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