

CENTER FOR DUE DILIGENCE
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Date: April 14, 2008
To: Exhibitors & Providers
Subject: **2008 ADVISOR CONFERENCE:
Exhibitor Information & Form**
From: CFDD

The information in this document is designed to give vendors a brief summary of the CFDD's October 13-15, 2008 Advisor Conference exhibition package.

For information applicable to individual registration, the agenda, wholesaler training, sponsorships and other conference specifics, go to the CFDD's 2008 Advisor Conference home page located at:
<http://www.thecfdd.com/CFDDconference2008>.

The CFDD's Advisor Conference continues to grow and sell out early. **More accomplished retirement advisors attend our conference than any other industry event** and our ratio of advisors to registrants is unmatched.

The two and one-half day event was designed by the CFDD's network to help advisors learn, adapt, grow, manage and transition their practice. The bottom up agenda consists of more than sixty different sessions. Over 100 industry experts will participate, including fifty accomplished advisors. The agenda is fresh, populated by a "Who's Who In The Industry" and forecasts the direction of the retirement plans market.

In addition to a content rich agenda, CE credits, major prizes and a FUN networking forum, the conference is teamed with our annual Charity Golf Event and specialized pre-conference training for Wholesalers, TPAs and RIAs.

Exhibitor space is limited. We cannot maintain a quality networking environment and accommodate all the vendors that would like to exhibit. To secure booth space and experience the premier networking forum of the year, **exhibitors should register early**.

WHAT'S NEW FOR 2008

<p>The pre-conference activities change direction in 2008 and focus on high level training for an expanded audience of Wholesalers, TPAs and RIAs.</p>

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The entertainment at the 2008 Advisor Conference begins with the Kick-Off/Charity Golf Awards Party on Sunday evening, which will feature a Harley-Davidson biker theme. In addition to the golf awards, the conference will be teamed with other valuable awards, raffle prizes and a Harley-Davidson motorcycle grand prize drawing.

Authentic his and hers leather motorclothes will be awarded to the best biker attired individuals at the Kick-Off Party. The grand prize will be a collectible 105th Anniversary Edition Harley-Davidson FXDL Dyna® Low Rider® motorcycle (est. value \$20,000). **The raffle prizes and the grand prize will be awarded at the conclusion of the conference to attendees who are present at the drawing.**

To accommodate more individual registrants and optimize our venue, **the number of exhibitor booths will be reduced** in 2008. A contractor services representative will also remain on site during the entire conference to provide a high level of service and facilitate setup,

To maximize exhibitor exposure, **the cocktail parties will be held in the exhibitor area**, beverage stations will be increased & strategically located, the **networking break times will be extended** and the **keynote sessions will be scheduled daily**. The CFDD's two part Market Overview will also become a keynote and cornerstone of the conference.

Sponsorships will be more unique and repackaged. Beverage, coffee & cocktail stations will be located near the sponsor's booth (at CFDD discretion) and conference photos will be archived on the conference home page after the conference.

Breakout sessions will be coded (general, introductory, intermediate & advanced) and the applicable CE credits will be noted on the agenda. A complimentary CD-ROM of the entire conference will also be provided to all attendees.

The CFDD's new website will go live in early 2008. Designed to be the richest web-based resource available to retirement advisors, **the site will also offer unique advertising and marketing opportunities for vendors.** As a value add, all conference registrants will be issued logon information without additional cost.

CONFERENCE DATES, LOCATIONS & FACILITIES

The CFDD's October 13-15, 2008 Advisor Conference will be held at the Fairmont Scottsdale Princess Resort in Scottsdale, Arizona. The two and one-half day event will be hosted over a Monday – Wednesday period and the pre-conference activities will start at noon on Sunday, 10/12/08. This allows registrants to participate in Sunday's wraparound events without additional time away from the office.

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This is our second year at the Fairmont Scottsdale Princess Resort and some of the benefits associated with our hotel selection are listed below:

- \$259 Room Rate For Double Occupancy (Significant discount)
- No Additional Cost For Children
- Discounted Rate Available 3 Days Prior & 3 Days After Conference Dates
- Roundtrip Portage Fee Waived
- High Speed Internet Fee Waived (Requires no cost President's Club membership)
- Free Parking
- 650 Rooms, Including 200 Suites
- Space For 78 Exhibition Booths
- Premier Meeting Facilities

In addition to competitive resort rates, a central location, great weather and an accommodative staff, attendees will also be able to enjoy the following highlights:

- AAA Five-Diamond Resort
- Beautiful Spanish Colonial Open Architecture & Grounds
- Highly Rated Spa
- Ideal Setting Between McDowell Mountains & Sonoran Desert
- Two 18-hole Championship Golf Courses
- Tennis Courts & Horseback Riding (Off Property Activity)
- Award Winning Restaurants
- Reception Facilities
- Five Swimming Pools
- Major Local Attractions (Grand Canyon, Sedona, etc)

As you can see, we have negotiated a very competitive package. Arizona is also a great place to visit in early October. The new indoor/outdoor Princess Plaza bar, formerly the Cazadores, will open in early 2008 along with the hotel's new steakhouse, Bourbon Steak. Both facilities are expected to be world class.

EXHIBITION PACKAGE

Unlike other conference hosts, the CFDD offers only "one" exhibition package. We do not offer complicated packages or combine sponsorships with exhibition booths. Sponsorships are available on a stand alone basis and booths are offered on a first come, first served basis.

Like most conference hosts, the CFDD reserves the right to determine exhibitor eligibility. Exhibition booths are priced at \$8,750 and the package includes the following:

Exhibitor Information

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- 8' x 10' Exhibition Booth
- 8' Wall Drape
- 3' Side Rail Drape
- 2 Line Booth I.D. Sign With Name & Booth Number
- 6' Long, 24" Wide, 30" High Table Draped In Show Colors
- 2 Side Chairs
- 1 Wastebasket
- 1 Binder Of Conference Material Per Attendee
- Listing In The Conference Handout Material
- Link On The CFDD's "Provider Links" Page
- Free Wraparound Activity Banner Ad
- Excel Spreadsheet Of Conference Registrants
- **Seven (7) Conference Registrations**
- Additional Tickets Discounted To \$500
- **Pre-Conference Training For Wholesalers**
- Access To The CFDD's New Website
- **Unique/Discounted Sponsorships**
- Post Conference Guide Advertising Discount

As you can see, the CFDD's exhibition package offers real value. Since seven (7) conference registrations are included in the package, **the booth is virtually free and the wholesaler training is an additional bonus.**

All attendees, including booth personnel, must be registered. The registrations may be used by exhibitor personnel or given to advisors, but they may "not" be given to other vendors without the CFDD's permission.

Full contact information for each registrant, including name, company, address, phone, fax and email address, must be provided to the CFDD by 9/28/08. Registrations should be processed by a single source within the exhibitor's firm. After the information is received, the CFDD will contact each registrant by email and confirm their registration. Individual specific logon information to secure areas of the CFDD's website will also be issued to each registrant.

Advisors that paid for a ticket and then receive a complimentary ticket from an exhibitor will receive a refund, but only if the CFDD is notified by 9/28/08. Refunds will "not" be honored after the cutoff date, but substitutions will be accommodated.

As a value add, **exhibitors may purchase additional tickets for \$500, a 50% discount.** The tickets have real value and should be viewed as a reward or door opener for intermediaries and business partners. The amount due for additional tickets will be billed after the conference is concluded and attendance has been verified.

The CFDD's exhibition booths sell out quickly. It is, therefore, recommended that vendors who plan on exhibiting return the attached registration form as soon as possible along with payment. Booths cannot be assigned before payment. Upon receipt, exhibitors may select their booth from available inventory.

Drayage, shipping costs and booth connections are not included in the exhibitor fee. Additionally, the CFDD is not responsible for providing electric, phone, modem or high speed internet connections at the booth. If required, the appropriate form in the Exhibitor Kit must be completed. The Exhibitor Kit and other conference information may be downloaded from the conference home page. For more information, exhibitors may also contact:

American Audio Visual
The Fairmont Scottsdale Princess
7575 E. Princess Dr
Scottsdale, AZ 85255
(480) 473-3451
(480) 473-3469 fax
princess@americanavc.com

DEVELOPING A STRATEGY & LEVERAGING THE CONFERENCE

The industry is currently burdened with too many conferences. The consolidating elite are also overburdened with work related demands, continuing education requirements and staffing. Few agendas are fresh, most are behind the market and some are conflicted. Conference hosts generally lack a strategy for driving traffic through the exhibition area and few provide a meaningful attendance list in advance of the event.

Before committing to any conference, exhibitors should perform a cost-to-benefit analysis. Mature markets demand that resources be used more effectively. Conferences can be very productive, but they require an investment of time and money.

In addition to avoiding conferences that are unproductive, disorganized and do not provide a populated attendance list in advance, **prudent exhibitors should consider investing their advertising dollars in conferences that are heavily attended by their customers.**

Although CE credits are important, **content, client attendance and contact information are the primary conference criteria for providers to evaluate.**

Developing a conference strategy in advance and leveraging the conference's success can be very effective, but most providers don't really think about exhibiting. At a minimum, exhibitors should select a choice booth location and **leverage their alliance partners.** This provides exhibitors with greater exposure and a superior opportunity to facilitate advisor introductions. **Sharing the cost of well selected sponsorships with alliance partners is also smart marketing.**

To further enhance presence, exhibitors should request a role in the agenda. Exhibiting does not guarantee a spot on the agenda, but **the CFDD gives primary consideration to exhibitors before going outside to populate the breakout sessions.**

It would also be advantageous to utilize the free banner ads on the conference home page, consider sponsorships and host a wraparound event. Unlike other hosts, the CFDD encourages networking, hospitality suites, receptions and wraparound activities, but they may not be held during conference hours.

Participating in the CFDD's organized raffle (see Raffle) and promoting their overall conference role with an integrated and multi-media campaign would also pay dividends. The campaign should be consistent and include websites, newsletters, email blasts, direct mail, word of mouth, press releases, web casts and print advertising.

CONFERENCE SPONSORSHIPS

As noted, the CFDD does not offer the typical Platinum, Gold and Silver type packages with bundled sponsorships. Sponsorships are billed separately and are not part of the exhibition package.

As the premier event for retirement advisors, the CFDD's Advisor Conference is an excellent venue for sponsorship investing. The CFDD's sponsorships are priced more competitively than our competitors and **marketing to over 1,000 retirement specialists in one location is both smart & cost effective.** Carefully chosen sponsorships that are executed effectively could generate a significant ROI within a short payback time.

In addition to participating in the agenda and wraparound activities, **exhibitors should consider sponsorships to maximize their exposure.** Vendors on the exhibitor wait list would be particularly wise to take advantage of sponsorship opportunities.

The 2008 Advisor Conference sponsorships have been categorized and teamed with the following:

- Charity Golf Event
- Pre-Conference Educational Training
- Kick-Off/Golf Awards Party
- Conference
- Grand Prize Drawing
- Post Conference Guide

The sponsorships will be integrated and promoted in the conference marketing material from day one. The major sponsorships will also benefit from a national marketing campaign that will generate positive press for the industry, the sponsors and the conference. The Charity Golf Event sponsors will also be recognized at the Kick-Off Party.

Going forward, the CFDD will offer **unique sponsorships with major visibility, integrated advisor interface, media coverage and photo-ops**. Recognizing that the retirement industry is a challenging place to conduct business, the CFDD will create a more **relaxed/FUN atmosphere for networking** by enhancing the entertainment component of the sponsorships.

Details on the Charity Golf Event and the various sponsorships are available on the conference home page, but we are noting a few of the key sponsorships below.

Kick-Off/Charity Golf Awards Party Sponsorship (May Be Shared By Alliance Partners)

The most prominent sponsorship will be the CFDD's 2008 Advisor Conference Kick-off/Charity Golf Awards Party, which will feature a Harley-Davidson biker theme. In addition to other recognition, visibility, publicity and a major role in the agenda, the sponsorship includes food, cocktails (customized napkins & glasses) themed music, authentic Harley-Davidson leather motorclothes prizes, customized photo frames and a dedicated photographer for staged & impromptu photo-ops.

Biker-themed party attire will be encouraged and attendees sporting the best biker attire at Sunday's 7:00 - 9:30 pm kick-off party will have chances to win valuable prizes, including authentic Harley-Davidson leather jackets, vests and skull caps. (All pre-registered individuals in attendance on 10/12/08 are eligible for the motorclothes prizes.

The kick-off party sponsor will be introduced by Phil Chiricotti, President CFDD, and the motorclothes prize winners will be selected and announced on stage by the sponsor. The drawings will be teamed with photo-ops and included in the InvestmentNews "*Post Conference Guide*" and on the CFDD's website for attendees to browse and download. The guide has a circulation of over 100,000 readers. The kick-off party sponsor will also participate in the golf awards.

The Kick-Off/Charity Golf Awards Party is an excellent choice for alliance partners who wish to share a sponsorship.

Grand Prize Motorcycle Sponsorship

The grand prize motorcycle sponsorship includes a collectible 105th Anniversary Edition Harley-Davidson FXDL Dyna® Low Rider® (est. value \$20,000) The motorcycle will be given away as the grand prize on 10/15/08, the last day of the conference. In addition to the high visibility at the kick-off party, the Harley will also be on prominent display throughout the conference with a photographer

available at posted times for photo-ops. The motorcycle backdrop, saddle bags, license plate holder, motorclothes, photo keepsake holders and party signage will all be customized with the sponsor's name, logo or both. (Grand prize eligibility is limited to pre-registered intermediaries, i.e., advisors, brokers, RIAs & fee-based consultants, and individuals that paid standard pricing for their registration).

Pre-Conference Training Program Sponsorships

To set the stage for the conference and create a stimulating environment, the event will commence with high quality pre-conference training for Wholesalers (see Wholesaler Training), TPAs & RIAs. The TPA & RIA training will be packaged with training sponsorships that include "exclusive" networking opportunities with TPAs & RIAs. Vendor attendance at the pre-conference training for TPAs & RIAs will be strictly limited to personnel on the agenda and educational sponsors.

As noted previously, **the CFDD is assuming a lead role in helping non-specialized RIAs develop retirement plans business and partner with service providers.**

For detailed information on all the various sponsorships, go to the conference home page and click on "*Conference Sponsorships.*" The conference home page is located at: <http://www.thecfdd.com/CFDDconference2008>.

CHARITY GOLF EVENT SPONSORSHIPS

In conjunction with John Hancock, the CFDD's 2007 inaugural Charity Golf Event raised over \$40,000 for the Injured Marine Semper Fi Fund and the event's goodwill continues in 2008. Be part of this worthy cause by marking your calendar for a 12:00 pm tee time on Sunday, October 12, 2008.

The Injured Marine Semper Fi Fund provides financial assistance to injured Marines, sailors, members of other service branches injured while assigned to Marine forces and their families. Their goal is to help defray expenses incurred during recovery and rehabilitation.

For more details on registering, sponsorships, donations and matching contributions for the "*John Hancock Charity Golf Outing,*" go to the Charity Golf Event home page at: <http://www.hancockgolfatcfdd.com>. The 2007 thank you letter from the Injured Marine Semper Fi Fund may also be viewed at Charity Golf Event home page.

Sponsors with specific questions should contact Gene Huxhold directly (John Hancock Retirement Plan Services) by phone at (630) 705-4415 or by email at Gene.Huxhold@jhancock.com. Additional information on the Injured Marine Semper Fi Fund may be found at: <http://semperfifund.org/>

RAFFLE

To preclude early departure and increase booth traffic, the CFDD will organize, manage and promote a conference raffle. Participation is voluntary and there is no cost beyond a prize donation valued at \$250-\$500.

The raffle promotion will be integrated into the CFDD marketing material and included in the conference program materials. An online listing of sponsors and prizes will also be posted on the conference home page. Photos of the sponsors and prize winners will be uploaded to the conference home page after the conference.

The raffle winners will be selected and announced onstage prior to the grand prize motorcycle drawing at the conclusion of the conference. Raffle prizes are limited to one per person and winners must be in attendance for the drawing on Wednesday, October 15, 2008. Raffle prize winners are eligible for the grand prize motorcycle drawing.

Only pre-registered intermediaries and individuals that paid standard pricing for their conference registration qualify for raffle prizes and the grand prize motorcycle. Eligibility requires a passport stamped by all exhibitors. The passport must be turned in to the passport box in the general session drawing room at the conclusion of the conference (stamp & passport provided by CFDD).

To facilitate the storage, drawing and shipping of raffle prizes, sponsors are encouraged to donate small prizes and gift certificates valued at \$250-500. Sponsors may also ship prizes directly to the winner.

CONFERENCE ATTENDANCE LIST

The CFDD is distinguished by posting a sortable Excel spreadsheet of conference registrants to a secure area of the conference home page. The dynamic list is further distinguished by including full contact information, i.e., name, company, address, phone and fax. To the best of our knowledge, **no other conference host provides this detailed information in a convenient format.**

To preclude the marketing feast and protect the privacy of registrants, the attendance list is uploaded to the conference home page about six weeks in advance of the conference. The list is also removed at the conclusion of the conference. To facilitate marketing efforts, exhibitors should monitor the list as many individuals register late.

Exhibitors that manage their conference experience effectively promote their overall conference role. Sharing the conference attendance list with non-registrants is, however, strictly prohibited. Additionally, the list may not be copied for mailing list purposes or telemarketing beyond conference activity.

The attendance list is for the exclusive benefit of registrants and it has been seeded and encrypted for security purposes. Any firm or individual sharing the list with non-registrants will be subject to full legal remedy without exception.

PRE-CONFERENCE TRAINING FOR WHOLESALERS

Plan formations have peaked, the sales process has lengthened and while benchmarking has increased, turnover has declined. To offset the rising cost of acquiring new business, providers have committed more resources to the sales process, but productivity has declined.

Hiring the right people, avoiding turnover and meeting the needs of individual sales people are ongoing challenges, but productivity can always be increased. New sources of growth are also available.

To help providers **increase sales productivity, identify new sources of growth and emerging trends as well as communicate advisor needs**, the CFDD will host pre-conference training for wholesalers on Sunday, 10/12/08. The training will start around noon and **provide real world knowledge that can be applied quickly & have measurable impact on sales**.

Industry experts participating in the wholesaler training include: Fred Reish, Managing Director, Reish Luftman Reicher & Cohen (*Plan Design & Emerging Trends*), Ann Schleck, Principal, Ann Schleck & Co (*Closing Larger Retirement Plans Business*), John Faustino, VP, Desktop Software, Morningstar, Inc. (*The Application Of Research & Reporting Tools In Plan Acquisition/Monitoring*), Ami Tully Lotka, President, Maximum Impact Partners (*Managing Territory Efficiently*) and Ray Henderson, Director, Business Health PTY., Ltd (*Building Business-To-Business Relationships*).

Successful wholesalers and advisors with decades of experience will also be instrumental in the training, including wholesalers who were formerly advisors and advisors who were formerly wholesalers.

As a value add, **exhibitors may send one wholesaler to the Wholesaler Training program without cost**. Additional personnel will incur a \$1,000 fee. The wholesaler training is exclusive to wholesalers and those on the agenda, but it is not limited to exhibitor personnel. To encourage candor, management is prohibited from attending the sessions.

To obtain more information and register for the Wholesaler Training, go to the conference home page and click on “*Pre-Conference Training Information & Registration.*” The conference home page is located at: <http://www.thecfdd.com/CFDDconference2008>

CONFERENCE/EXHIBITION HOURS

As mentioned, the CFDD’s 10/13 – 10/15/08 Advisor Conference will host major pre-conference events on Sunday, 10/12/08. Consequently, **registrants should consider the scheduling of these events when making their hotel and travel arrangements**.

Pre-conference events for Sunday, 10/12/08, include the annual **Charity Golf Event**, a unique **pre-conference training program** and a major conference **Kick-Off/Charity Golf Awards Party**.

The John Hancock hosted Charity Golf Event starts at noon on Sunday and the golf awards & recognition will be teamed with the 7:00 p.m. – 9:30 p.m. Kick-Off Party. Again, all golf event participants and conference registrants are welcome and encouraged to attend the exciting Kick-Off Party.

Pre-conference events for Sunday also include the 12:30 p.m. – 7:00 p.m. training program for Wholesalers, TPAs & RIAs. The training will provide real world knowledge that can be applied quickly and have measurable impact on sales. As noted, **pre-conference Training Program Sponsorships are available and they offer unique networking opportunities.**

Exhibition hours are 7:00 a.m. – 6:30 p.m. on Monday and Tuesday and 7:00 a.m. – 12:00 a.m. on Wednesday. Exhibitor setup is scheduled from 4:00 p.m. – 8:00 p.m. on Sunday, 10/12/08, and teardown is scheduled from 11:00 a.m. – 3:00 p.m. on Wednesday, 10/15/08.

Official conference registration starts at 7:00 a.m. on Monday morning, 10/13/08, and will remain open throughout the conference. As a courtesy and to avoid congestion, **registration will be available on Sunday afternoon.**

The daily breakout sessions start around 8:00 a.m. and conclude at 5:15 p.m. on Monday and Tuesday. The two and one-half day event will conclude at noon on Wednesday, 10/15/08.

Complimentary open bar cocktail parties will be hosted from 5:15 p.m. – 6:30 p.m. in the exhibition area on Monday and Tuesday. Complimentary breakfasts will be served on Monday, Tuesday and Wednesday from 7:00 a.m. – 8:00 a.m. while complimentary lunches will be served on Monday and Tuesday from 12:15 p.m. – 1:15 p.m.

HOTEL ACCOMMODATIONS/RESERVATIONS

Rated five-diamond by AAA, the Fairmont Scottsdale Princess Resort is among the nation's premier meeting facilities and best ranked spas.

Set scenically against the McDowell Mountains, the resort pays tribute to Arizona's heritage with Spanish Colonial architecture, expansive plazas embellished with fountains and lush flower/cactus gardens. Like a movie setting, the sun-washed stone and green cottonwoods also rise up to meet the blue sky and purple mountains.

In addition to the central location, great weather, an ideal setting, a luxury resort, a top ranked spa, a terrific staff, premier meeting facilities, ideal reception facilities and discounted rates, registrants may enjoy two 18-hole championship golf courses, tennis, four award winning restaurants, five swimming pools and unmatched local attractions, i.e., Grand Canyon, Sedona, etc.

While luxury resort hotels tend to be expensive, the **CFDD has negotiated a very aggressive group rate of \$259 per night.** Based on availability, the discounted rate is available 3 days before and after the conference dates, making the resort an ideal choice for a family vacation. Registrants should also note that there is no additional cost for double occupancy or children under 18, parking is free and the portage & high speed internet connection fees have been waived.

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We have reserved all the hotel's standard rooms for the conference period, but **hotel space is LIMITED**. October is a busy time of year for Arizona hotels and it's important to **make your hotel reservations as soon as possible**. Rates could increase significantly after our 9/12/08 cutoff date. Reservations after the cutoff date, or exceeding the contracted room block, will be confirmed on a space and rate available basis only.

Reservations can be made by phone or online. **To register by phone, contact the Fairmont Scottsdale Princess Resort directly** by calling (480) 585-4848 or (800) 344-4758.

Online reservations can be made by linking to the Fairmont's group booking URL at <http://www.fairmont.com/scottsdale> and entering the promotional code **GRDUD1**. The promotional code is for online booking only, but **you must enter the code for availability and the group rate**.

If you reserve your room by phone, **YOU MUST MENTION THAT YOU ARE ATTENDING THE CENTER FOR DUE DILIGENCE CONFERENCE**. Because the CFDD has all the hotel's standard rooms under contract for the conference period, you will be told the hotel is sold out if you do not mention the Center for Due Diligence. The conference hotel is expected to sell out early, so book your room as soon as possible.

The conference is scheduled from October 13-15, 2008 over a Monday-Wednesday period, but the Charity Golf Event and the pre-conference training start at noon on Sunday, 10/12/08. Exhibitor setup starts at 4:00 p.m. on Sunday and the conference Kick-Off/Charity Golf Awards Party will also be hosted on Sunday from 7:00 p.m. – 9:30 p.m.

If you plan on arriving early to attend any of the pre-conference events, spend a few days with the family or take advantage of local attractions, be sure to **book your hotel and travel arrangements accordingly**.

If the Fairmont is sold out when you call and you want to stay in the conference hotel, **place your name on their wait list** and book your room at our preferred overflow hotel, the Resort Suites. The Resort Suites is located directly across the street from the Fairmont and a pedestrian crossing joins the two properties. Transportation is not required. The Resort Suites can be reached by phone at (888) 222-1059. Online reservations can also be made at: <http://www.resortsuites.com/forms/subscribe.htm>

SUMMARY OF EXHIBITOR BENEFITS

- Premier Conference For Retirement Advisors

• Unmatched Advisor Attendance Both In Quality & Quantity

• Dynamically Updated Excel Spreadsheet Of Registrants Posted On Conference Home Page One Month In Advance Of Event

- Premier Resort, Spa & Meeting Facilities
- Opportunity To Network With The Elite In An Ideal & Controlled Environment

• Exhibitor Fee Includes Seven (7) Conference Registrations With Full Access To All Events (Booth is virtually free)

- Additional Registrations Available At A 50% Discount

• Free Banner Ad On Conference Home Page

- URL Posting On CFDD's "Provider Links" Page
- Exhibitor Listing In Conference Handout Material & Online

• Opportunity To Participate In The Industry's Most Content Rich Agenda

- Complimentary Breakfast, Lunch & Cocktail Parties

• Non-Competing Wraparound Activities Encouraged

- No Audio, Video Or Photo Restrictions

• Access To Full Day Of Pre-Conference Wholesaler Training

- Unique & Competitively Priced Sponsorships
- Post-Conference Guide Advertising Discount

PRE-CONFERENCE WRAPAROUND ACTIVITIES

SUNDAY, 10/12/08

Charity Golf Event

11:00 a.m. Registration
Kierland Golf Club
15636 North Clubgate Drive
Scottsdale, AZ 85254
(480) 922-9283

Conference Registration Desk Opens

12:30 p.m. – 9:30 p.m.
Ballroom Porte Cochere

Pre-Conference Training Program

12:30 p.m. – 7:00 p.m.
Conference Center

Exhibitor Setup

4:00 p.m.
Conference Center

Kick-Off/Charity Golf Event Awards Party

7:00 p.m. – 9:30 p.m.
Princess Plaza Courtyard

CONFERENCE DATES

2 ½ Days
Monday - Wednesday
October 13 - October 15, 2008

CONFERENCE LOCATION/HOTEL

The Fairmont Scottsdale Princess Resort
7575 East Princess Drive
Scottsdale, AZ 85255
(800) 344-4758
(480) 585-4848
(480) 585-0091 fax
Email: Scottsdale@fairmont.com
<http://www.fairmont.com/scottsdale/>

SET-UP

Sunday, October 12, 2008
Begins at 4:00 p.m.

Unless late set-up has been approved by the CFDD, all exhibits must be assembled and staffed by 7:00 a.m. on Monday, October 13, 2008.

CONFERENCE EVENTS/ HOURS

Sunday, October 12, 2008

12:30 p.m. – 9:30 p.m. Registration Desk Opens Early
7:00 p.m. – 9:30 p.m. Kick-Off/Charity Golf Event Awards Party

Monday, October 13, 2008

7:00 - 8:00 a.m. **Registration & Breakfast** (*Registration remains open throughout the conference*)
8:00 - 8:15 a.m. CFDD Introductory Comments
8:15 - 9:15 a.m. Keynote
9:15 - 10:00 a.m. Networking In Exhibitor Area/Break (45 minutes)
10:00 - 11:00 a.m. Breakout Sessions (4)
11:00 - 11:15 a.m. Networking In Exhibitor Area/Break (15 minutes)
11:15 - 12:15 p.m. Breakout Sessions (4)
12:15 - 1:15 p.m. **Lunch**
1:15 - 2:15 p.m. Breakout Sessions (4)
2:15 - 2:30 p.m. Networking In Exhibitor Area/Break (15 minutes)
2:30 - 3:30 p.m. Breakout Sessions (4)
3:30 - 4:15 p.m. Networking In Exhibitor Area/Break (45 minutes)
4:15 - 5:15 p.m. Breakout Sessions (4)
5:15 - 6:30 p.m. **Cocktail Party**

Tuesday, October 14, 2008

- 7:00 - 8:00 a.m. **Registration & Breakfast** (*Registration remains open throughout the conference*)
- 8:00 - 8:15 a.m. CFDD Introductory Comments
- 8:15 - 9:15 a.m. Keynote
- 9:15 - 10:00 a.m. Networking In Exhibitor Area/Break (45 minutes)
- 10:00 - 11:00 a.m. Breakout Sessions (4)
- 11:00 - 11:15 a.m. Networking In Exhibitor Area/Break (15 minutes)
- 11:15 - 12:15 p.m. Breakout Sessions (4)
- 12:15 - 1:15 p.m. **Lunch**
- 1:15 - 2:15 p.m. Breakout Sessions (4)
- 2:15 - 2:30 p.m. Networking In Exhibitor Area/Break (15 minutes)
- 2:30 - 3:30 p.m. Breakout Sessions (4)
- 3:30 - 4:15 p.m. Networking In Exhibitor Area/Break (45 minutes)
- 4:15 - 5:15 p.m. Breakout Sessions (4)
- 5:15 - 6:30 p.m. **Cocktail Party**

Wednesday, October 15, 2008

- 7:00 - 8:00 a.m. **Breakfast**
- 8:00 - 9:00 a.m. CFDD Keynote: Provider Focus
- 9:00 - 9:15 a.m. Networking In Exhibitor Area/Break (15 minutes)
- 9:30 - 10:30 a.m. CFDD Keynote: Advisor Focus
- 10:30 - 12:00 p.m. **Raffle & Grand Prize Motorcycle Drawings**

BOOTH EXHIBITION HOURS

Monday, October 13, 2008

7:00 a.m. - 6:30 p.m.

Tuesday, October 14, 2008

7:00 a.m. - 6:30 p.m.

Wednesday, October 15, 2008

7:00 a.m. - 12:00 p.m.

TEAR DOWN

Wednesday, October 15, 2008

11:00 a.m. - 3:00 p.m.

*CFDD reserves the right to amend the schedule as necessary. **Exhibitors may “NOT” tear down prior to 11:00 a.m. on Wednesday, 10/15/08, without the CFDD’s permission.** If permission is granted, exhibitors must make arrangements with Brede Exposition Services for proper storage, handling and shipping instructions. The CFDD is not responsible for storage, handling and shipping of exhibitor materials.*

PAYMENT

All exhibition fees must be paid in advance of booth assignment. Sponsorships and registrations in addition to the seven (7) included in the exhibition fee will be billed separately.

CANCELLATION

CFDD will not refund exhibitor fees or sponsorship fees in the case of cancellation. The CFDD also reserves the right to resell unused booth space and sponsorships upon cancellation.

SHARING & SUBLETTING

CFDD approval is required for companies interested in sharing exhibition booth space, which may incur additional cost. Non-exhibiting personnel are not permitted to work in the assigned space during the conference.

Exhibitors may not assign or sublet the whole or any portion of said rented space under any circumstances.

BADGES

The names and full contact information for all registrants, including booth personnel, must be provided to the CFDD no later than 9/28/08. **Badges will be provided for all registrants and must be worn at all times.**

ARRANGEMENT OF BOOTH SPACE

All displays must conform to CFDD standards and must not be bigger than 8'x10' without prior permission. Exhibitors may not engage in activities that interfere with other exhibitors or impede traffic flow. **The distribution of exhibitor material is limited to the exhibitor's assigned space.**

AFFILIATED EVENTS

The CFDD encourages wraparound activity, including hospitality suites, but **exhibitors may not host or conduct any event during conference hours** that would take attendance away from the official event.

PHOTOGRAPHY, LIGHTING, SOUND, VIDEO & AUDIO TAPING

To add further value, the CFDD allows exhibitors participating in the conference agenda to capture their own presentation. Other video taping, audio taping and photo taking may be allowed, but requires CFDD permission in advance.

Exhibitors on the agenda that wish to capture their individual presentation must make their own arrangements. The CFDD will not provide these services.

PROTECTION OF EXHIBIT FACILITY

Exhibitors may not post, tack, nail, screw or otherwise attach anything to columns, walls, floors or other parts of the exhibit area without permission from the CFDD and The Fairmont Scottsdale Princess Resort.

LIABILITY

Exhibitors agree to make no claim of any kind against the CFDD for any loss, damage, theft or destruction of goods or for any injury that may occur to their employees while attending the 2008 Advisor Conference. Exhibitors will also be responsible to their own agents, employees and third parties for all claims, liabilities, actions, costs, damages and expenses arising or relating to the custody, possession, operation, maintenance and control of exhibitor space. Exhibitors assume responsibility and agree to indemnify the CFDD against any claims or expenses arising from the use of the exhibition space.

CONFERENCE INTERRUPTION

If for any reason, the 2008 Advisor Conference is cancelled, postponed or the location and dates are changed, refunds will not be given to exhibitors. In lieu of refunds, the CFDD will assign exhibitors comparable space at the rescheduled event.

RIGHT TO EJECT

Sponsors/Exhibitors attending and participating must comply with the CFDD's rules, regulations and other requirements. If a breach occurs, the CFDD reserves the right to eject the Sponsor/Exhibitor without a refund.

ERRORS & OMISSIONS

The CFDD will not be liable for any Errors or Omissions in the conference documents, website or promotional materials. The CFDD makes no representation or warranties regarding the number of attendees or the nature of attendees.

EXHIBITOR HALL CONTRACTOR

In addition to this document, exhibitors may download an *Exhibitor Kit* from the conference home page. The *Exhibitor Kit* is from Brede Exposition Services and includes contact information, a menu of "optional" items and shipping instructions. Contact Helen Freedman (Brede Exposition Services) at (602) 275-5900 for other miscellaneous needs.

ATTIRE

The Fairmont Princess is a resort and casual dress is strongly recommended.

SHIPPING

All conference materials should be shipped to Brede Exposition Services and addressed as follows:

Brede Exposition Services
C/O Yellow Freight Services
2425 South 43rd Ave
Phoenix, AZ 85009 - 6012

Additionally, please include the following on your shipment:

- Exhibitor Company Name
- Booth Number
- CFDD Advisor Conference/Fairmont Princess

For additional shipping information, please refer to the *Exhibitor Kit* provided by Brede Exposition Services

PACKAGES, STORAGE & MATERIALS HANDLING

It is strongly suggested that all advance materials be sent to Brede Exposition Services. The Fairmont Scottsdale Princess will not accept freight or Exhibitor Booth materials. The Fairmont's space for storage and materials handling is very limited. If you choose to ship to the Fairmont, it is your responsibility to retrieve and or track your packages. The Fairmont Scottsdale Princess will bill you for receiving packages as well as shipping packages out. Brede will also bill for the same. To avoid double billing, please ship directly to Brede. For more information on shipping to the Fairmont Scottsdale Princess, please contact the hotel's Shipping and Receiving Department at (480) 585-4848, Extension 7809 two weeks prior to the incoming dates.

CONTACT INFORMATION:

CFDD

P.O. Box 8
Western Springs, IL 60558
630 662-0284
630 662-0286 fax
CFDD@TheCFDD.com (email)
<http://www.TheCFDD.com/CFDDconference2008>

The Fairmont Scottsdale Princess Resort

7575 East Princess Drive
Scottsdale, AZ 85255
(800) 344-4758
(480) 585-4848
(480) 585-0091 fax
Email: Scottsdale@fairmont.com
<http://www.fairmont.com/scottsdale/>

Brede Exposition Services

Helen Freedman
2501 E. Magnolia St
Phoenix, AZ
602 275-5900
602 275-5959 fax
hfreedman@brede.com

Audio Visual

American Audio Visual
The Fairmont Scottsdale Princess
7575 E. Princess Dr
Scottsdale, AZ 85255
(480) 473-3451
(480) 473-3469 fax
princess@americanavc.com

CENTER FOR DUE DILIGENCE
P.O. Box 8 • Western Springs, Illinois 60558
(630) 662-0284 • Fax (630) 662-0286

E-mail: CFDD@TheCFDD.com

Web: <http://www.TheCFDD.com>

2008 ADVISOR CONFERENCE EXHIBITOR FORM

***“AN INDUSTRY IN TRANSITION:
Old Model Is Mature, New One Is An Infant”***

October 13-15, 2008 (Monday-Wednesday)
The Fairmont Scottsdale Princess
Scottsdale, Arizona

Please print or type all information below.

Name: _____
(Primary Contact)

Company Name: _____
(Exactly as it should be displayed on your booth)

Address: _____

City: _____ **State:** _____ **Zip Code:** _____

Phone: _____ **Fax:** _____

Email Address: _____

Web Site for Advisors: _____

One Paragraph Description Of Your Company: _____

CENTER FOR DUE DILIGENCE
P.O. Box 8 • Western Springs, Illinois 60558
(630) 662-0284 • Fax (630) 662-0286

E-mail: CFDD@TheCFDD.com

Web: <http://www.TheCFDD.com>

In addition to **more retirement advisor attendance than any other conference**, the CFDD limits exhibitors to maintain an “advisor-centric” atmosphere and encourages non-competing wraparound activities. The conference offers ideal networking opportunities, a luxury resort setting and an opportunity to participate in the agenda. The \$8,750 exhibition fee includes:

- 8'x10' Booth (Booth, Wall/Side Drapes, I. D. Sign, Table, Chairs & Wastebasket)
- **7 Conference Registrations***
- Additional Registrations Discounted To \$500
- Exhibitor Listing In Conference Handout Material & Online
- Link On CFDD’s “Provider Links” Page
- Excel Spreadsheet Of Registrants
- Free Wraparound Activity Banner Ad
- Competitively Priced Sponsorships
- **Pre-Conference Wholesaler Training Program***
- Post-Conference Guide Advertising Discount

**Exhibitors may send one wholesaler to the pre-conference training on Sunday, 10/12/08, without cost. Additional attendees would incur a \$1,000 per-wholesaler fee. The training is limited to wholesalers, but it is not limited to exhibitor personnel. To obtain more information and register for the Wholesaler Training, go to the conference home page and click on “Pre-Conference Training Information & Registration.” The conference home page is located at: <http://www.thecfdd.com/CFDDconference2008>.*

The CFDD’s Advisor Conferences sell out early and **over 1,000 retirement specialists attend the annual event**. The CFDD targets retirement advisors exclusively and our registrants control **more retirement assets than any other intermediary group**.

The exhibition package offers **more value than any other industry event**. Since seven (7) tickets are included in the exhibition fee, the **booth is virtually free**. To register for this premier event, secure limited exhibition space, network with elite retirement advisors and expand your universe, complete this form and return it with a check for \$8,750 to the address below:

**Center For Due Diligence,
P. O. Box 8
Western Springs, IL 60558**

*Upon receipt of payment, exhibitors may select their booth from available inventory. Individual registrations may be substituted at anytime, but **all registrations must be assigned by 9/28/08**. The free wraparound activity banner ads are limited and available on a first-come, first-served basis. Exhibition and sponsorship fees are non-refundable.*

CENTER FOR DUE DILIGENCE
P.O. Box 8 • Western Springs, Illinois 60558
(630) 662-0284 • Fax (630) 662-0286

E-mail: CFDD@TheCFDD.com

Web: <http://www.TheCFDD.com>

2008 ADVISOR CONFERENCE
HOTEL RESERVATION INFORMATION
(Contact Fairmont Directly)

***“AN INDUSTRY IN TRANSITION:
Old Model Is Mature, New One Is An Infant”***

October 13-15, 2008 (Monday -Wednesday)
The Fairmont Scottsdale Princess
Scottsdale, Arizona

Hotel reservations now being taken at:

The Fairmont Scottsdale Princess
7575 East Princess Drive
Scottsdale, Arizona 85255
(800) 344-4758
(480) 585-4848

The CFDD has all the hotel's standard rooms under contract for the conference period at a discounted group rate of \$259. Reservations can be made by phone or online. Overflow hotels are also available.

Online reservations can be made by linking to the Fairmont's group booking URL at <http://www.fairmont.com/scottsdale> and entering the promotional code **GRDUD1**. The promotional code is for online booking only, but **you must enter the code for availability and the group rate.**

If you reserve your room by phone, **you must mention that you are attending the Center For Due Diligence conference.** If you do not mention the Center for Due Diligence, you will be told the hotel is sold out.

If the Fairmont is sold out when you call and you want to stay in the conference hotel, **place your name on their wait list** and book your room at our preferred overflow hotel, the Resort Suites. The Resort Suites is located directly across the street from the Fairmont and a pedestrian crossing joins the two properties. The Resort Suites can be reached by phone at (888) 222-1059. Online reservations can also be made at: <http://www.resortsuites.com/forms/subscribe.htm>

The hotel is expected to sell out early and rates could increase significantly after the 9/12/08 cutoff date. Reservations after the cutoff date, or exceeding the contracted room block, will be confirmed on a space and rate available basis only. Applicable state and local taxes, service and specific fees are not included in rate. Individuals are responsible for their own room, tax, incidental charges and other authorized charges. **Individuals/groups that fail to cancel room reservations 72 hours before date of arrival will be charged the room rate + tax for one night by the hotel.**

If you plan on attending any of the pre-conference events, be mindful of the times and dates. Book your hotel and travel arrangements accordingly.