

## CENTER FOR DUE DILIGENCE

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E-mail: CFDD@TheCFDD.com

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

Date: June 24, 2009

To: Exhibitors

Subject: **Exhibitor Information & Form:  
2009 Advisor Conference**

From: CFDD

The information in this document is designed to give vendors a summary of the exhibition package for the CFDD's October 5-7, 2009 Advisor Conference.

For information applicable to individual registration, the agenda, sponsorships and other conference specifics, go to the CFDD's 2009 Advisor Conference home page located at:  
<http://www.thecfdd.com/CFDDconference2009>.

Unlike other conference hosts, the CFDD offers sponsorships & exhibition booths individually, i.e., vendors may select sponsorships, an exhibition booth or both.

Like the 2007 and 2008 conferences, **the CFDD's October 5-7, 2009 Advisor Conference will be held at the Fairmont Scottsdale Resort.** The two and one-half day event will be hosted over a Monday-Wednesday period and the pre-conference social activities will take place on Sunday, 10/4/09.

The 2009 conference completes our three year contract with the Fairmont Scottsdale Resort. Although the location for the 2010 Advisor Conference has not yet been finalized, Chicago, Denver and San Antonio (Texas Wine Country) are being considered.

The CFDD's Advisor Conference remains distinguished by an unbiased approach, rich content, advisor attendance, value, unique sponsorships, unmatched networking, entertainment and hands-on conference management. **More accomplished retirement plan advisors attend the CFDD's Advisor Conference than any other industry event and our ratio of advisors to registrants is unequalled.**

In addition to pre-conference social activities, a major Kick-Off Party, a content rich agenda, a free conference CD-ROM, a relaxed networking forum, CE credits and complimentary breakfast/lunch/cocktail parties, **CFDD 09 offers all registrants eligibility for the grand prize, the attire awards and the raffle prizes.**

It is difficult to accommodate all the vendors that would like to exhibit and still maintain a quality networking environment. Since booth space is limited, it is **strongly recommended that exhibitors register early** to obtain a choice location and benefit from the premier networking event of the year.

## WHAT'S NEW FOR 2009?

In lieu of pre-conference training and the charity golf event, **the CFDD will encourage and promote vendor organized social activities to maximize networking on Sunday, 10/4/09.**

When planning their activities, vendors are encouraged to take advantage of the unique Arizona setting, i.e., mountain climbing, a Grand Canyon excursion, the spectacular red rocks of Sedona, rafting, jeep desert tours, hot air balloon rides, helicopter tours, a visit to the ghost town of Jerome, a trip on the Verde Canyon railroad, etc.

Select vendors have already scheduled pre-conference social activities, including a Camelback Mountain hike, a rafting trip and a networking cocktail party for women. The CFDD will help exhibitors market their social activities and to facilitate these events, **a list of all the social activities will be posted on the 2009 Advisor Conference homepage.**

Last year's biker theme and prizes were a huge success. To keep the event fresh, the 2009 conference will feature a different theme. To lighten the atmosphere and create a fun networking environment, **the 2009 Kick-Off Party will feature an entertaining Old/Wild West theme, including roping, riding, shootouts, music, dancing, food, cocktails and photo-ops.**

**All registrants, including exhibitor personnel, will be eligible for the CFDD's Western Attire Awards, the Grand Prize Luxury Dude Ranch Vacation - a dream getaway for two at one of the nation's top resorts - and assorted Raffle prizes.**

The valuable his & hers Western Attire Awards will be presented to the individuals donning the most authentic western getup during the Kick-Off Party on Sunday night. The grand prize and the raffle prizes will be awarded at the concluding event on Wednesday morning. The winners must be present to claim their prizes.

To accommodate more individual registrants and optimize our venue, **the number of exhibitor booths was reduced** in 2008. The 2009 floor plan will remain consistent with last year. Like last year, **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 strategically located, the **networking break times have been extended** and the **keynote sessions will be scheduled daily.**

The 2009 sponsorships have been repackaged. **In addition to major marketing exposure, the CFDD's unique sponsorships offer unmatched value and return on investment.**

All conference registrants will gain full access to the CFDD's content rich website. The CFDD's advisor base continues to expand and **discounts are available to exhibitors who wish to advertise on the website or in our e-mail newsletter.** The CFDD's website has experienced up to 500,000 page visits in a single month and our newsletter is disseminated to a targeted audience of over 30,000 in the financial services industry.

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### **CONFERENCE DATES, LOCATIONS & FACILITIES**

The CFDD's October 5-7, 2009 Advisor Conference will be held at the Fairmont Scottsdale Resort in Scottsdale, Arizona. The two and one-half day event will be hosted over a Monday – Wednesday period and the pre-conference social activities will take place on Sunday.

The primary benefits of our hotel selection are listed below:

- \$219 Room Rate For Double Occupancy (Significant discount)
- No Additional Cost For Children
- Discounted Rate Available 3 Days Prior/After Conference Dates (Based on availability)
- Roundtrip Portage Fee Waived
- High Speed Internet Fee Waived (Requires no cost President's Club membership)
- Free Self-Parking
- 650 Rooms, Including 200 Suites
- Space For 78 Exhibition Booths
- Premier Meeting Facilities

In addition to competitive resort rates, a central location, ideal weather and an accommodative staff, attendees also benefit from the following:

- 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)
- Ideal Weather (Early October)

As you can see, we have negotiated a very competitive package. **Arizona is a great place to visit in early October and an ideal location for a family vacation. Spouses may attend the conference social activities without cost and we hope to see both you & your family at this memorable event.**

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## 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 an individual 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:

- 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 Conference Handout Material
- Link On The CFDD's "Provider Links" Page
- Excel Spreadsheet Of Conference Registrants With Full Contact Information
- **Ten (10) Full Conference Registrations**
- Additional Registrations Discounted To \$500
- Full Access To The CFDD's Website
- Exhibitor Personnel Eligible For All Prizes & Awards
- **Unique & Competitively Priced Sponsorships With Major Exposure**
- **Discounted Website & E-Mail Newsletter Advertising**
- Post Conference Guide Advertising Discount
- **Opportunity To Participate In The Industry's Most Content Rich Agenda**
- **Wraparound/Social Activity Support & Promotion**

As you can see, the CFDD's exhibition package offers major value. Given that ten (10) conference registrations are included in the package, **the booth is virtually free.**

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 emailed to the CFDD no later than two weeks prior to the conference. **Non-exhibitor personnel registrations must be assigned by 9/4/09.**

In the event an advisor pays the registration fee and then receives a complimentary registration from an exhibitor, a refund will be given by the CFDD if notified by 9/4/09. Refunds will “not” be honored after the cutoff date.

Registrations should be processed by a single source within the exhibitor’s firm. Upon receipt of the spreadsheet with full contact information, the CFDD will confirm each registration by email. We will also issue individual specific logon information to secure areas of our website to each registrant.

As a value-add, **exhibitors may purchase additional registrations for \$500, a 50% discount.** The registrations have strong industry 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 has concluded and attendance has been verified.

Since exhibition booths sell out quickly, it is recommended that **vendors who plan on exhibiting return the attached registration form with payment as soon as possible.** 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](mailto:princess@americanavc.com)

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## DEVELOPING A STRATEGY & LEVERAGING THE CONFERENCE

Developing a conference strategy and leveraging an event's success can be a very effective means of marketing for exhibitors. Resources should, however, be used effectively. Conferences that are heavily attended by vendor clients and their targeted audience should obviously be prioritized.

While most providers don't really think about exhibiting, **sending the appropriate personnel, selecting a choice both location along with creative initiatives/props which generate booth traffic** are good places to start.

**Leveraging alliance partners** is important and provides exhibitors with greater exposure along with an opportunity to facilitate advisor introductions. Additionally, **sharing the cost of well selected sponsorships with alliance partners is smart marketing.**

**Exhibitors can maximize their exposure by requesting presence on the agenda.** Although a role in the agenda is not guaranteed, **the CFDD gives primary consideration to exhibitors when populating the agenda.**

**Discounted pre & post conference advertising, raffle participation** (see Raffle) **and promoting the exhibitor's overall conference role with an integrated & consistent multi-media approach would also pay dividends.** Potential campaign components could include websites, newsletters, email blasts, direct mail, word of mouth, press releases, web casts and print advertising.

Wraparound activities are quite effective for networking purposes. Unlike other hosts, **the CFDD encourages and supports wraparound activities. Social events, hospitality suites, receptions and other activities have all been successful and should be considered.** (These events may not be held during conference hours.)

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## CONFERENCE SPONSORSHIPS

As noted, the CFDD does not offer the typical Platinum, Gold and Silver type sponsorships. Sponsorships are available, but they are not generally packaged with the exhibition booths.

As the premier event for retirement advisors, the CFDD's Advisor Conference is an excellent venue for sponsorship investing. The CFDD's sponsorships are unique and priced more reasonably than our competitors. In addition to maximizing exposure, **marketing to more than 1,000 retirement specialists in one location is both smart & cost effective.**

**The CFDD's sponsorships are integrated and promoted far in advance of the conference.** While exposure varies by sponsorship, the national marketing campaign includes our website, e-mail newsletter, pre-conference marketing material, onsite handout material, signage, presentation screen recognition, on stage presence, the Kick-Off Party and prizes & awards. Additional exposure is offered through dedicated stations, photo-ops, the *Post Conference Guide* and more.

Details on the various sponsorships are available in the *Conference Sponsorships* document, located on the 2009 Advisor Conference homepage under Exhibitor Information. The 2009 Advisor Conference homepage is located at: <http://www.thecfdd.com/cfddconference2009>. The document may also be viewed directly by linking to: <http://www.thecfdd.com/files/conf2009/09Sponsorships.doc>.

CFDD '09 Sponsorships with major exposure and value include:

- **Kick-Off Party**
- **Luxury Dude Ranch Vacation For Two**
- **Western Attire Awards**
- **Conference CD-ROM**
- **Photography Sponsorship**

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## 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.

The raffle promotion will be integrated into the conference marketing material and included in the program handout 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 Luxury Dude Ranch Vacation 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 7, 2009. Raffle prize winners are also eligible for the grand prize vacation drawing.

**ALL registered attendees are eligible for the CFDD '09 Grand Prize, The Attire Awards and the Raffle Prizes.** To qualify, an attendee's passport must be 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 (stamps & passports provided by CFDD).

To facilitate the storage, drawing and shipping of raffle prizes, sponsors are encouraged to donate small prizes and gift certificates. Sponsors may also ship prizes directly to the winner.

## CONFERENCE ATTENDANCE LIST

The CFDD is distinguished by posting a sortable Excel spreadsheet of registrants to a secure area of the conference home page well in advance of the event. The dynamic list includes 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 and timely manner.

To preclude the marketing feast and protect the privacy of registrants, **the detailed 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 may use the attendance list to promote their role in the CFDD '09 conference. 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.

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## CONFERENCE/EXHIBITION HOURS

Pre-conference events include the CFDD's Old/Wild West-themed Kick-Off Party. The entertainment will include roping, riding, shootouts, music, dancing, food, cocktails, attire awards and more. **The Kick-Off Party is scheduled from 7:00 p.m. – 9:30 p.m. on Sunday evening, 10/4/09.**

Official conference registration starts on Monday morning, 10/5/09, at 6:30 a.m. and will remain open throughout the conference. As a courtesy and to avoid congestion, **early registration will open at 3:00 p.m. on Sunday, 10/4/09, and remain open throughout the Kick-Off Party.**

<p><b>Exhibition hours will be 7:00 a.m. – 6:30 p.m. on Monday and Tuesday and 7:00 a.m. – 11:00 a.m. on Wednesday. Exhibitor setup will open at 4:00 p.m. on Sunday, 10/4/09, and must be completed before 7:00 a.m. on Monday morning. Teardown is scheduled from 11:00 a.m. – 3:00 p.m. on Wednesday, 10/7/09.</b></p>
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The daily breakout sessions will start at 7:30 a.m. and end at 5:30 p.m. on Monday and Tuesday. The two and one-half day event will conclude with three morning general sessions and the Raffle/Grand Prize drawing. Official activities will end just before noon on Wednesday, 10/7/09.

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In addition to the Kick-Off Party, complimentary open bar cocktail parties will be hosted from 5:30 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 6:30 a.m. – 7:30 a.m. Complimentary lunches will be served on Monday and Tuesday from 12:45 p.m. – 1:45 p.m.

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## **HOTEL ACCOMMODATIONS/RESERVATIONS**

Rated five-diamond by AAA, the Fairmont Scottsdale 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, ideal setting, luxury resort, top ranked spa, accommodating staff, premier meeting facilities, ideal reception facilities and discounted rates, registrants may enjoy two 18-hole championship golf courses. Additional amenities include tennis, award winning restaurants, five swimming pools and unmatched local attractions.

While luxury resort hotels tend to be expensive, the CFDD has negotiated a discounted group rate of \$219 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 for children under 18, self-parking is free and the portorage & high speed internet connection fees have been waived for our conference attendees.

October is a busy time of year for Arizona hotels and it's important to **make your hotel reservations as soon as possible.** Hotel space is limited and rates could increase significantly after our 9/4/09 cutoff date. Reservations after the cutoff date, or exceeding our 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 Resort directly by calling (480) 585-4848 or (800) 344-4758.

Online reservations can be made by linking directly to the CFDD's dedicated reservations page at: [https://resweb.passkey.com/Resweb.do?mode=welcome\\_ei\\_new&eventID=84813](https://resweb.passkey.com/Resweb.do?mode=welcome_ei_new&eventID=84813). The Fairmont's system has been upgraded and the entry of a promotional code is no longer required for online reservations.

If you reserve your room by phone, **YOU MUST MENTION THAT YOU ARE ATTENDING THE CENTER FOR DUE DILIGENCE CONFERENCE to obtain our group rate. If you do not mention the CFDD, you may be told the hotel is sold out.** The conference hotel is expected to sell out early, so it is recommended that you book your room as soon as possible. If the Fairmont is sold out when you call, it is strongly suggested that you place your name on their wait list.

As noted, the conference is scheduled from October 5 – 7, 2009 over a Monday-Wednesday period, but pre-conference social activities are scheduled for Sunday, 10/4/09. Exhibitor setup starts at 4:00 p.m. on Sunday and the conference Kick-Off 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 activities, spend a few days with the family or take advantage of local attractions, please be sure to **book your hotel and travel arrangements accordingly.**

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## CFDD VALUE PROPOSITION FOR EXHIBITORS

- **Premier Conference For Retirement Plan Advisors**

- **Unmatched Advisor Attendance** (More accomplished retirement plan advisors attend the CFDD's Conference than any other industry event.)

- **Dynamic Spreadsheet Of Registrants Posted On The Conference Home Page In Advance Of Event**

- **Opportunity To Network With The Elite In An Ideal & Controlled Environment**

- **Exhibitor Fee Includes Ten (10) Conference Registrations With Full Access To All Events & CFDD Website (Booth is virtually free)**

- **Additional Registrations Available At A 50% Discount**

- **Discount On CFDD Website & Newsletter Banners Ads**

- **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**

- **Support & Promotion of Wraparound/Social Activities**

- **Unrestricted Audio, Video & Photo Opportunities**

- **Unique & Competitively Priced Sponsorships With Major Exposure**

- **Post-Conference Guide Advertising Discount**

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**PRE-CONFERENCE WRAPAROUND ACTIVITIES**

**SUNDAY, 10/4/09**

**Conference Registration Desk Opens**

3:00 p.m. – 9:30 p.m.

Outside- Porte Cochere

**Exhibitor Setup**

4:00 p.m.

Conference Center

**Kick-Off Party**

7:00 p.m. – 9:30 p.m.

Princess Plaza

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**CONFERENCE DATES**

2 ½ Days

Monday - Wednesday

October 5-7, 2009

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**CONFERENCE LOCATION/HOTEL**

The Fairmont Scottsdale Resort

7575 East Princess Drive

Scottsdale, AZ 85255

(800) 344-4758

(480) 585-4848

(480) 585-0091 fax

Email: [Scottsdale@fairmont.com](mailto:Scottsdale@fairmont.com)

<http://www.fairmont.com/scottsdale/>

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## SET-UP

Sunday, October 4, 2009

4:00 p.m. - Midnight

*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 5, 2009.*

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## CONFERENCE EVENTS/ HOURS

### Sunday, October 4, 2009

3:00 p.m. – 9:30 p.m. Registration Desk Opens Early & Closes Late

7:00 p.m. – 9:30 p.m. Kick-Off Party

### Monday, October 5, 2009

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

### Tuesday, October 6 2009

6:30 - 7:30 a.m.     **Registration & Breakfast** (*Registration remains open throughout the conference*)  
7:30 - 7:45 a.m.     Introduction & Day Two Highlights  
7:45 - 8:45 a.m.     Keynote  
8:45 - 9:15 a.m.     Networking In Exhibitor Area/Break (30 minutes)  
9:15 - 10:15 a.m.    Breakout Sessions (4)  
10:15 - 10:30 a.m.   Networking In Exhibitor Area/Break (15 minutes)  
10:30 - 11:30 a.m.   Breakout Sessions (4)  
11:30 - 11:45 a.m.   Networking In Exhibitor Area/Break (15 minutes)

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12:45 - 1:45 p.m.    **Lunch**  
1:45 - 2:45 p.m.    Breakout Sessions (4)  
2:45 - 3:00 p.m.    Networking In Exhibitor Area/Break (15 minutes)  
3:00 - 4:00 p.m.    Breakout Sessions (4)  
4:00 - 4:30 p.m.    Networking In Exhibitor Area/Break (30 minutes)  
4:30 - 5:30 p.m.    Breakout Sessions (4)  
5:30 - 6:30 p.m.    **Cocktail Party**

**Wednesday, October 7, 2009**

6:30 - 7:30 a.m.    **Breakfast**  
7:30 - 8:30 a.m.    General Session  
8:30 - 8:45 a.m.    Networking In Exhibitor Area/Break (15 minutes)  
8:45 - 9:45 a.m.    General Session  
9:45 - 10:00 a.m.    Networking In Exhibitor Area/Break (15 minutes)  
10:00 - 11:00 a.m.    General Session  
11:00                **Raffle & Grand Prize Luxury Dude Ranch Vacation Drawings**

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**BOOTH EXHIBITION HOURS**

Monday, October 5, 2009

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

Tuesday, October 6, 2009

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

Wednesday, October 7, 2009

7:00 a.m. - 11:00 a.m.

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**TEAR DOWN**

Wednesday, October 7, 2009

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, 10/7/09, 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 or shipping of exhibitor materials.*

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**PAYMENT**

All exhibition fees must be paid in advance of booth assignment. Sponsorships and registrations in addition to the ten (10) included in the exhibition fee will be billed separately.

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**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.

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**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.

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**BADGES**

The names and full contact information for all exhibitor personnel, including booth personnel, must be provided to the CFDD no later than 9/20/09. **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 larger 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.**

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**AFFILIATED EVENTS**

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

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**PHOTOGRAPHY, LIGHTING, SOUND, VIDEO & AUDIO TAPING**

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

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

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**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 Resort.

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**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 2009 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.

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**CONFERENCE INTERRUPTION**

If for any reason, the 2009 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.

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**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.

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**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.

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**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 these and other miscellaneous needs.

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**ATTIRE**

The Fairmont Scottsdale is a desert climate resort and casual dress is strongly recommended.

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**SHIPPING**

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

**First Label:**

**Brede Exposition Services**

C/O YRC

2021 S. 51<sup>st</sup> Ave

Phoenix, AZ 85043

**Please include the following additional information on a second label:**

- 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

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**PACKAGES, STORAGE & MATERIALS HANDLING**

It is strongly suggested that all advance materials be sent to Brede Exposition Services. The Fairmont Scottsdale 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 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, please contact the hotel's Shipping and Receiving Department at (480) 585-4848, Extension 7809 two weeks prior to the incoming dates.

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**CONTACT INFORMATION:**

**CFDD**

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

**The Fairmont Scottsdale Resort**

7575 East Princess Drive  
Scottsdale, AZ 85255  
(800) 344-4758  
(480) 585-4848  
(480) 585-0091 fax  
Email: [Scottsdale@fairmont.com](mailto: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](mailto: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](mailto: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>

**CFDD 2009 ADVISOR CONFERENCE EXHIBITOR FORM**

October 5-7, 2009 (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

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

## CFDD 2009 ADVISOR CONFERENCE EXHIBITOR FORM

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

- 8'x10' Booth\*
- **10 Full Conference Registrations\***
- Additional Registrations At 50% Discount
- Listing In Conference Handout Material
- Link On CFDD’s “Provider Links” Page (<http://www.401kduediligence.com/links.asp>)
- Excel Spreadsheet Of Registrants
- **Discount On CFDD Website & Newsletter Banner Ads**
- Competitively Priced Sponsorships With Major Exposure
- **Opportunity To Participate In The Agenda**
- **Social/Wraparound Activity Support & Promotion**
- Post-Conference Guide Advertising Discount

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

The CFDD’s Advisor Conference offers **more value than any other industry event**. Since ten (10) 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, expand your universe and benefit from the discounts mentioned above, 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 of choice from available inventory. Conference registrations may be substituted at anytime, but all registrations for exhibitor personnel must be assigned two weeks before the conference. Non-exhibitor personnel registrations must be assigned by 9/4/09.*

## **CENTER FOR DUE DILIGENCE**

P.O. Box 8 • Western Springs, Illinois 60558  
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E-mail: [CFDD@TheCFDD.com](mailto:CFDD@TheCFDD.com)

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

### **2009 ADVISOR CONFERENCE HOTEL RESERVATION INFORMATION** (Contact Fairmont Directly)

October 5-7, 2009 (Monday -Wednesday)  
The Fairmont Scottsdale Resort  
Scottsdale, Arizona

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Hotel reservations now being taken at:

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

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

Online reservations can be made by linking directly to the CFDD's dedicated reservations page at: [https://resweb.passkey.com/Resweb.do?mode=welcome\\_ei\\_new&eventID=84813](https://resweb.passkey.com/Resweb.do?mode=welcome_ei_new&eventID=84813). The Fairmont's system has been upgraded and the entry of a promotional code is no longer required.

If you reserve your room by phone, **YOU MUST MENTION THAT YOU ARE ATTENDING THE CENTER FOR DUE DILIGENCE CONFERENCE to obtain our group rate.** If you do not mention the CFDD, you may be told the hotel is sold out. The conference hotel is expected to sell out early, so it is recommended that you book your room as soon as possible. If the Fairmont is sold out when you call, it is strongly suggested that you place your name on their wait list.

October is a busy time of year for Arizona hotels and it's important to **make your hotel reservations as soon as possible.** Hotel space is limited and rates could increase significantly after our 9/4/09 cutoff date. Reservations after the cutoff date, or exceeding our 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 the rate. Individuals are responsible for their own room, tax, incidental charges and other authorized charges. Individuals/groups who fail to cancel room reservations ten days before their date of arrival will be charged the room rate plus tax for one night by the hotel.

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