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Subject: **2010 ADVISOR CONFERENCE MOVES TO CHICAGO:
Refined With A More Intimate Approach & Complimentary Advertising**

Thank you for making the CFDD's 2009 Advisor Conference a continued success. In spite of a challenging environment, more than 800 retirement plan specialists registered for the October 5-7, 2009 Advisor Conference, *ADAPT, SURVIVE & PROSPER: A Bull Market In BOR Changes*.

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

The CFDD is widely known as the "King of Content." While we remain focused on helping advisors grow their business, we are not resting on our title. Indeed, we have aggressive plans in motion to **continue the expansion of our advisor base, refine the CFDD's Advisor Conference, add even more value and help clients capture additional business.**

THE CFDD'S ADVISOR BASE CONTINUES TO GROW

To the benefit of our vendor sponsors, **the CFDD's advisor base continues to expand.** Through four major new initiatives, hundreds of advisors have been added to our distribution list in recent months alone, including an increasing number of independent RIAs. The four initiatives are discussed below. Other blockbuster type initiatives are also under development.

To maintain the growth of our advisor base, **the CFDD has forged an alliance with The Institute of Business & Finance (IBF).** The IBF offers five of the oldest designations in the financial services industry. Over 13,000 individuals have completed their Certified Fund Specialist[®] program, the oldest designation in the mutual fund industry.

Additionally, we are developing **training alliances with select broker-dealers** that center around our Advisor Conference. The CFDD's new online plan sponsor RFP service for ERISA Advisor Evaluation (EAE) is also gaining momentum and it will further grow our advisor base.

The EAE program will change the way retirement plans business is consummated and professionalize the advisor selection process. To benefit advisor clients, **the EAE program will facilitate the consolidation of retirement plan advisory services and drive business to specialists in the CFDD's network.**

The sales process has become more complicated and getting a foot in the door requires a different approach today. Traditional marketing and telemarketing are no longer effective. **The EAE's new plan sponsor marketing initiatives will increase advisor activity as well as showcase their value proposition.**

While the EAE program is still in development, advisors have recognized the marketing power of the EAE program. Fueled by advisor referrals, **we are already receiving requests from plan sponsors for lists of advisors who meet their needs.**

Broker of record consolidation is the primary path to growth and **our business building InnerCircle TeleConference series is also contributing to the growth of the CFDD's advisor base.**

CFDD 2010: MORE REFINED, INTIMATE & INTEGRATED

To benefit sponsors & advisors, enhance learning and facilitate more meaningful networking, **the refined 2010 conference will offer a more intimate, integrated and cohesive program.**

As a bottom-up organization, your feedback is important to us. Please email your suggestions for the 2010 conference, including topic suggestions, tracks, alternative learning and ways to make the event even more productive to CFDD@TheCFDD.com. **If you would like to participate in the agenda, it is strongly suggested that you get involved early.**

The CFDD's October 6-8, 2010 Advisor Conference will be held at the downtown Fairmont Chicago Hotel. The two and one-half day event will be hosted over a Wednesday - Friday period and any wraparound activities will take place on Tuesday, 10/5/2010.

As a centrally located destination, business friendly city and resource rich area, **Chicago has no equal as a conference location.** Rising gracefully above Millennium Park and the impressive lakefront, the Fairmont Chicago is the city's premier sophisticated event hotel. The four-diamond luxury hotel's location also provides countless opportunities for those for those wishing to enjoy Chicago's world class attractions.

While the Chicago Fairmont's floor plan is networking friendly, the exhibition space is limited to sixty booths. As a result, **vendors should select their booths early.** Vendors who complete & return their exhibitor form with payment before 12/31/09 may apply a 15% early registration discount. The discount will not be honored after 12/31/09.

DEVELOPING A CONFERENCE STRATEGY

Developing a conference strategy and leveraging an event's success can produce powerful results. Resources should, however, be used effectively and conferences heavily attended by clients should be prioritized.

At a minimum, exhibitors should request presence on the agenda, send the appropriate personnel, select a good booth location and use creative initiatives to drive traffic to their booth.

Leveraging alliance partners is also important because in addition to cost sharing, it provides greater exposure and facilitates advisor introductions.

In addition to exhibiting and the aforementioned, sponsorships and wraparound events should also be considered. Indeed, **marketing to a large pool of clients in one location is both smart marketing and cost effective.**

COMPLIMENTARY ADVERTISING

To help clients expand their marketing footprint and position for the economic recovery, **the 2010 exhibition package includes complimentary banner ads on the CFDD's website & in our email newsletter.**

Our highly ranked website attracts the industry's most accomplished advisors. Website traffic continues to grow and each visitor clicks deep into our content rich data. **The CFDD's website averages over 200,000 page visits per month and our highly targeted email newsletter reaches an audience of over 30,000.** The CFDD's database of retirement plan advisors is also unmatched and the read rate of our newsletter is exceptionally high.

Given the current economic conditions, vendors should be extra smart with budgetary management and develop their conference strategy early. As most vendors have a line item budget under Marketing for conferences and a PR budget for advertising, **allocating advertising dollars towards a CFDD exhibitor booth package provides twice the value.**

In addition to capturing the discount, **exhibitors who register early could benefit from one year of complimentary advertising and repeated exposure to the industry's richest database of retirement plan specialists.** The recession forced many to limit their advertising & marketing expenditures and we **are pleased to offer exhibitors complimentary advertising with a value in excess of \$25, 000.**

To jumpstart your engine and take advantage of this unmatched value, complete and return the attached form with payment. Advertising space and booth locations are limited and available on a first come, first-served basis.

CFDD 2010 ADVISOR CONFERENCE EXHIBITOR FORM

October 6-8, 2010 (Wednesday - Friday)
The Fairmont Chicago
200 N. Columbus Drive
Chicago, IL 60601

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: _____

CFDD 2010 ADVISOR CONFERENCE EXHIBITOR PACKAGE

In addition to **more accomplished retirement plan advisor attendance than any other industry event**; the CFDD limits exhibitors to maintain an “advisor-centric” atmosphere. The conference offers intimate networking opportunities, a prestigious hotel and an opportunity to participate in the agenda. Non-competing **wraparound activity is encouraged** 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>)
- Dynamic Excel Spreadsheet Of Registrants Posted Months In Advance
- **Complimentary Newsletter & Website Banner Ads**
- **Opportunity To Participate In The Agenda**
- Wraparound Activity Support & Promotion
- **15% Early Registration Discount If Paid By 12/31/09**
- Post-Conference Guide Advertising Discount

The CFDD's Advisor Conference offers **more value than any other industry event**. Since ten (10) registrations 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, benefit from the discounts mentioned above and take advantage of the complimentary advertising, complete this form and return it with a check for \$8,750 to the address below.

Vendors who complete & return their exhibitor form with payment before 12/31/09 may apply the 15% discount and register for \$7,500. **The discount will not be honored after 12/31/09.**

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** 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 9/3/2010.*