

## **CENTER FOR DUE DILIGENCE**

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Date: April 24, 2010

To: Exhibitors, Sponsors & Vendors

Subject: **Exhibitor Information & Form:  
2010 Advisor Conference**

The information in this document is designed to give vendors a summary of the exhibition package for the CFDD's October 6-8, 2010 Advisor Conference.

For information applicable to individual registration, the agenda, sponsorships and other conference specifics, go to the CFDD's 2010 Advisor Conference home page located at:

<http://www.thecfdd.com/CFDDconference2010>.

With the exception of the Grand Prize, Kick-Off Party and conference CD-ROM sponsorships, the CFDD does not combine exhibition booths with sponsorships, i.e., **vendors may select sponsorships, an exhibition booth or both.**

**The CFDD's October 6-8, 2010 Advisor Conference will be held at the conveniently located downtown Fairmont Chicago-Millennium Park Hotel.** The two and one-half day event will be hosted over a Wednesday-Friday period.

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 event hotel. The AAA four-diamond luxury hotel's location also provides countless opportunities for those wishing to enjoy Chicago's world class attractions.

The CFDD's Advisor Conference remains distinguished by an unbiased approach, a content rich agenda, advisor attendance, value, CE credits, networking opportunities, complimentary advertising, interviews and new media marketing. **MORE ACCOMPLISHED RETIREMENT PLAN ADVISORS ATTEND THE CFDD'S ADVISOR CONFERENCE THAN ANY OTHER INDUSTRY EVENT. Our ratio of advisors to registrants is also unequalled.**

In addition to 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 '10 offers all registrants eligibility for the grand prize, the attire awards and other prizes.**

While the more intimate Chicago Fairmont can only accommodate sixty exhibition booths, all booth locations are traffic friendly. To facilitate networking, food and beverage is confined to the exhibition area. Given the limited space, **exhibitors should register early.**

## WHAT'S NEW FOR 2010?

While CFDD '09 was another homerun, CFDD '10 is **designed more intimately to facilitate enhanced learning and deeper networking**. Specific education tracks will be threaded throughout the event and more advisor roundtables will be included in the program, including spirited after hour meetings.

Additionally, our new and unique **New Media marketing initiatives, i.e., a virtual exhibit hall, *The CFDD Internet Broadcasting Station* interviews & business development videos, will heighten client visibility and further distinguish the CFDD.**

Consistent with our past events, attendees will benefit from a themed Kick-Off Party, attire awards, a grand prize and other prizes. While the CFDD's 2008 Biker and 2009 Wild West themes were huge successes, this year **CFDD '10 will feature a 50's theme** to keep things fresh.

To bridge the conference's educational demands and create a relaxed atmosphere, the **CFDD's lively 50's theme will include music, cocktails, dancing, professional entertainers, an Elvis impersonator and major photo-ops for sponsors.**

**In addition to hula hoop, twist and Fonz look-a-like contests held during the Kick-Off Party, the conference will feature authentic 50's His & Hers Attire Awards, a Grand Prize Trip To Graceland for two and other themed contest prizes.**

The contest winners and those donning the most authentic 50's attire will be awarded valuable prizes during the Tuesday evening Kick-Off Party. The Grand Prize Trip To Graceland will be awarded after the concluding event just before noon on Friday

All registrants, including exhibitor personnel are eligible for the attire awards, the grand prize and all other prizes. Winners must be present to claim their prizes.

The '57 Chevy may be no more than a ghost, but cats & chicks can still roll up t-shirt sleeves, don retro sunglasses, poodle skirts, pony tails, ducktails and network. Indeed, networking opportunities are enhanced in a fun and outreach friendly environment.

As noted, the CFDD plans to host more intimate events going forward and the Fairmont's facilities are ideal for this purpose. To maximize exhibitor exposure, **ALL FOOD, COCKTAIL PARTIES AND BEVERAGE STATIONS WILL BE CONFINED TO THE EXHIBITOR AREA.** The beverage stations will be strategically located to optimize booth traffic and the networking break times after the daily keynote sessions have been extended.

With the exception of the Grand Prize, Kick-Off Party and conference CD-ROM sponsorships, the CFDD does not combine exhibition booths with sponsorships. However, the CFDD's 2010 sponsorships have been repackaged with more agenda presence. **In addition to major marketing exposure, the sponsorships offer unmatched value and meaningful return on investment.**

In addition to our New Media marketing initiatives, **the CFDD will help exhibitors promote their own wraparound activities** through our virtual exhibit halls, but these activities cannot be hosted during conference hours or events.

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### **COMPLIMENTARY/PACKAGED ADVERTISING**

To help clients expand their marketing footprint and position for the future, the 2010 exhibition package includes **complimentary banner ads on the CFDD's website and in our email newsletter with a value up to \$25,000.**

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 300,000 page visits per month and our email newsletter reaches a highly targeted & constantly expanding audience of over 35,000 retirement plan professionals.**

Given the current economic conditions, prudent vendors recognize the importance of 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.**

The CFDD already offers more value and attracts more accomplished retirement plan advisors than any other industry event. To add even more value, exhibitors who register early could benefit from **COMPLIMENTARY ADVERTISING AND EXTENDED EXPOSURE TO THE INDUSTRY'S RICHEST DATABASE OF RETIREMENT PLAN SPECIALISTS WITHOUT ADDITIONAL COST.**

The recession forced many to limit their advertising and marketing expenditures. As a result, we are pleased to offer exhibitors this unique and complimentary advertising. 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.

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## ENHANCED EXPOSURE: INTERNET BROADCASTING & A VIRTUAL EXHIBIT HALL

The CFDD has one mission, to help our clients grow their business. To add additional value and distinguish the CFDD, we are aligning with Internet Broadcasting platforms and other new media strategy providers. In addition to upping the ante on our competitors, our goal is to **heighten client visibility and bring retirement plans content as well as conference presence to internet broadcasting.**

The enhanced exposure at CFDD '10 includes *The CFDD Internet Broadcasting Station* interviews and a “separate” Virtual Exhibit Hall that is visibly linked from the conference homepage. The Virtual Exhibit Hall includes an optional Exhibitor Profile Page and Business Development Videos.

As a bonus, **KEY INDIVIDUALS REPRESENTING EXHIBITORS AND SPONSORS WILL BE INTERVIEWED AT NO COST BY THE CFDD STATION, an upcoming internet broadcasting radio station** devoted exclusively to retirement plans content. While the initial interview should be a value proposition summary, **exhibitors may take advantage of the opportunity and purchase additional interview time for a nominal fee.**

The pre-recorded audio interviews, included with the exhibitor package, will be hosted and aired 24/7 on *The CFDD Station*. Each interview will open to a dedicated web page with a photo, bio and URL link. To broaden the audience, the descriptive written content is designed to optimize and drive search engine traffic to each interview. As an added bonus, the interviews will be dated and remain archived and accessible on *The CFDD Station*.

In addition to encouraging attendees and others to listen to their interviews, participating vendors benefit from pre-existing **constant online traffic driven by multiple portals, stations, channels, shows and advertising.** To generate even more traffic, the media is cross-linked and promoted within the broadcasting platform as well as channels on *The CFDD Station*, i.e., Conference, Expert Advisors, Content, EAE, etc.

In addition to the Internet Broadcasting initiative, CFDD '10 will include a Virtual Exhibit Hall. In lieu of a booth number, **A MAP OF THE VIRTUAL EXHIBIT HALL WILL INCLUDE EACH EXHIBITOR'S NAME.** The optional Profile Page (firm description, wraparound events, URL, audio interview & attendee contact information) and Business Development Videos will be posted in the virtual exhibit hall. The business development videos may also be posted to *The CFDD Station*.

The Virtual Exhibit Hall content will remain archived and accessible until the next conference while *The CFDD Station* content will remain archived permanently. Participating exhibitors may also use the business development videos and audio interviews for their own independent marketing purposes.

These innovative enhancements increase exposure by allowing attendees and others to **cyber visit with conference sponsors, exhibitors & speakers before and after the CFDD's advisor conference.** By mimicking the exhibit hall, the Virtual Exhibit Hall facilitates pre-visits for those seeking information

about products and services as well as after-hour visits that anchor information shared during the day. Links to the Virtual Exhibit Hall can also be shared with those who were unable to attend the conference and it is a logical location to post contact information for convenient post conference access.

**TO BE INTERVIEWED BY *THE CFDD INTERNET BROADCASTING STATION*, LEVERAGE OUR VIRTUAL EXHIBIT HALL & PRODUCE YOUR OWN BUSINESS DEVELOPMENT VIDEO**, contact [CFDD@thecfdd.com](mailto:CFDD@thecfdd.com) as early as possible.

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

**The CFDD's October 6-8, 2010 Advisor Conference will be held at the Fairmont Chicago-Millennium Park Hotel.** The two and one-half day event will be hosted over a Wednesday-Friday period, with our Kick-Off Party on Tuesday evening.

In addition to a convenient, resource rich and business friendly location, the Fairmont package offers CFDD attendees:

- AAA Four-Diamond Hotel
- Downtown Millennium Park/Michigan Avenue Location
- Newly Renovated/Superb Facilities
- New SPA/Health Club
- 426 Standard Rooms, 135 Upgraded Deluxe Rooms & Various Suites
- \$219 Standard Room Rate For Double Occupancy
- No Additional Cost For Children Under 18
- Contracted Rate Available 3 Days Prior/After Conference Dates (Based on availability)
- Significant Discounts Apply To Upgraded Rooms & Suites
- No Portage Fee
- High Speed Internet Fee Waived (Requires no cost President's Club membership)
- No Service Charge Add-Ons
- Valet Parking
- Discounted Self-Parking
- Space For 63 Exhibition Booths
- Premier Meeting Facilities

Downtown Chicago has a wide variety of hotels available, from five-star luxury hotels to small, trendy boutiques. Attendees are not obligated to stay in the conference hotel, but as you can see, **we have negotiated a very competitive package for a premium, top rated, downtown Chicago Hotel.**

To facilitate networking, it is strongly recommended that all attendees stay in the conference hotel. To further enhance networking, **spouses may attend all “social” functions without additional cost.**

Given that shuttle services and taxis are conveniently available, we would advise against renting a vehicle and self-parking at downtown Chicago hotels.

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## **EXHIBITION PACKAGE**

Unlike other conference hosts, the CFDD offers only “one” exhibition package. We do not offer complicated packages or generally combine sponsorships with exhibition booths. Exhibition booths, sponsorships and complimentary advertising 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'x10' Booth Package
  - 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
  - Full Access To The CFDD's Website
  - All Personnel Eligible For Prizes & Awards
- **Ten (10) Full Conference Registrations\***
  - Additional Registrations Discounted To \$500
  - Listing In Conference Handout Material
  - Link On CFDD's "Provider Links" Page
  - Access To Web Hosted Dynamic Spreadsheet Of All Registrants
- **Complimentary Banner Ads (CFDD Newsletter & Website)**
  - *The CFDD Internet Broadcasting Station Interviews*
  - **A Virtual Exhibit Hall**
- **Opportunity To Participate In The Agenda**
  - Wraparound/Social Activity Support & Promotion
  - Post-Conference Guide Advertising Discount

*\*Vendors in need of only five (5) conference registrations may exhibit for \$7,500 in lieu of the \$8,750.*

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As you can see, the CFDD's Advisor Conference exhibition package offers **more value than any other industry event**. Since ten (10) registrations are included in the exhibition fee, the *booth is virtually free*.

**The complimentary banner ads on the CFDD's website and in our electronic newsletter are an additional bonus with a value in excess of the exhibition fee.**

In addition to the aforementioned value, the CFDD's networking opportunities are unmatched. Consistent with our previous Chicago-based conferences, **WE EXPECT MORE THAN 1,000 RETIREMENT PLAN EXPERTS TO ATTEND THE CFDD's CONFERENCE, INCLUDING OVER 500 ACCOMPLISHED RETIREMENT PLAN ADVISORS.**

**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 explicit 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 9/6/2010.**

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 9/6/2010. **Refunds to paid individuals who receive a complimentary registration 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 at a discounted price of \$500.** 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 is received. Upon receipt of payment, 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 booth connections are 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 at: <http://www.thecfdd.com/CFDDconference2010>. For more information on booth connections, exhibitors may also contact:

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## **CONFERENCE SPONSORSHIPS**

As noted, the CFDD does not offer the typical Platinum, Gold and Silver type sponsorships. With the exception of the Grand Prize, Kick-Off Party and conference CD-ROM sponsorships, the CFDD does not combine exhibition booths with sponsorships, i.e., **vendors may select sponsorships, an exhibition booth or both.**

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, priced more reasonably than our competitors and offer major value.**

**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, prizes and 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 2010 Advisor Conference homepage under Exhibitor Information. The 2010 Advisor Conference homepage is located at: <http://www.thecfdd.com/cfddconference2010>. The sponsorship document may also be viewed directly by linking to: <http://www.thecfdd.com/files/conf2010/10Sponsorships.pdf>.

To meet individual needs and budgets, the CFDD offers a wide range of sponsorships. Vendors looking for maximum exposure and value may wish to consider the sponsorships below.

- **Kick-Off Party**
  - **Grand Prize Trip To Graceland For Two**
  - **Conference CD-ROM**
  - **His & Hers 50's Attire & Contest Awards**
  - **Photography Sponsorship**
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## **RAFFLE PRIZES**

**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 Trip To Graceland drawing at the conclusion of the conference on Friday at 11:30 a.m. Raffle prizes are limited to one per person and winners must be in attendance for the drawing on October 8, 2010. Raffle prize winners are also eligible for the grand prize drawing.

**ALL registered attendees are eligible for the CFDD '10 Grand Prize, Attire Awards, Contest 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 (passports provided to attendees at registration, stamps provided to exhibitors 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 winners.

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## 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 months 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 conference. Sharing the conference attendance list with non-registrants is, however, strictly prohibited. Additionally, the list may not be copied or used for purposes beyond conference activity.

Please NOTE: 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

**The conference Kick-Off Party is scheduled from 7:00 p.m. – 9:30 p.m. on Tuesday evening, 10/5/2010, in the hotel's lobby level Moulin Rouge room.**

Kick-Off Party entertainment will include cocktails, food, music, dancing, professional entertainers and an Elvis impersonator. In addition to the authentic His & Hers 50's Attire Awards, Hula Hoop, Twist and Fonz look-alike contests will be held during the Kick-Off Party.

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

**Exhibitor setup will open at 4:00 p.m. on Tuesday, 10/5/10, and must be completed before 9:30 p.m. on Tuesday evening.**

**Exhibition hours in the Imperial Ballroom will be 6:30 a.m. – 7:00 p.m. on Wednesday and Thursday and 6:30 a.m. – 11:00 a.m. on Friday.**

**Teardown is scheduled from 11:00 a.m. – 3:00 p.m. on Friday, 10/8/10.**

Daily breakout sessions will start at 7:30 a.m. and end at 5:30 p.m. on Wednesday and Thursday. The two and one-half day event will conclude on Friday with three morning general sessions followed by the Grand Prize drawing. Official conference activities will end just before noon on Friday, 10/8/10.

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

**All cocktail parties, breakfasts, lunches and breaks will be held in the Imperial Ballroom exhibition area, located on the B-2 lower level.**

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## **HOTEL ACCOMMODATIONS/RESERVATIONS**

As a centrally located destination, business friendly city and resource rich area, Chicago has no equal as a conference location. Consistent with the CFDD's "all business" reputation, we have teamed the conference with the city's premier event hotel, the Fairmont Chicago-Millennium Park Hotel.

Rising gracefully above Millennium Park and the impressive lakefront, the AAA four-diamond luxury hotel's location provides countless opportunities for those wishing to enjoy Chicago's world class attractions.

While luxury resort hotels tend to be expensive, the CFDD has negotiated a **discounted group rate of \$219 per night for standard rooms**. Significant discounts are also applicable to upgraded rooms and suites. Based on availability, the discounted rate is available 3 days before/after the conference dates and there is no additional cost for double occupancy or children under 18.

October is a busy time of year for Chicago hotels. Since the world class Chicago Marathon is scheduled for the weekend after the CFDD Conference ends, **hotel reservations should be made as soon as possible**. Hotel space is limited and rates could increase significantly after our 9/14/10 cutoff date. Reservations after the cutoff date, or exceeding our contracted room block, are confirmed on a space and rate available basis only.

**Reservations can be made by phone or online.** To register by phone, contact the Fairmont Chicago-Millennium Park Hotel directly by calling (312) 565-8000 or (800) 526-2008.

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=1487055](https://resweb.passkey.com/Resweb.do?mode=welcome_ei_new&eventID=1487055).

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.** While the conference hotel is expected to sell out early, conveniently located overflow hotel rooms will be available.

As noted, the conference is scheduled from October 6 – 8, 2010 over a Wednesday-Friday period, but exhibitor setup and the conference Kick-Off Party are scheduled for Tuesday, October 5, 2010. If you plan on arriving early, be sure to **book your hotel and travel arrangements accordingly.**

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**CFDD ADVISOR CONFERNECE  
UNMATCHED VALUE PROPOSITON FOR EXHIBITORS**

- **Premier Conference For Retirement Plan Advisors**

• **Unequaled 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 Months In Advance Of The Event**

- **Network With The Elite In An Ideal, Fun & 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 Discount**

• **COMPLIMENTARY Banner Ads** (CFDD Newsletter & Website)

• *The CFDD Internet Broadcasting Station Interviews*

• **Heightened Exposure Via A Virtual Exhibit Hall**

- **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**

- **All Exhibitor Personnel Eligible For Grand Prize, Awards & Contest Prizes**

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

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

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

- **Post-Conference Guide Advertising Discount**

**PRE-CONFERENCE ACTIVITIES**

**TUESDAY, 10/5/10**

**Conference Registration Desk Opens**

3:00 p.m. – 9:30 p.m.

Imperial Foyer

B-2 Level

**Exhibitor Setup**

4:00 p.m. – 9:30 p.m.

Imperial Ballroom

B-2 Level

**Kick-Off Party**

7:00 p.m. – 9:30 p.m.

Fairmont Chicago Hotel

Moulin Rouge Room

Lobby Level

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**CONFERENCE DATES**

October 6-8, 2010

Wednesday – Friday

2 ½ Days

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**CONFERENCE LOCATION/HOTEL**

The Fairmont Chicago - Millennium Park

200 N. Columbus Drive

Chicago, IL 60601

(800) 526-2008

(312) 565-8000

(312) 856-1032 fax

[Chicago@fairmont.com](mailto:Chicago@fairmont.com)

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

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**SET-UP**

Tuesday, October 5, 2010

4:00 p.m. - 9:30 p.m.

*Unless late set-up has been approved by the CFDD, all exhibits must be assembled and staffed by 6:30 a.m. on Wednesday, October 6, 2010.*

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**CONFERENCE EVENTS/ HOURS**

**Tuesday, October 5, 2010**

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

**Wednesday, October 6, 2010**

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)  
11:45 - 12:45 a.m.   Breakout Sessions (4)  
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/Light Snack Break (30 minutes)  
4:30 - 5:30 p.m.     Breakout Sessions (4)  
5:30 - 6:30 p.m.     **Cocktail Party**

**Thursday, October 7, 2010**

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)

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11:30 - 11:45 a.m.     Networking In Exhibitor Area/Break (15 minutes)  
11:45 - 12:45 a.m.     Breakout Sessions (4)  
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/Light Snack Break (30 minutes)  
4:30 - 5:30 p.m.     Breakout Sessions (4)  
5:30 - 6:30 p.m.     **Cocktail Party**

**Friday, October 8, 2010**

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 Trip To Graceland Drawing**

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**BOOTH EXHIBITION HOURS**

Wednesday, October 6, 2010

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

Thursday, October 7, 2010

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

Friday, October 8, 2010

6:30 a.m. - 11:00 a.m.

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**TEAR DOWN**

Friday, October 8, 2010

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 Friday, 10/8/10, without the CFDD’s permission. If permission is granted, exhibitors must make arrangements with SourceOne Events 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 vendor 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 two weeks prior to the conference. **Badges will be provided for all registrants and must be worn at all times.**

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**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 or events** 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 Chicago Hotel.

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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 2010 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 2010 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 SourceOne Events and includes contact information, a menu of "optional" items and shipping instructions. Contact Mike Bojesen (SourceOne Events) at (708) 344-4111 x12 for these and other miscellaneous needs. Mike may also be reached by email at: [mbojesen@sourceoneevents.com](mailto:mbojesen@sourceoneevents.com).

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**ATTIRE**

Business casual dress is strongly recommended.

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## **SHIPPING**

All conference materials should be shipped to SourceOne Events and addressed as follows:

**First Label:**

SourceOne Events  
2600 S. 25<sup>th</sup> Ave.  
Broadview, IL 60155

**Please include the following additional information on a Second Label:**

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

For additional shipping information, please refer to the *Exhibitor Kit* provided by SourceOne Events.

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## **PACKAGES, STORAGE & MATERIALS HANDLING**

It is strongly suggested that all advance materials be sent to SourceOne Events. The Fairmont Chicago 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 Chicago will bill you for receiving packages as well as shipping packages out. SourceOne Events will also bill for the same. To avoid double billing, please ship directly to SourceOne Events. For more information on shipping to the Fairmont Chicago, please contact the hotel's Shipping and Receiving Department at (312) 565-8000 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 Chicago - Millennium Park**

200 N. Columbus Drive  
Chicago, IL 60601  
(800) 526-2008  
(312) 565-8000  
(312) 856-1032 fax  
[Chicago@fairmont.com](mailto:Chicago@fairmont.com)  
<http://www.fairmont.com/chicago>

**SourceOne Events**

Mike Bojesen  
2600 S. 25<sup>th</sup> Ave  
Broadview, IL 60155  
(708) 344-4111 x12  
(630) 303-8142 cell  
(708) 344-3050 fax  
[mbojesen@sourceoneevents.com](mailto:mbojesen@sourceoneevents.com)  
[www.sourceoneevents.com](http://www.sourceoneevents.com)

**Audio Visual**

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**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 2010 ADVISOR CONFERENCE EXHIBITOR FORM**

October 6-8, 2010 (Wednesday - Friday)  
The Fairmont Chicago - Millennium Park  
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 Company Description:** \_\_\_\_\_  
\_\_\_\_\_  
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# CENTER FOR DUE DILIGENCE

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

E-mail: [CFDD@TheCFDD.com](mailto:CFDD@TheCFDD.com)

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

## CFDD 2010 ADVISOR CONFERENCE EXHIBITOR PACKAGE

In addition to **more accomplished retirement plan advisor attendance** than any other industry event, exhibitors are limited to maintain an “advisor-centric” atmosphere. The conference offers intimate networking opportunities, an ideal business location, an opportunity to participate in the agenda and complimentary advertising. Non-competing wraparound activity is encouraged and the \$8,750 exhibition fee includes:

- 8'x10' Booth\*
- **10 Full Conference Registrations\***
- Additional Registrations Available At A Discount
- Listing In Conference Handout Material
- Link On CFDD’s “Provider Links” Page
- Dynamic Excel Spreadsheet Of Registrants
- **Complimentary Banner Ads (CFDD Newsletter & Website)**
- ***The CFDD Internet Broadcasting Station Interviews***
- **Heightened Exposure Via A Virtual Exhibit Hall**
- **Opportunity To Participate In The Agenda**
- **Support & Promotion Of Wraparound/Social Activities**
- Post-Conference Guide Advertising Discount

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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**. The complimentary banner ads are an additional bonus with a value in excess of the exhibition fee. To register for this premier event, secure limited exhibition space, network with elite retirement advisors, expand your universe and take advantage of the **complimentary advertising**, complete this form and return it with a check to the address below. Vendors in need of only five (5) conference registrations may exhibit for \$7,500 in lieu of the \$8,750. To register online and pay by credit card, go directly to: <http://www.regonline.com/Checkin.asp?EventId=780348>.

**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 9/6/2010.*

## **CENTER FOR DUE DILIGENCE**

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

E-mail: [CFDD@TheCFDD.com](mailto:CFDD@TheCFDD.com)

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

### **CFDD 2010 ADVISOR CONFERENCE HOTEL RESERVATION INFORMATION** (Contact Fairmont Directly)

October 6-8, 2010 (Wednesday - Friday)  
The Fairmont Chicago - Millennium Park  
Chicago, IL 60601

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Hotel reservations now being taken at:

**Fairmont Chicago-Millennium Park Hotel**  
200 N. Columbus Drive  
Chicago, IL 60601  
**(800) 526-2008**  
**(312) 565-8000**

**Reservations can be made by phone or online.** To register by phone, contact the Fairmont Chicago Hotel directly by calling (312) 565-8000 or (800) 526-2008.

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=1487055](https://resweb.passkey.com/Resweb.do?mode=welcome_ei_new&eventID=1487055). 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.** While the conference hotel is expected to sell out early, conveniently located overflow hotels will be available.

October is a busy time of year for Chicago hotels and the world class Chicago Marathon is scheduled for the weekend after the CFDD Conference ends. As a result, **hotel reservations should be made as soon as possible.** Hotel space is limited and rates could increase significantly after our 9/14/10 cutoff date. Reservations after the cutoff date, or exceeding our contracted room block, are confirmed on a space and rate available basis only. Applicable state and local taxes 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 three days before their date of arrival will be charged the room rate plus tax for one night by the hotel.

As noted, the conference is scheduled from October 6 – 8, 2010 over a Wednesday-Friday period, but exhibitor setup and the conference Kick-Off Party are scheduled for Tuesday, October 5, 2010. If you plan on arriving early, be sure to **book your hotel and travel arrangements accordingly.**