



**ACT BY
JUNE 15th**

THEME: POWERFUL COMPETITION - The Secret to Economic Resilience

Make your presence prominent at this new global financial education event.

NOVEMBER 10 - 13, 2019 IN PUERTO VALLARTA

PARTNERSHIP PACKAGE

THE PROGRAM:

DAY 1 - SUNDAY, NOVEMBER 10

Registration, Newcomers Reception and Grand Opening Reception

DAY 2 - MONDAY, NOVEMBER 11

Theme: Economic Resilience in Creating Family Wealth

DAY 3 - TUESDAY, NOVEMBER 12

Theme: Client Relationship Management, Ethics and Compliance

DAY 4 - WEDNESDAY, NOVEMBER 13

Theme: New Opportunities in Wealth Distribution

“A forum for advisors to learn, share, and evolve their businesses while experiencing relevant and timely content.”

- Barbara Foy-Pilchner,
National VP, Key Accounts, Manulife Investments

Experience Education Differently and Be a Game Changer.

To apply and propose your educational topic, see reverse.
Send to: registrar@knowledgebureau.com.

A MESSAGE FROM THE FOUNDER AND PRESIDENT

JOIN US FOR AN AMAZING OPPORTUNITY TO PARTNER IN A WORLD-CLASS FINANCIAL CONFERENCE.

Now in its 16th year, the **Distinguished Advisor Conference** is the pre-eminent gathering of independent financial service providers!



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WHEN AND WHERE?

DAC 2019 will be held November 10 - 13, 2019 at the Westin Hotel by the Marina, in sunny Puerto Vallarta, Mexico.

WHO ATTENDS?

As described in the PowerPoint presentation attached, this conference is unique in its diversity - it's the secret to providing specialized, holistic wealth management services to leaders from the tax, financial and accounting industries.

WHY YOU SHOULD BE THERE.

This is an invaluable opportunity to provide and take in the cutting edge in thought leadership about the strategic direction wealth management services and various components - tax accounting and compliance to investment, insurance, retirement, succession and estate planning - is taking.

WHY YOUR THOUGHT LEADERSHIP IS SO IMPORTANT.

It is clear that powerful competition is required against the backdrop of profound disruption: new tax and regulatory requirements, political and market turmoil, unprecedented levels of debt and the projected sluggish economic growth that appears to be coming thanks to demographic change.

This is your opportunity to actively participate in that change management - to inspire and share knowledge about your vision and unique value proposition to move things forward in a positive way in the best interests of the client.

Most important, it is your opportunity to showcase your firm to other leading professionals from across Canada, and increasingly, other parts of the world. The key differentiator: these independent and entrepreneurial professionals are not coming merely to accumulate CE/CPD Credits.

They are serious about investing their time and money in high level, continuing professional education focusing on the future growth of their practices. You will join a "who's who" of delegates and sponsors, and you'll be front and centre in influencing and inspiring them towards economic resilience!

FOR ADVISORS POISED TO GROW: MEET NETWORK, GET INSPIRED!

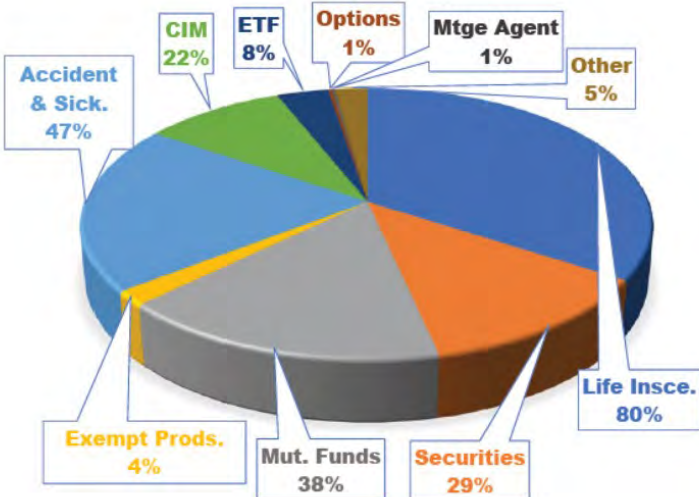
DELEGATE DEMOGRAPHICS

- A multi-disciplinary audience = new opportunities to present your message and be more referable.
- A family of highly engaged advisors interested in your brand and value proposition.
- What you do and how you do it will resonate with this niche audience.
- **Educational Partners:** We will broadly include your message and profile in Knowledge Bureau Report, on the Knowledge Bureau website and through our media partners.



DELEGATE LICENSES HELD BY INDUSTRY

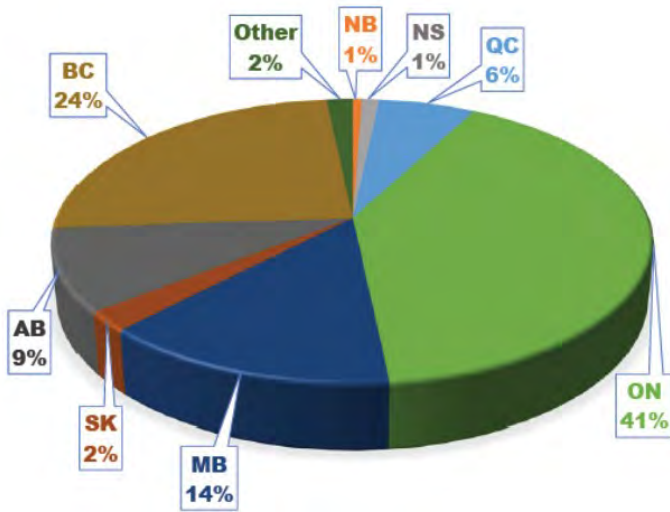
Licences Held*



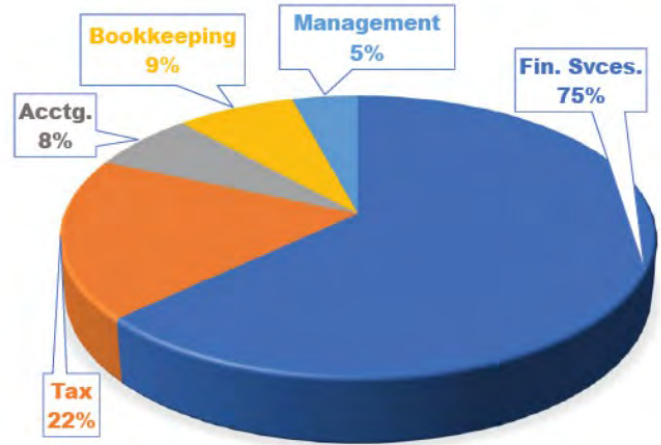
*Total may exceed 100% where delegates report multiple Sectors, Licences or Designations.

DAC DELEGATE INFORMATION

Attendees by Province



Business Sector*



*Total may exceed 100% where delegates report multiple Sectors, Licences or Designations.

13 MORE GREAT REASONS TO COME TO DAC THIS YEAR!

1. **LEARN, NETWORK AND HAVE LOTS OF FUN!**
2. It's all about fresh ideas to poise your future success.
3. Get out of your rut!
4. Shake up your comfort zone.
5. Be inspired like never before.
6. Sharpen your saw and step up your game.
7. Cut through the noise - be fascinated, not bamboozled.
8. Re-energize and re-focus your business and your career.
9. Invest in your business and grow your brand.
10. Make amazing connections and meet fellow change agents.
11. Have access to incredible speakers.
12. Meet new mentors and like-minded people.
13. Take away new tools and resources **AND GO AHEAD ... HAVE SOME FUN!**



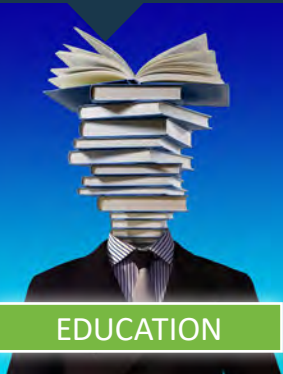
THEME - POWERFUL COMPETITION: The Secret to Economic Resilience

EACH DAY FOCUSES ON AN IMPORTANT THEME ...

- **DAY 1:** The Changing Face of the Global Economy
- **DAY 2:** The Changing Face of Advice
- **DAY 3:** The Changing Face of Relationships



COME TO THE DAC FOR THE ...



EDUCATION



OPPORTUNITY



NETWORKING


“Simply put, this was easily the best industry related conference that I have attended in my 17 years in the business. The speakers line-up was very strong, the content meaningful and ... it was thoroughly provoking and stimulating.”

- Len M., Delegate



WE CAN CUSTOMIZE
YOUR WHOLE EXPERIENCE
JUST FOR YOU ...

Our outstanding event and education planning staff are onsite so that you can have so much more quality time!

 **Knowledge
Bureau**[®]
World-Class Financial Education

JOIN US AT THE 16th ANNUAL DISTINGUISHED ADVISOR CONFERENCE

Theme: Powerful Competition - The Secret to Economic Resilience

This is a diverse audience of influential and successful advisors from all sides of financial services, including leaders in the wealth, insurance and tax advisory businesses. **We are pleased to offer 5 levels of participation in 2019:**

LEVELS (taxes extra):	\$24,500 (2 available)	\$15,500 (1 available)	\$7,500 (12 available)	\$5,500 (4 available)	\$1,500
Lead sponsors: Opening reception or Gala Reception Co-Host	X				
Lunch and Learn Product Presentation	X	X			
On Stage Presentation	X	X	X		
Newcomer's Reception or Graduate Reception or Mimosas Break Sponsor or Breakfast Sponsor				X	
Marketing on website, weekly E-News, social media, banners, journals, signs, etc.	X	X	X	X	X
Onsite trade show table and ad in printed Knowledge Journal	X	X	X	X	X
FREE REGISTRATIONS	4	3	2	1	

PAYMENT DETAILS: All amounts are in Canadian funds until June 15, 2019, after which the are in US funds.

PLEASE PROVIDE YOUR INTEREST IN PRESENTING ON THE FOLLOWING TOPICS OR SUGGEST AN ALTERNATE.

ECONOMIC RESILIENCE:	SHARING KNOWLEDGE IN WEALTH CREATION:	RELATIONSHIP MGMT, ETHICS AND COMPLIANCE	NEW ECONOMY OPPORTUNITIES:
Portfolio Management	Tax Planning with Families	Investor Psychology	Alternative Investments
Liquidity	Planning with Private Corporations	Interest, Inflation and Fees	Centres of Influence
Volatility	Cross-Border Issues	Best Interest Duties	Artificial Intelligence
Global Economy	Retirement Planning	Communications	Incubation Units
Leadership	Succession and Estate Planning	Social Media	Working with Women
Digital Disruption	Philanthropy	Prospecting	Working with Seniors
Regulatory Reform	Debt Management	Referral Strategies	Working with Immigrants

YES! We would like to partner with Knowledge Bureau at DAC 2019! Please indicate level (check):

LEVELS (taxes extra):	<input type="checkbox"/> \$24,500	<input type="checkbox"/> \$15,500	<input type="checkbox"/> \$7,500	<input type="checkbox"/> \$5,500	<input type="checkbox"/> \$1,500
INVOICE TO:					
COMPANY NAME:					
FIRST NAME:			LAST NAME:		
PHONE NUMBER (WORK):			PHONE NUMBER (MOBILE):		
EMAIL:					