



**THEME: POWERFUL COMPETITION - The Secret to Economic Resilience**

An opportunity for advisors from around the globe to connect and consider multi-disciplinary issues

**NOVEMBER 10 - 13, 2019 IN PUERTO VALLARTA**

## PARTNERSHIP PACKAGE

"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

### 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

**Experience Education Differently and Be a Game Changer.**

To apply and propose your educational topic, see reverse.  
Send to: [registrar@knowledgebureau.com](mailto: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!



### **THEME: POWERFUL COMPETITION - The Secret to Economic Resilience**

#### **WHEN AND WHERE?**

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

#### **WHO ATTENDS?**

Leaders from the tax, financial and accounting sectors who aspire to higher education and new concepts. This diverse group is unique; they are ready to take the next step in building their practices and are looking for ideas, partners and products like yours that can take them to the next level.

#### **WHY YOU SHOULD BE THERE.**

This is an invaluable opportunity to meet professionals who want to hear about what you have to offer, through educational experiences as well as one-on-one opportunities, networking and trade show offerings.

#### **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!

# MEET HIGHLY-ENGAGED, INSPIRING ADVISORS POISED TO GROW THEIR PRACTICES AND THEIR CAREERS

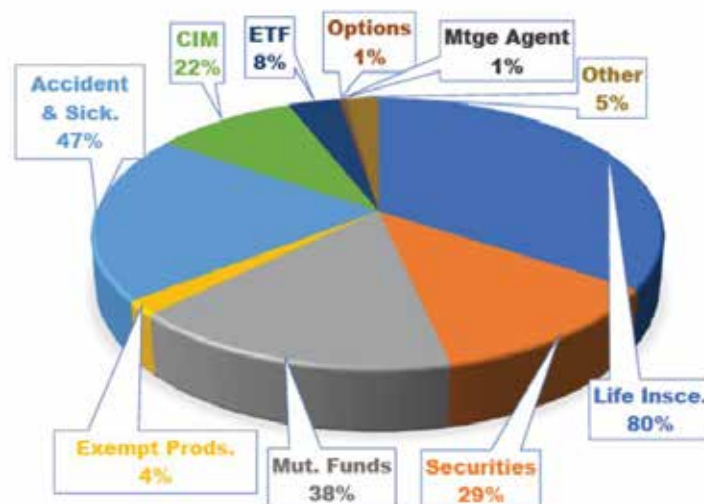
## A NEW OPPORTUNITY: THE DAC AUDIENCE IS UNIQUE AND SPECIALIZED

- A multi-disciplinary audience = new opportunities to present your message and be more referable across multiple industries.
- Highly engaged advisors interested in your brand and value proposition.
- An educational format that positions you as a knowledge expert: this audience will want to learn from you and your message will resonate.
- Your investment has an “educational legacy”; that is, there are multiple ways your brand and message will appear in marketing activities over several months. We will include your profile in Knowledge Bureau Report, on the Knowledge Bureau website and through all our social media efforts. Our media partners will help, too.



## DELEGATE LICENSES HELD BY INDUSTRY

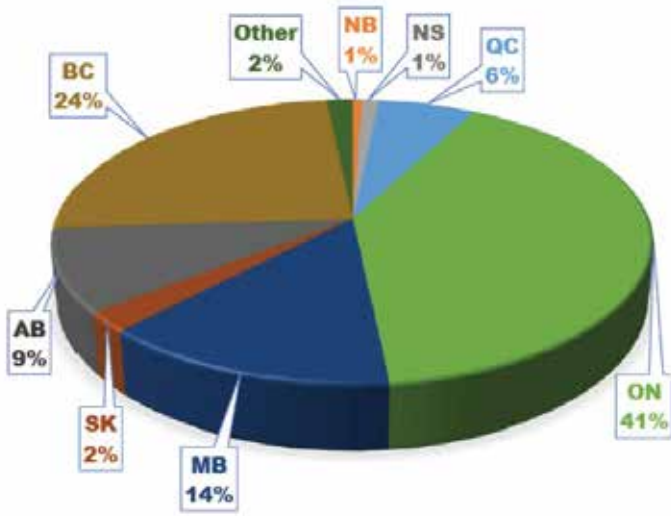
Licences Held\*



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

# DAC DELEGATE INFORMATION

Attendees by Province



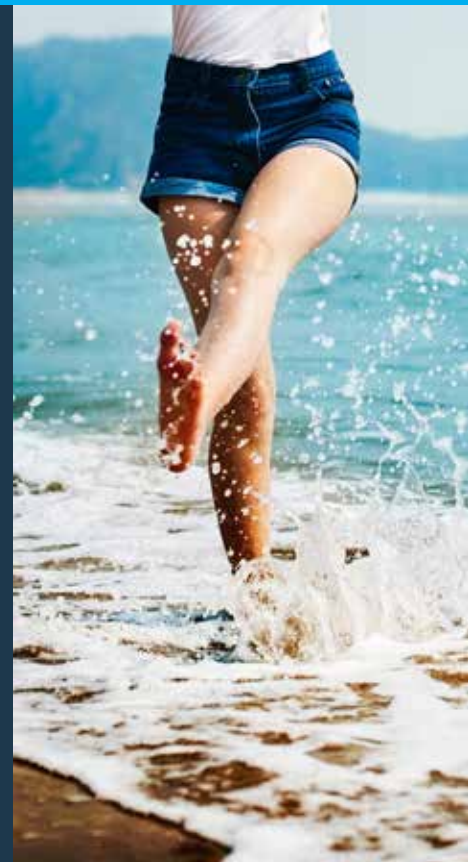
Business Sector\*



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

## 6 MORE GREAT REASONS TO COME TO DAC THIS YEAR!

- Reach senior level decision makers in the tax, accounting, and financial services sector.
- Have access to C-level executives and business owners for 3 full days.
- Take part in Splash - one of our poolside meetings that allow you to meet targeted clients in an informal setting.
- Immerse your brand with a product information page in the journal, table top displays at breakfast and breaks, and by partaking in the networking opportunities, including dine-arounds and offsite activities.
- Utilize your registrations (depending upon sponsorship level) to inspire existing clients with sales initiatives to attend DAC.
- Make the most of your conference time with the DAC Partnership Handbook.





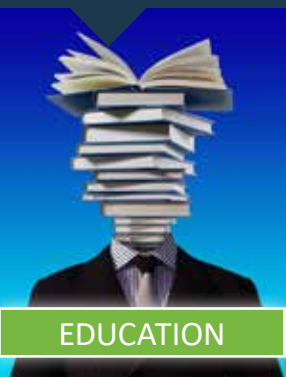
# THEME - POWERFUL COMPETITION: The Secret to Economic Resilience

## DAC 2019 HIGHLIGHTS FOR PARTNERS

- 15 outstanding thought leaders on stage
- 2 vibrant lunch and learn sessions
- 5 incredible networking opportunities



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 16<sup>th</sup> 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:**

|  | Title                            | Platinum                        | Gold                             | Silver                          | Bronze         |
|--|----------------------------------|---------------------------------|----------------------------------|---------------------------------|----------------|
| <b>LEVELS</b> (taxes extra):   | <b>\$29,500</b><br>(1 available) | <b>\$9,500</b><br>(1 available) | <b>\$7,500</b><br>(10 available) | <b>\$5,500</b><br>(4 available) | <b>\$1,500</b> |
| Title sponsor: Gala Reception Co-Host  | X                                |                                 |                                  |                                 |                |
| Lunch and Learn Product Presentation   | X                                | X                               |                                  |                                 |                |
| On Stage Presentation  | X                                | X                               | 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              |
| Newcomer's Reception <b>or</b> Graduate Reception <b>or</b> Mimosa Break Sponsor <b>or</b> Breakfast Sponsor |                                  |                                 |                                  | X                               |                |
| <b>FREE REGISTRATIONS</b>  | <b>4</b>                         | <b>3</b>                        | <b>2</b>                         | <b>1</b>                        |                |

## MAKE A GREAT DECISION TO DO EDUCATION DIFFERENTLY

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

|                      |                                   |                                  |                                  |                                  |                                  |
|----------------------|-----------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| <b>LEVELS:</b>       | <b>Title</b>                      | <b>Platinum</b>                  | <b>Gold</b>                      | <b>Silver</b>                    | <b>Bronze</b>                    |
| (taxes extra)        | <input type="checkbox"/> \$29,500 | <input type="checkbox"/> \$9,500 | <input type="checkbox"/> \$7,500 | <input type="checkbox"/> \$5,500 | <input type="checkbox"/> \$1,500 |
| <b>INVOICE TO:</b>   |                                   |                                  |                                  |                                  |                                  |
| <b>COMPANY NAME:</b> |                                   |                                  |                                  |                                  |                                  |
| <b>FIRST NAME:</b>   |                                   |                                  | <b>LAST NAME:</b>                |                                  |                                  |
| <b>PHONE NUMBER:</b> |                                   |                                  | <b>EMAIL:</b>                    |                                  |                                  |