

SPEAKER PACKET





SPEAKER INFORMATION FORM

Speaker Full Name: _____

Title: _____

Company: _____

Street: _____

City: _____ State: _____

Bio Photo Upload (high-res 300ppi):



Bio Upload (1 paragraph)

Marketing Materials

Session Title: _____

Session Synopsis:

Focus on what an attendee will know or be able to do after they attend your session that they did not know before they attended your session. Where possible, focus on technical, client-facing activities, not on questions of competitive advantage, proprietary products or services, or practice management. 100 words or less, please:

Social Media Requests:



SPEAKER AUDIO/VISUAL FORM

PLEASE READ CAREFULLY

Powerpoint

- Keep presentations strictly technical and educational
- Presentations should not be perceived as sales presentation
- Provide insight on how audience can transfer information to their jobs and organizations
- Please plan for Q&A at the end of your session
- If you make any changes to your presentation, please email the committee chair or IWI staff member prior to the day of the presentation. No changes can be made the day of the event.

AV equipment provided onsite:

- Confidence Monitor
- Speaker Timer
- LCD Projector
- Screen
- Stage and podium
(We encourage presenters to walk around the stage, but not come off the stage)
- Slide Advancer
- Microphone
- Laptop in meeting room
- Water

Powerpoint Presentation

- I have received the IWI PPT template
- My contract states I will be bringing my own laptop/presentation
- My PPT is in 16:9 Aspect Ratio

Microphones

Please check the microphone type you prefer to use.

- Podium Microphone
- Handheld
- Lavalier (lapel)

Special Requests / AV Needs:

SPEAKER TRAVEL AGREEMENT



PLEASE READ CAREFULLY

*Thank you for agreeing to participate in the upcoming **Investments & Wealth Institute Conference**. As a speaker, we will pay for your travel related expenses as outlined below. Once you have reviewed these policies, please complete and sign this form and return to us.*

AIRFARE

Reservations must be made through the Investments & Wealth Institute designated travel agency, Cain Travel, at least 21-days in advance of your travel. If you do not use this travel agency to book your flight, or you purchase your ticket less than 21-days in advance of the date of travel, the Investments & Wealth Institute will reimburse the equivalent of a round-trip coach fare purchased 21-days in advance. Contact Cain Travel at 800-346-4747.

HOTEL

The Investments & Wealth Institute will cover one night lodging within the room block at the contracted conference hotel unless your speaking schedule dictates an additional night. The Investments & Wealth Institute will make your reservation at the conference hotel, unless you indicate that no lodging is needed. The Investments & Wealth Institute will not reimburse for lodging booked outside of the contracted conference hotel. PLEASE LIST HOTEL DATES NEEDED BELOW.

GROUND TRANSPORTATION

The Investments & Wealth Institute will reimburse for ground transportation in your home city as well as the destination city. Please note that only taxi, Lyft, Uber and shuttle service are reimbursable expenses. Airport parking in your home city is also a reimbursable expense. Receipts are required.

MEALS

The Investments & Wealth Institute will cover meals up to \$75 per day. Receipts are required.

***Reimbursement requests must be turned in within 45 days after the speaking engagement**

PLEASE NOTE: THE FOLLOWING WILL BE USED TO MAKE YOUR HOTEL RESERVATIONS

Do you plan on attending the entire conference? Yes No

Do you require hotel accommodations? Yes No

Hotel arrival date: _____ Approx. time: _____

Hotel departure date: _____ Approx. time: _____

SPEAKER TIPS

I&WI Background and Audience

The Investments and Wealth Institute is a not-for-profit member-based organization that credentials financial advisors in three advanced certifications (CIMA, CPWA, and RMA). Since our mission is to provide world-class education to elite investment and wealth management advisors, through a blending of highly academic content and real-life application, we seek presenter content that focuses on technical, academic and innovative concepts. We highly recommend building your presentation around 3-4 primary concepts based on learning objectives, that include real-world application and key takeaways that are immediately applicable to the advisor's role and workplace.

This is a highly academic audience with advanced credentials so speakers who receive highest reviews on surveys typically challenge our audience to think, include technical information and data, tools and resources, and engage with our audience.

Due to the high volume of presentations and expectation for high quality content, it is essential that we receive your presentation materials by the due date provided.

Attire

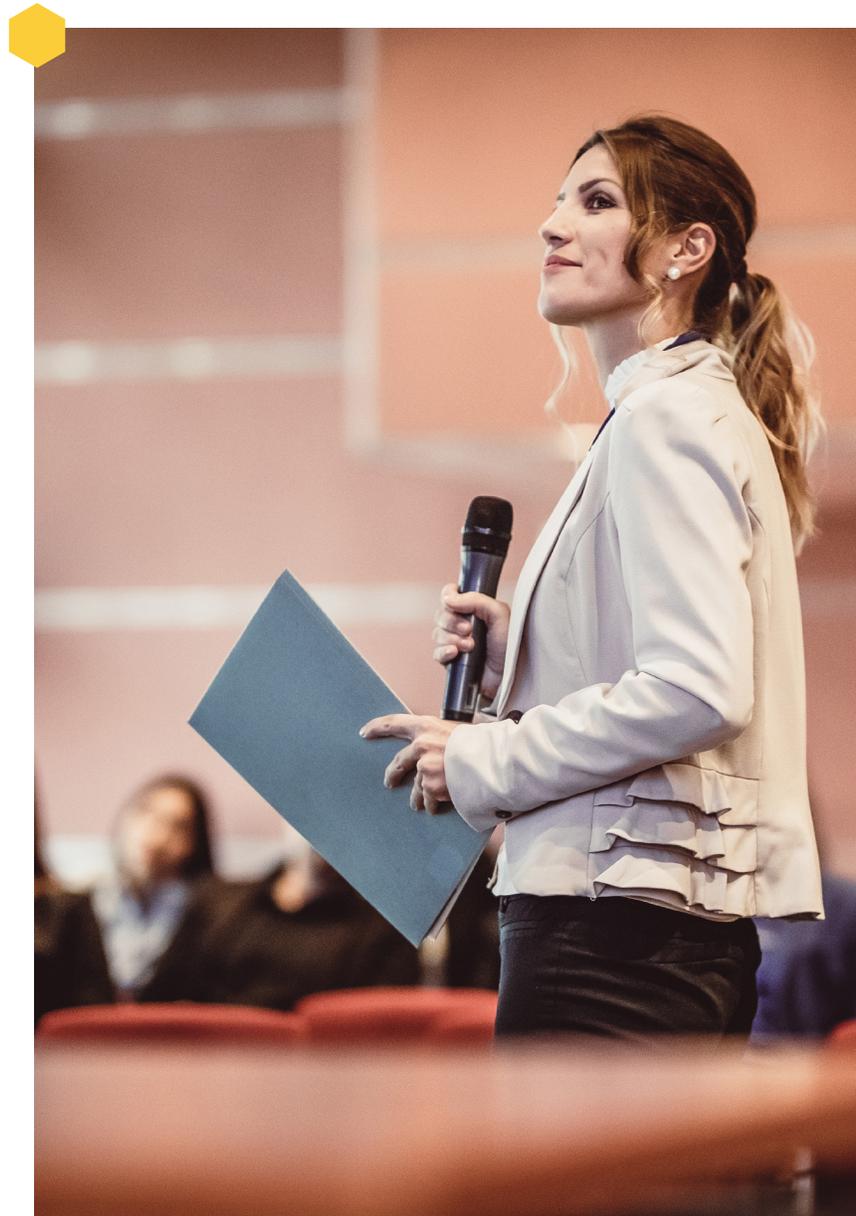
- Please wear business casual attire
- Keep in mind that bright colors and patterns aren't recommended for video recording

Registration and Hotel Accommodations

- IWI Staff will register you for the conference
- Once you fill out the travel form, IWI staff will book your hotel room
- You are responsible for booking your flights/transportation

Session

- An IWI staff member will greet you
- Please arrive 15 minutes prior to your session start time



SPEAKER RELEASE FORM



PERMISSIONS

In an effort to provide Investments & Wealth Institute attendees with the best educational experience possible, the Investments & Wealth Institute requests your permission for the following:

Permission to Voice-Record my Presentation

I grant the Investments & Wealth Institute a royalty-free license to record my presentation. I agree that this recording may be offered for sale at the Institutes discretion to attendees, Investments & Wealth Institute members, and non-members for various uses, including earning continuing education credit. I will retain all other intellectual property and copyright to my presentation.

Permission Granted

Permission Denied

Permission to Post Presentation on Conference Mobile App

I grant Investments & Wealth Institute a royalty-free license to include my presentation (in a locked PDF format) on the conference mobile app as a resource to Investments & Wealth Institute conference attendees and members. I will retain all other intellectual property and copyright to my presentation.

Permission Granted

Permission Denied

I have agreed to make a presentation at an Investments & Wealth Institute Conference. The views and opinions expressed in my presentation will be my own and, therefore, I agree to indemnify and hold Investments & Wealth Institute, its officers, directors, members, employees, and agents harmless against any claim, losses, expenses, or damages which may be incurred by the Investments & Wealth Institute as a result of my presentation.

I represent to the Investments & Wealth Institute that my presentation is an original work and/or that I have the necessary permission to reproduce any of the materials in my presentation; is factually accurate; contains nothing defamatory or otherwise unlawful; that it does not infringe any copyright, statutory or common law or any proprietary rights of any third person; and that I am an independent contractor, not an employee, agent or representative of the Investments & Wealth Institute. I authorize the Institute to use my name, likeness, photograph, and biographical data in connection with the use and promotion of my presentation.

The Investments & Wealth Institute agrees that it will attribute credit to me as appropriate. Both the Investments & Wealth Institute and the presenter agree that this agreement shall be governed by the laws of the State of Colorado.

By signing or typing my name above, I agree to the provisions in this speaker travel agreement.

I have read and agree to the above terms and conditions for travel and expense reimbursements while speaking at the event. Any changes to this travel form must be submitted two weeks prior to the event or we may not be able to accommodate your request.

I agree to the provisions of the speaker release by signing or typing my name above.



**EMAIL FORM TO:
KNEWCOMER@I-W.ORG
OR CLICK "SUBMIT"**

SUBMIT PACKET