



Federation of Independent Dealers  
*Fédération des Courtiers Indépendants*



14TH ANNUAL CONFERENCE • 30TH ANNIVERSARY

# 2026

## ANNUAL CONFERENCE

SPONSORSHIP OPPORTUNITIES

Monday, April 20, 2026

8:30 AM - 6:00 PM

BLG, Suite 3400, Bay Adelaide Centre, East Tower  
22 Adelaide St W, Toronto

**Matthew Latimer**, Executive Director  
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[FederationConference.ca](http://FederationConference.ca)



# SHOWCASE YOUR BRAND

We invite you to join us in commemorating **30 years** of dedicated advocacy for mutual fund and investment dealers across Canada. The Federation of Independent Dealers continues to serve as an important voice for distribution in the industry.

**\$200B+**

ASSETS UNDER ADMINISTRATION

**30,000+**

LICENSED ADVISORS

**Millions**

OF CANADIANS ADVISED

## Why Sponsor?

There is no better way to put your company's strength, commitment, and corporate identity in the spotlight than by sponsoring the Federation's 14th Annual Conference. Connect directly with industry leaders, decision-makers, and key stakeholders in Canada's independent dealer community.

### OUR VISION

To serve as the representative voice of independent dealers across Canada.

### OUR MISSION

To ensure the sustainability and success of independent dealers.

### OUR PURPOSE

To advocate on behalf of our members and provide support through education, awareness, and best practices.

## Celebrating 30 Years (1996-2026)

Founded in 1996 as the Federation of Mutual Fund Dealers, we have spent three decades advocating for the interests of independent dealers. Your participation in our 30th anniversary conference will honour our collective achievements and reaffirm our commitment to excellence in the financial services sector.



# CONFERENCE AGENDA

Monday, April 20, 2026 | BLG, Bay Adelaide Centre, Toronto

TIME	TYPE	SESSION
8:30 AM	OPENING	<i>Registration &amp; Breakfast</i>
9:15 – 10:00 AM	KEYNOTE	<b>Opening Keynote</b> <i>Andrew J. Kriegler, President &amp; CEO, CIRO</i>
10:00 – 11:00 AM	PANEL	<b>Dealer Panel</b> <i>Moderated by Michelle Schriver, Investment Executive</i>
11:00 – 11:15 AM	BREAK	<i>Morning Break</i>
11:15 AM – 12:00 PM	SESSION	<b>Pruning the Rulebook: Canada's Financial Regulatory Scorecard</b> <i>Gherardo Caracciolo, C.D. Howe Institute</i>
12:00 – 1:00 PM	LUNCH	<i>Networking Lunch</i>
1:00 – 1:45 PM	SESSION	<b>Proactive Cybersecurity in the Age of AI</b>
1:45 – 2:15 PM	SESSION	<b>Cracking the Multi-Generational Code</b> <i>Lina Ismail, Prospera AI</i>
2:15 – 3:00 PM	PANEL	<b>Due Diligence Panel</b>
3:00 – 3:15 PM	BREAK	<i>Afternoon Break</i>
3:15 – 4:00 PM	SESSION	<b>IE Dealers Report Card: The Unreleased Research</b> <i>Kevin Press &amp; Katie Keir, Investment Executive</i>
4:00 – 5:00 PM	KEYNOTE	<b>From Compliance to Competitive Advantage: Operationalizing Estate Planning for Advisor Growth</b> <i>Daniel Collison, Advice2Advisors</i>
5:00 PM	RECEPTION	<b>Cocktail Reception</b>



# SPONSORSHIP OPTIONS

<p><b>PREMIUM</b></p> <p>KEYNOTE</p> <p><b>\$7,500</b></p> <p>ONE AVAILABLE</p>	<p><b>PREMIUM</b></p> <p>COCKTAILS</p> <p><b>\$5,000</b></p> <p>ONE AVAILABLE</p>	<p>SESSIONS</p> <p><b>\$4,000</b></p> <p>MULTIPLE AVAILABLE</p>
<p>LUNCH</p> <p><b>\$4,000</b></p> <p>ONE AVAILABLE</p>	<p>BREAKFAST</p> <p><b>\$3,000</b></p> <p>ONE AVAILABLE</p>	<p>AM &amp; PM BREAKS</p> <p><b>\$3,000</b></p> <p>ONE AVAILABLE</p>
<p>CHARGING STATION</p> <p><b>\$2,500</b></p> <p>ONE AVAILABLE</p>	<p>M.C.</p> <p><b>\$2,000</b></p> <p>ONE AVAILABLE</p>	<p>BOOTH</p> <p><b>\$1,500</b></p> <p>LIMITED AVAILABILITY</p>

All sponsorship packages include logo placement on event marketing materials including the Federation website and event communications. We are always open to creative ideas for spotlighting your firm - contact us to discuss alternative options.

## Note to Fund Companies

The Federation has received an exemption to NI 81-105, permitting fund companies to sponsor Federation events.



## PACKAGE DETAILS

FEATURES	BREAKFAST \$3,000	LUNCH \$4,000	COCKTAILS \$5,000	BREAKS \$3,000
Single sponsor exclusivity	✓	✓	✓	✓
MC Acknowledgement	✓	✓	✓	✓
Logo on event marketing	✓	✓	✓	✓
Pop-up banner in room	-	✓	✓	-
Signs at food service	✓	-	-	✓
Booth space	-	✓	✓	-
<b>Event Passes</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>2</b>

FEATURES	SESSIONS \$4,000	KEYNOTE \$7,500	M.C. \$2,000	BOOTH \$1,500	CHARGING \$2,500
Single sponsor exclusivity	-	✓	✓	-	✓
MC Acknowledgement	✓	✓	✓	-	-
Logo on event marketing	✓	✓	✓	✓	✓
Pop-up / Introduce speaker	✓	✓	✓	-	-
Booth space	✓	✓	✓	✓	✓
<b>Event Passes</b>	<b>3</b>	<b>4</b>	<b>4</b>	<b>1</b>	<b>1</b>



# SPONSORSHIP FORM

## FEDERATION CONFERENCE 2026

14th Annual Conference • 30th Anniversary • April 20, 2026

Company Name

Contact Person(s) & Title

Email

Telephone

Website

Select Sponsorship Package(s): (click package name to apply online)

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> <u>Keynote</u> \$7,500  | <input type="checkbox"/> <u>Cocktails</u> \$5,000 | <input type="checkbox"/> <u>Sessions</u> \$4,000 |
| <input type="checkbox"/> <u>Lunch</u> \$4,000    | <input type="checkbox"/> <u>Breakfast</u> \$3,000 | <input type="checkbox"/> <u>Breaks</u> \$3,000   |
| <input type="checkbox"/> <u>Charging</u> \$2,500 | <input type="checkbox"/> <u>M.C.</u> \$2,000      | <input type="checkbox"/> <u>Booth</u> \$1,500    |

Notes to Organizers

Subtotal:  \$ + HST (13%):  \$ = Total:  \$

### Apply Online



Complete your application instantly on our website:

<https://FederationConference.ca/sponsors.html>

### Email This Form



Start an email to the Federation and attach this form:

[mlatimer@independentdealers.ca](mailto:mlatimer@independentdealers.ca)

## Payment Methods

### E-Transfer

Send to:

[Treasurer@IndependentDealers.ca](mailto:Treasurer@IndependentDealers.ca)

### Cheque

**Federation of Independent Dealers**

307-70 Forest Manor Rd.

Toronto, ON M2J 0A9



# SPONSOR LOGISTICS

## Event Passes

Sponsor attendees will have name badges at registration.

**Email attendee names to:**  
mlatimer@IndependentDealers.ca

**Deadline:** April 13, 2026

## Booth Information

Booth includes 1 table + 2 chairs.

**Electricity:** Limited outlets. If your booth requires power, let us know to prioritize placement.

## Shipping Address

**Loading dock:** 37 Richmond St. W  
Borden Ladner Gervais LLP  
Bay Adelaide Centre, East Tower  
22 Adelaide St W, Suite 3400  
Toronto, ON M5H 4E3  
**Contact:** Gregory Taylor (705) 716-2195

## Shipping Timeline

**Delivery deadline:** Thursday, April 17, 2026  
**Post-event:** Arrange your own courier pickup and coordinate with BLG.

## Logos & Branding

Please provide: corporate name, high-res logo (non-PDF), and any usage guidelines.

## Day of Conference

**Setup access:** 7:30 AM  
**Breakfast begins:** 8:30 AM  
Be ready by 8:00 AM.

## Sponsor Prize Draw

Sponsors may provide a prize for guest draws. Winners announced during closing remarks.



# *Thank You*

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