



2017 National Conference & AGM

June 6th – 8th, 2017

SPONSORSHIP PACKAGE



253 Taylor Road
Niagara-on-the-Lake, ON
L0S 1J0

To reserve your room, simply call reservations at 1-800-263-5766 and advise the agent of the name of our group.



CAILBA is pleased to provide you with the 2017 National Conference & AGM Sponsor Information Guide, offering you a complete list of sponsor opportunities.

Event registration will begin January 2017.

CAILBA Contact Information

Email: info@CAILBA.com

Telephone: 416-548-4223

Website: www.CAILBA.com

The **Canadian Association of Independent Life Brokerage Agencies (CAILBA)** will hold its National Conference and Annual General Meeting at White Oaks Resort, Niagara-on-the-Lake from June 6th to 8th 2017.

We attracted almost 200 attendees across Canada in 2016, representing the life insurance companies and MGA firms across Canada as well as Industry Vendors and Partners. This is a fantastic opportunity to strengthen existing relationships and meet new potential partners for your business. A very informative lineup of speakers and distinguished list of panelists that will be sure to make this an event you won't want to miss.

The Canadian Association of Independent Life Brokerage Agencies (CAILBA) is the single voice for the Managing General Agencies (MGA) across Canada. We are a National industry association that work alongside our members to stay abreast of change and effectively implement compliance and regulatory updates.

The National Conference and Annual Meeting has become an integral part of our association, where our members come together face to face to discuss new issues, trends, and outlook relevant to the MGA business. Our Annual Meeting is not only open to our existing members, but also to any financial services industry organization that is interested in learning more about CAILBA while demonstrating support for the MGA distribution channel.

Networking opportunities are an essential aspect of our meeting and much of this networking will take place at our Sponsors Tradeshow. The Sponsors Tradeshow will highlight all of our sponsors, showcasing sponsors' products and services, in an intimate and engaging setting.

The Sponsors Tradeshow will be open during the Welcome Reception on Tuesday, June 6th and Cocktail Reception on June 7th and during all refreshment breaks over the course of the Conference. Please note, there are a limited number of spots available at the Sponsors Tradeshow, which will be assigned on a first come first serve basis.

Sponsorship, Registration, Membership: Fees and Requirements

Registration will open in January 2017. Complimentary passes and discount pricing are offered to sponsors. Please refer to the section below for more information.

Please note that **only member companies** are given the opportunity to sponsor this event. **Only CAILBA members** may register for the event. This year we introduce a new membership category to CAILBA extending reach to **Industry Affiliates** that have

demonstrated interest in supporting this event. For more information, please visit our site for [membership fees](#).

Non-member insurance companies who wish to attend the 2017 National Conference & AGM must become a member company and then register at our member rate of \$349/\$399 CDN (early bird/regular) per registrant.

Non-member vendor/service provider companies who wish to sponsor or attend the 2017 National Conference & AGM must become a member under the new membership category “Industry Affiliate” (\$2,500 annual fee) and then register for the conference as a CAILBA member or sponsor under the “Industry Affiliate Sponsor” option. Please contact CAILBA Executive Director, Clementine Peacock, if you have any questions.

<i>Summary of Membership, Sponsorship, and Registration Fees:</i>				
For CAILBA Members	MGA	Life Insurance Company/Supplier	Industry Vendor/Service Provider	Industry Affiliate
CAILBA Annual Membership	\$2,500	\$3,125	\$3,125	\$2,500
Sponsorship Fee	N/A	\$13,500	\$6,500	\$3,000
Conference Registration (Early Bird/Post Early Bird)	\$349/\$399	\$349/\$399	\$349/\$399	\$349/\$399

**HST to be added to the above fees*

Sponsorship Opportunities

CAILBA offers three categories of sponsorship:

1. *Life Insurance Companies/Suppliers*
2. *Industry Vendors/Service Providers*
3. *Industry Affiliate Sponsor*

1. Life Insurance Companies/Suppliers \$13,500

Sponsorship benefits include:

- Acknowledgement in onsite program and online program
- Acknowledgement in Welcome Reception
- Additional and enhanced signage during the conference and acknowledgement from mainstage podium
- One designated space inclusive of 6’ exhibitor table and Wi-Fi access at The Sponsors Lounge – floor plan included with package

- Access to pre-conference registration rosters 15 days prior to the conference
- Registration for 2 representatives to attend the CAILBA Annual Meeting – additional passes can be purchased at a special rate of \$349

2. Industry Vendors/Service Providers \$6,500

Sponsorship benefits include:

- Acknowledgement in onsite program and online program
- Acknowledgement in Welcome Reception
- Additional and enhanced signage during the conference and acknowledgement from mainstage podium
- One designated space inclusive of 6' exhibitor table and Wi-Fi access at The Sponsors Lounge – floor plan included with package
- Access to pre-conference registration rosters 7 days prior to the conference
- Registration for 1 representative to attend the CAILBA Annual Meeting – additional passes can be purchased at a special rate of \$349

3. Industry Affiliate Sponsor \$3,000

Recognized as an industry non-profit/association or regulatory body. Or, an affiliate Financial Institution to an existing Carrier Member, or Financial Institution offering other products or services to MGAs.

Sponsorship benefits include:

- Acknowledgement in onsite program and online program
- Acknowledgement in Welcome Reception
- Additional and enhanced signage during the conference and acknowledgement from mainstage podium
- One designated space inclusive of 6' exhibitor table and Wi-Fi access at The Sponsors Lounge – floor plan included with package
- Access to pre-conference registration rosters 7 days prior to the conference
- Registration for 1 representative to attend the CAILBA Annual Meeting – additional passes can be purchased at a special rate of \$349

Sponsorship Application and Contract

Please complete and return all 6 pages of this form to info@CAILBA.com

Attention: Clementine Peacock, Executive Director

By completing and submitting this Contract, you are making a formal application for sponsorship which will become binding upon confirmation from CAILBA. The contract is the person who will receive all mailings, emails, attendee lists, etc., as well as The Sponsors Lounge logistic information.

Company Name: _____

If your company has multiple divisions participating, please complete a separate Contract for each division.

Main Contact: _____

Email Address: _____

Phone: _____

Street Address: _____

City: _____

Province: _____

Postal Code: _____

Website: _____

Sponsorship Application and Contract

Company: _____

**Please complete and return all 6 pages of this form to info@CAILBA.com.
Attention: Clementine Peacock, Executive Director**

Please complete the following questions:

- Yes No We give permission to provide a link from the CAILBA website to our company website.
- Yes No We wish to have our company appear as a sponsor on the CAILBA website and all other applicable print and digital materials.
- Yes No We wish to utilize designated space at The Sponsor Lounge included with our Sponsorship.

Please indicate your preferred table assignment based on floor plans attached:

Choice 1: _____ Choice 2: _____ Choice 3: _____

Payment Information

Sponsorships are only offered to CAILBA member companies.

Sponsorship Category:	Cost	Qty	Total
Life Insurance Companies/Supplier	\$13,500	()	\$
Industry Vendor/Service Provider	\$ 6,500	()	\$
Industry Affiliate Sponsor	\$ 3,000	()	\$

New Members: Invoice me separately for annual membership fees and conference sponsorship Yes

**HST/GST will be added to this fee and will be shown on your invoice as a separate entry*

General Comments:

Sponsorship Application and Contract

Company: _____

Please complete and return all 6 pages of this form to info@CAILBA.com.

Attention: Clementine Peacock, Executive Director

Information and Regulations

1. *Contract to Sponsor*

The receipt by CAILBA of a signed Sponsor Contract with the appropriate fee will constitute a binding contract. CAILBA reserves the right to reject any Contract for any reason. If any Sponsor changes management or is purchased by another company, this Agreement becomes binding on such company.

2. *Cancellation*

In the unlikely event CAILBA cancels the Annual Meeting, all Contract fees will be refunded. Should a company need to cancel, the cancellation policy is as follows:

If Cancellation is:

- More than 120 days out, 75% monies paid will be refunded.
- Less than 120 days out, but still more than 60 days out, 50% of monies paid will be refunded.
- Less than 60 days out, but more than 30 days out, 25% of monies paid will be refunded.
- Less than 30 days out, no refund will be issued.

3. *Shipping and Receiving*

Shipment of packages to White Oaks Resort, Niagara-on-the-Lake should be addressed as follows and arrive no earlier than 3 days prior to the event:

ORGANIZATION NAME & CONTACT NAME

White Oaks Resort

Shipping and Receiving Dept.

Attention: Ashley Racine, Conference Services Manager

253 Taylor Road, SS4

Niagara-on-the-Lake, ON

LOS 1J0

HOLD FOR ARRIVAL

FUNCTION DATE: June 6,7,8

FUNCTION ROOM is the Gardenview Foyer

BOX _____ OF _____ (multiple boxes must be numbered)

Name of Conference Service Manager: Ashley Racine, Tel: (905) 704-5612

Sponsorship Application and Contract

Company: _____

**Please complete and return all 6 pages of this form to info@CAILBA.com.
Attention: Clementine Peacock, Executive Director**

The Hotel receiving dock operates Monday to Friday, 7:30 AM – 3:00 PM EST. For deliveries outside of these hours, please notify Conference Service Manager (Ashley Racine) so suitable arrangements can be made. An additional service is available if needed for unloading trucks and taking packages to storage space or the designated function rooms. Should the Hotel be required to move such items from the loading dock, arrangements must be made at a labour charge of \$50 per hour, per person (minimum of 4 hours, per person).

Neither CAILBA nor the Hotel will be responsible for any damages or loss of any articles left in the Hotel, prior to, during or following any function by the Sponsor or his/her guests. In addition, the Hotel is not responsible for packing or for supplying any packaging materials. Any materials left behind without shipping instructions will be discarded three business days after your departure date. After the event, any boxes to be shipped out of the hotel must be properly packaged and labeled with the shipping address, return address and method of payment on your departure date.

4. *Installation and Dismantling*

Setup of The Sponsors Lounge occurs on Tuesday, June 6th, 2017 from 2:00 PM – 4:00 PM EST prior to the Welcome Reception. All setup must be assembled, staffed and operational by 5:00 PM EST on Tuesday, June 6th, 2017. Sponsors may begin to dismantle their setup on Thursday, June 8th, 2017 after 11:00 AM EST. Dismantling of booths must be completed by 2:00 PM EST on Thursday, June 8th, 2017. No setups shall be packed, removed, or dismantled prior to the closing of the CAILBA Annual Meeting without written permission to the CAILBA Management. Please note, setup times may be subject to change. CAILBA will inform you directly for any changes at least 30 days in advance of the event date.

Sponsorship Application and Contract

Company: _____

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Attention: Clementine Peacock, Executive Director

5. *Signage and Display*

Sponsor is responsible for providing signage and display materials for use in its designated space. A skirted, standard banquet table, access to standard electric outlet, and wireless internet access will be provided to the Sponsor. Any additional display, AV, and electrical needs will be the Sponsor's responsibility.

Please arrange directly with the Conference AV provider:

Excellence Events:

Jeff MacInnis

jeff@excellenceevents.com

416-230-6101

6. *Sponsor Operation and Conduct/Right of Entry and Inspection*

Sponsors may schedule private functions or meetings as long as it does not conflict with officially scheduled CAILBA events during the conference dates of June 6th – June 8th, 2017. Please contact CAILBA Executive Director, Clementine Peacock, to make arrangements with the Hotel and to ensure private functions are appropriate.

7. *Fire Regulations*

All applicable fire laws must be strictly observed. Wiring must comply with local fire department and underwriters' rules. Aisles, fire exits and fire protection equipment must not be blocked by Sponsors. Decorations and displays must either be of nonflammable material or must be treated for fire prevention by an approved method.

Sponsorship Application and Contract

Company: _____

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Attention: Clementine Peacock, Executive Director

8. *Liability and Insurance*

This Agreement shall not constitute or be considered a partnership, employer-employee relationship, joint venture or agency between CAILBA and Sponsor. The Sponsor hereby agrees to and does indemnify, hold harmless, and defend CAILBA, its officers, directors, employees, agents, affiliates, and subsidiaries from and against any and all liability, responsibility, loss, damage, cost, or expense of any kind whatsoever (including but not limited to cost, interest and attorney's fees) which any Indemnified Party may incur, suffer, be put to, pay or be required to pay, incident to or arising directly or indirectly from any act or omission by Sponsor or any of its employees, servants, or agents. The Sponsor further agree that the Indemnified Party shall not be responsible in any way for damage, loss or destruction of any property of Sponsor or injury to Sponsor or its representatives, agents, employees, licensees, or invitees. The Sponsor agrees to obtain Commercial General Liability and Property insurance to be in effect during the the dates of The Sponsors Lounge, including move-in and move-out days, and shall furnish a certificate of insurance to CAILBA if requested. Said limits of insurance shall be in an amount not less than \$1 million per occurrence and \$2 million in the aggregate. The Sponsor agrees to waive the right of subrogation by their insurance carriers to recover loss sustained under the respective insurance contracts for real and personal property.

9. *Security*

CAILBA will not be providing security service for the Sponsors Tradeshow.

Signature of Contact: _____

Name of Contact: _____

By signing, I indicate I have read and will abide by the above Regulations.