

## INSIGHTS 2015 Speaker Proposal Form

fi360 is seeking qualified candidates to present as breakout speakers at [INSIGHTS 2015](#), our annual, national professional development conference. To be considered as a speaker, please complete and submit the attached proposal form to [conference@fi360.com](mailto:conference@fi360.com).

### PROPOSAL REQUIREMENTS:

- All sessions should somehow fit within fi360's mission of helping advisors make better investment and business decisions.
- We seek to provide a broad spectrum of choices for breakout sessions, covering a wide variety of topics and for all skill and experience levels. Some selected sessions will have mass appeal and some will be niche, so propose the topic that you know best.
- The most valued quality we look for in a proposal is that we can easily recognize any practical takeaways that attendees can expect from your session based on its description.
- Multiple session proposals are permitted.
- Additional attachments are permitted.

### SPEAKER REQUIREMENTS:

Speakers must sign the Speaker Agreement and Release form attached agreeing that:

- You will meet deadlines for providing information and materials, such as speaker biographies and photos, session title and description, and draft slides and materials
- You consent for fi360 to publicize your involvement with the conference, distribute handouts, and to record your presentation for specified uses
- Your presentation and materials are your original work and/or you have legal rights to use them.

### SESSION REQUIREMENTS:

- Sessions must have educational and/or practical value that is not dependent on purchasing a particular product or service. Sessions must not be sales pitches.
- All sessions are scheduled for one hour and must last at least 50 minutes due to CE requirements.
- Session rooms are equipped with a laptop to run slides, microphones and speakers, projector and screen, and a remote clicker to advance slides. Our ability to provide additional support will be dependent on cost and availability.

Contact: If you have any questions, please contact fi360 at [conference@fi360.com](mailto:conference@fi360.com).

Thank you for your interest in presenting at the fi360 Conference.

# fi360 Conference Speaker Proposal Form

If you are interested in speaking at the annual fi360 Conference, please complete this form and the attached Conference Speaker Agreement and Release, and email them to [conference@fi360.com](mailto:conference@fi360.com).

All fields are not required; our evaluation will be based on the information provided. If you wish to propose multiple sessions, fill out a "Session details" form for each session. If you have online information regarding your speaking credentials or topic descriptions, please insert the URL in the "Session Description" field.

SPEAKER CONTACT INFORMATION					
Name:					
Professional Credentials:					
Title:					
Company:					
Website:					
Address 1:					
Address 2:					
City:		State:		Zip Code:	
Telephone:					
Email:					
PRIMARY POINT OF CONTACT, IF DIFFERENT THAN ABOVE					
First Name:					
Last Name:					
Email:					
Telephone:					

## Proposed Session Details

<b>Title</b>			
<b>Description</b>			
<b>List names of proposed co-presenters (if applicable)</b>			
<b>Sophistication level of presentation</b>	___ Basic	___ Intermediate	___ Advanced
<b>Learning objectives:</b> What will participants be able to do following the presentation?			
<b>General subject areas:</b> List the keywords you would associate with this presentation, i.e., is it for retirement advisors or advisors who work with high net worth clients or trusts?, regarding a specific type of investment product?, address a specific part of the investment management process?, etc.			
<b>Speaker Bio(s):</b> Enter a brief biographical description for each proposed speaker that demonstrates professional qualifications, expertise on the subject matter, and/or speaking experience. This may be submitted separately in the form of an attachment.			

If you have any questions, please contact us at [conference@fi360.com](mailto:conference@fi360.com).



**CONFERENCE SPEAKER  
AGREEMENT AND RELEASE FORM**

If selected as a speaker, contributor or presenter as fi360's INSIGHTS 2015 Conference ("Conference"), I agree to the following:

1. **License Granted.** I hereby grant a limited non-exclusive license of the copyright ownership rights to my Conference presentation and materials, both written and electronic, to fi360, Inc. ("fi360").
2. **Limited Use.** It is expressly understood and agreed that the presentation is for use as a contribution to Conference and that this work may be reproduced by fi360 for the following purposes:
  - a. Material distributed to conference attendees in paper and/or electronic format
  - b. On-screen at the conference and then subsequently made available on-demand or stored in fi360's archives
  - c. Online and in-person access for conference attendees and fi360 clients or employees to view or print read-only PDF versions of the presentation
  - d. Audio and/or video recording of presentation and materials for fi360 website and other promotional, educational, and commercial purposes as determined by fi360
3. **Approval for Use of Image.** I also grant fi360 the right to reproduce, print, publish, broadcast or otherwise disseminate my name, likeness, photograph, voice, other recognizable likeness and biographical material for purposes of promoting or producing the trade or advertising.
4. **Warranties, Indemnity and Non-Defamatory.** I warrant that the presentation is my original work, or my original work in collaboration with other author(s), and does not infringe upon the intellectual rights of any third party. I further warrant that I have the right to license the presentation. Further, I attest that I will not make any disparaging or defamatory statements during my presentation. Finally, I agree to defend and indemnify fi360 from any claims that arise from a breach of this agreement.
5. **Instructional and NonDefamatory Purpose.** I acknowledge that the purpose of the INSIGHTS conference is instructional and that I will not use my speaker session for promotional or sales purposes. I further agree that I will provide instructional material for at least fifty (50) minutes of each hour scheduled for my presentation which will enable continuing education (CE) sessions to be granted. I further attest that I will not make defamatory statements make any statements that may cause the subject
6. **No Recordings.** I also agree not to make, transmit, or aid in the transmitting of any unauthorized audio or video recordings of the conference without prior written consent of fi360.

I hereby agree to cooperate with fi360 in order to enforce and carry out the intent of this agreement and release.

\_\_\_\_\_  
Print name

\_\_\_\_\_  
Date

**Return to:** [conference@fi360.com](mailto:conference@fi360.com)