

2018 Fi360 Conference Speaker Proposal Form

Fi360 is seeking qualified candidates to present as breakout speakers at the 2018 Fi360 Conference, our annual, national professional development conference. To be considered as a speaker, please complete and submit the attached proposal form to conference@fi360.com.

PROPOSAL REQUIREMENTS:

- All sessions should fit within Fi360's mission of helping advisors make better investment decisions, understand the fiduciary process, adopt better practices, and grow their business.
- 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 broad 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.

ABOUT THE SELECTION PROCESS:

- Speaker selection is done by a committee comprised of Fi360 staff and potentially outside advisors.
- Factors considered include the quality and substance of the topic being proposed, the credentials of the speaker(s), how the proposal compares to other proposals regarding a similar topic, whether the proposal includes a practical element, timeliness of the topic, whether the topic has been sufficiently covered at a recent Fi360 conference, etc.
- Notifications of acceptance or rejection will primarily be delivered during the month of October.

SPEAKER BENEFITS:

- All speakers will receive complimentary registration to all conference activities and a guest pass to social events.
- Additional compensation or reimbursement is typically not provided, but can be decided on a case-by-case basis.

Contact: If you have any questions, please contact Fi360 at 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.

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

Title			
Description			
List names of proposed co-presenters (if applicable)			
Sophistication level of presentation	___Basic	___Intermediate	___Advanced
Learning objectives: What will participants be able to do following the presentation?			
General subject areas: Help us understand who the presentation is for and the subject matter topics to be discussed.			
Speaker Bio(s): 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. Additional attachments may be submitted.

**CONFERENCE SPEAKER
AGREEMENT AND RELEASE FORM**

If selected as a speaker, contributor or presenter at the 2018 Fi360 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 live presentation and materials (“Materials”), both written and electronic, to Fi360, Inc. (“Fi360”).
2. **Limited Use.** It is expressly understood and agreed that the Materials are for use as a contribution to a Conference and that the Materials may be reproduced by Fi360 for the following purposes:
 - a. 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, employees or agents to view or print read-only PDF versions of the Materials
 - d. Audio and/or video recording of 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 Conference and related events or activities.
4. **Warranties and Indemnities.** I warrant that the Materials are my original work, or my original work in collaboration with other author(s) for which I have permission to grant the rights herein, and the Materials do not infringe upon the intellectual rights of any third party. I further warrant that I have the right to license the Materials to Fi360 and have obtained permissions, if required, from my employer or franchisor. 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 my breach of this Agreement.
5. **Instructional Purpose.** I acknowledge that the purpose of the Conference is instructional and that I will not use my speaker session for promotional or sales purposes. I further agree that I will provide an instructional presentation and supporting material for at least fifty (50) minutes of each hour that I am scheduled in order to ensure continuing education (CE) sessions credit can be granted to attendees.
6. **No Recordings.** I also agree not to make, transmit, or aid in the transmission 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.

Signature

Printed Name

Date

Return to: conference@fi360.com