2027 Sponsorship Prospectus

Conference & AGM, Ottawa ON
May 2-5, 2027

The Westin Ottawa

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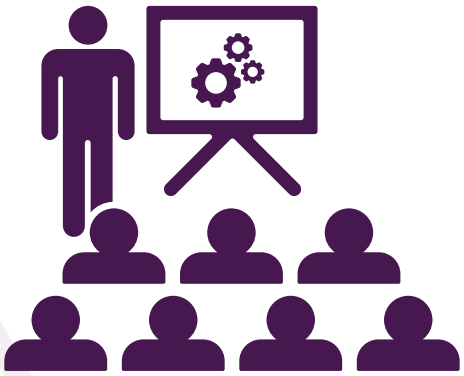
About CALU

The Conference for Advanced Life Underwriting (CALU) is Canada's professional association for leaders in the life insurance and financial advisory industry. We provide our 650+ members with high-quality education and with opportunities to connect, stay informed and share ideas on how to enhance the financial well-being of individual Canadians and businesses. Advocacy is an important part of our mandate.

Our membership includes:

- Members and Provisional Members — over 450 individuals licensed to sell life insurance and provide services related to life insurance, wealth management, and living and employee benefits directly to clients. Many of these individuals are small business owners.
- Associate Members — over 200 individuals actively engaged in employment, business or a profession which is substantially related to advanced life underwriting in a role supporting the industry or advisor(s). Many of these members are accountants, lawyers, actuaries and other professionals who support advisors in the complex discipline of advanced advisory services.



2027 Conference & AGM

Join our Annual Conference & AGM at The Westin Ottawa to hear from some of Canada's leading industry, business and political experts. The event, now in its 34th year, attracts **500 +** leaders in the life insurance and financial advisory industry from across Canada.

Highlights include:

- Technical sessions in advanced planning in life insurance and related specialized areas
- Presentations from acclaimed keynote speakers (recent speakers include Jean Charest and Chris Hadfield)
- Key developments in income tax and estate planning
- Analysis of the current Canadian political landscape and influences shaping legislative agendas
- Association updates on priorities and initiatives
- Networking opportunities

Why Sponsor?

By sponsoring[1] CALU's 2027 Conference & AGM, you will have the opportunity to:

- Showcase your product, service and brand before those who serve the high-net-worth market
- Network with leaders in advanced life underwriting and financial advisory services from across Canada
- Learn emerging industry trends and developments
- Strengthen your reputation by supporting a trusted professional community

1) Subject to eligibility requirements.

Sponsor Benefits

All sponsor investments will allow you to reach your audience through:

- One complimentary registration to the four-day event[2]
- Dedicated tabletop space for three days (May 3-5) in a high traffic area with the ability to display corporate signage/banner and provide branded collateral[3]
- Lead capture license to obtain contact information from individuals who provide express consent at the event[4]
- Sponsor logo, description and website link on CALU Conference & AGM website
- Sponsor logo, description and website link on event app available to 500+ participants
- Logo display on slide show before all participants in plenary sessions
- Recognition on signage at the event
- Recognition in weekly email newsletter to all CALU members before and after the event
- Recognition on CALU social media channels (LinkedIn, X) surrounding the event
- Ability to purchase additional four-day event passes at a discounted rate of $1,250[5]

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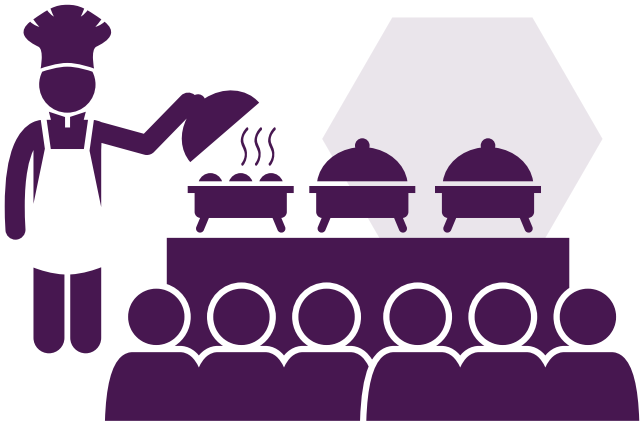
2)Includes all meals and refreshment breaks and access to mainstage sessions from May 2-5. Does not include access to concurrent sessions and the ability to earn Continuing Education (CE) credits.

3) Tabletop displays are 8' X 5' and contain a 6' X 2.5' draped table with one or two chairs and electrical power. Location determined by CALU. Additional furnishings can be provided at additional cost.

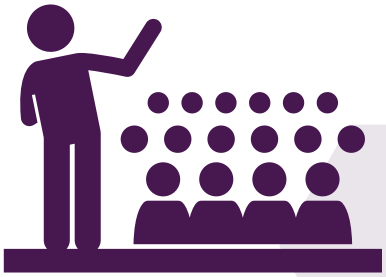
4) Sponsors responsible for obtaining express consent and contact information directly from participants. CALU does not provide participant contact information as part of any sponsorship package.

5) Subject to availability and at CALU's discretion.



Sunday Night Opening Banquet Sponsor (x1) $20,000

- One additional complimentary pass to the four-day event
- Opportunity to deliver verbal welcoming remarks at Banquet (up to one minute and subject to approval by CALU)
- Dedicated signage at the Banquet (to be produced by CALU using sponsor logo)
- Logo on screens displayed on main stage during the dinner service
- Logo included on the menu at each place setting
- Recognition by event emcee as Banquet sponsor before all participants



Keynote Presentation Sponsor (x2) $15,000

- One additional complimentary pass to the four-day event
- Opportunity to deliver verbal remarks prior to a keynote speaker presentation on May 3 (up to one minute and subject to approval by CALU)
- Recognition by event emcee as keynote sponsor before all participants

Sunday night receptions sponsor (x1) $12,500

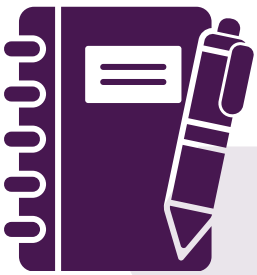
- One additional complimentary pass to the four-day event
- Dedicated signage during First Timers' Reception and Opening Reception (to be produced by CALU using sponsor logo)

Monday night reception sponsor (x1) $12,500

- One additional complimentary pass to the four-day event
- Dedicated signage during reception (to be produced by CALU using sponsor logo)

Lunch Sponsor (x2) $12,500

- One additional complimentary pass to the four-day event
- Logo on screens displayed on the main stage during a lunch (May 3 or 4)
- Recognition by event emcee as lunch sponsor before all participants



Notebook Sponsor (x1) $12,500

- One additional complimentary pass to the four-day event
- Logo on cover of notebook provided to 500+ participants (to be produced by CALU using sponsor logo)

Lanyard Sponsor (x1) $12,500

- One additional complimentary pass to the four-day event
- Logo on event lanyard visible to 500+ participants (to be produced by CALU using sponsor logo)

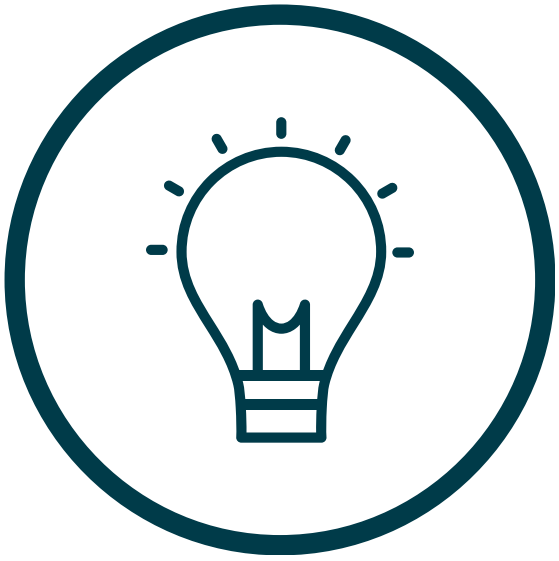
Hotel Keycard Sponsor (x1) $10,000

- Logo on The Westin Ottawa hotel key cards provided to hundreds of participants

Break Sponsor (x5) $7,500 per break

- Dedicated signage during breaks on May 3-5 (to be produced by CALU using sponsor logo)

Additional event passes may be available for purchase subject to availability and at CALU's discretion.



Other ideas to help showcase your brand with our audience? We are happy to work with you to customize a package that meets your needs!

Please contact us at calu@calu.com or (613) 505-9632 ext. 0 for additional information about these sponsorship opportunities.