

15th Annual Financial Literacy Leadership Conference

**Financial Wellness:
Agility & Sustainability**

**and
25th Anniversary Celebration**



**GAYLORD NATIONAL RESORT
NATIONAL HARBOR, MARYLAND**

OCTOBER 23-24, 2023

SFE**PD**

SOCIETY FOR FINANCIAL EDUCATION
& PROFESSIONAL DEVELOPMENT

ABOUT SFE PD

The Society for Financial Education and Professional Development (SFE PD) has a proven track record as a national leader in the financial literacy field in the United States. Established in 1998, SFE PD is one of the first educational nonprofits to deliver customized financial literacy programs and professional development opportunities for financial educators nationwide.

Our mission is to enhance financial and economic literacy and to promote the professional development of individuals in underserved communities.



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15th Annual Financial Literacy Leadership Conference

Financial Wellness: Agility & Sustainability

SFEPD's Annual Financial Literacy Leadership Conference is the destination for financial educators, federal and state policymakers, researchers, nonprofits, colleges and universities, students, and consumers to advocate for and enhance the financial literacy of Americans of all ages and backgrounds. Our top-rated conferences include organizations and individuals from across the nation and overseas. This year, we are featuring dynamic speakers and workshops with the theme "Financial Wellness: Agility & Sustainability."

Demonstrate your commitment to increasing the financial literacy of Americans while showcasing your financial education products and services by serving as a conference sponsor. Platinum, Gold, Silver, and Bronze sponsorship levels are available. Opportunities also include sponsoring a specific break, luncheon or serving as the title sponsor for the 25th Anniversary Celebration.

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15th Annual Financial Literacy Leadership Conference

Financial Wellness: Agility & Sustainability

SFEPD's Financial Wellness: Agility & Sustainability conference will feature keynote and luncheon speakers, and three concurrent workshops each day. We will also have an exhibit hall for participants to network with sponsors and other attendees. SFEPD's 25th Anniversary Celebration will take place the evening of October 23.

A brief sampling of workshop topics include:

- Digital Inequities: Its Impact on Financial Wellness
- Cultural Relevancy in Financial Education
- Psychology of Money
- Understanding the Economic Ecosystem
- Making Money Moves
- Media Coverage of Financial Education
- Retirement: Myths & Opportunities
- Financial Technology Trends & Tips
- Student Ambassadors In Action
- Global Financial Literacy Talk with Ted Daniels

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CONFERENCE SPONSORSHIP LEVELS

Platinum

- Conference Registrations: 10
- Platinum sponsor recognition on social media, SFEPD website and conference outreach
- Digital ads during conference
- Recognition in conference app and printed program
- Opportunity to share short video ad on app and during joint session
- Recognition in pre-conference communications and opening remarks
- Recognition as sponsor in SFEPD quarterly newsletter
- Exhibitor table/booth
- Nametag recognition for company representatives in attendance
- Opportunity to frame and develop workshop, including choice of facilitators and materials distributed to attendees

\$30,000

Gold

- Conference Registrations: 8
- Gold sponsor recognition on social media, SFEPD website and conference outreach
- Digital ads during conference
- Recognition in conference app and printed program
- Opportunity to share short video ad on app and during joint session
- Recognition in pre-conference communications and opening remarks
- Recognition as sponsor in SFEPD quarterly newsletter
- Exhibitor table/booth
- Nametag recognition for company representatives in attendance

\$20,000

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CONFERENCE SPONSORSHIP LEVELS

Silver

- Conference Registrations: 6
- Silver sponsor recognition on social media, SFEPD website and conference outreach
- Digital ads during conference
- Recognition in conference app and printed program
- Recognition in pre-conference communications and opening remarks
- Recognition as sponsor in SFEPD quarterly newsletter
- Exhibitor table/booth
- Nametag recognition for company representatives in attendance

\$10,000

Bronze

- Conference Registrations: 4
- Bronze sponsor recognition on social media, SFEPD website and conference outreach
- Digital ads during conference
- Recognition in conference app and printed program
- Recognition in pre-conference communications and opening remarks
- Recognition as sponsor in SFEPD quarterly newsletter
- Exhibitor table/booth
- Nametag recognition for company representatives in attendance

\$5,000

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25TH ANNIVERSARY CELEBRATION

SFEPD will celebrate our 25th Anniversary the first evening of the conference on Monday, October 23rd with a special evening honoring our past, present and bright future. The evening will kick off with a cocktail hour to the sounds of a smooth jazz ensemble and then flow to a celebration banquet. The banquet will feature our leadership, partners, friends, students and alumni who have contributed to the success of SFEPD from the early days until the present. The annual SFEPD awards will be presented during this interactive, multi-media program, which will feature a dynamic keynote speaker and special guests.



Sponsorship is available for the presenting sponsor of the 25th Anniversary Celebration for **\$30,000**, including exclusive naming rights for the event.

Sponsorship includes logo on pre-event publicity, including on marketing materials, conference program, SFEPD website and eblasts, and tagging on social media. Additionally, there will be an opportunity to have a representative from your organization as part of the program.

COLLEGE FINANCIAL LITERACY BOWL

In celebration of our 25th Anniversary as an organization and our 15th Annual Conference, SFE PD is launching a new event for 2023. Teams of four students from our HBCU Student Ambassador Programs will compete in a Financial Literacy Bowl competition.

Initially open to all SFE PD Ambassador programs, teams from each participating HBCU will compete in a two-phased competition to see who is the most financially savvy. The first round of the competition will be held virtually and teams will compete in a speed round of financial literacy questions. The top three teams and their oversight professor will join us in Washington, DC area for a live competition as part of the conference events. Teams will compete for bragging rights, and of course, cash prizes.



SFE PD Financial Literacy BOWL

Presented by
XYZ Company

Sponsorship is available for the presenting sponsor of the Financial Literacy Bowl for **\$25,000**, including exclusive naming rights for the event.

Sponsorship includes logo on pre-event publicity, including on marketing materials, conference program, SFE PD website and eblasts, as well as tagging on social media. Opportunity to schedule one-on-one meetings with HBCU students also available.

NAMING OPPORTUNITIES

Anniversary Sponsor

One Available

The company choosing to sponsor the celebration will receive all the benefits of the Platinum Level Sponsorship, one reserved table at event, and the naming of the event

\$30,000

Financial Literacy Bowl

One Available

The company choosing to sponsor the financial literacy bowl will receive all the benefits of the Gold Level Sponsorship, as well as the naming of the event

\$25,000

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NAMING OPPORTUNITIES

Break Sponsor

Two Available

Companies choosing to sponsor a break will receive all the benefits of the Bronze Level Sponsorship, as well as the event acknowledgment

\$8,000

Breakfast Sponsor

Two Available

Companies choosing to sponsor a breakfast will receive all the benefits of the Silver Level Sponsorship, as well as the event acknowledgment

\$12,500

Lunch Sponsor

Two Available

Companies choosing to sponsor a lunch will receive all the benefits of the Silver Level Sponsorship, as well as the event acknowledgment

\$15,000

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SFEPD STAFF



Theodore R. Daniels
Founder and President



**Tiffany Murray,
Ph.D., AFC®**
Managing Director



Una Daniels-Edwards
*Vice President,
Program Management*



Ginie Lynch
Director of Communications



Melissa Schnur
Director of Events



Robert Kinzer
*Lead Financial
Educator*



Martiara Boyd
Student Assistant

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**To secure your sponsorship or
for more information regarding our
Financial Wellness: Agility & Sustainability Conference,
please contact Theodore Daniels at
tdaniels@sfepd.org / 703.920.3807**

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