

RFP Details

RFP Name	FSI OneVoice 2020
Response Due Date	Wed, 05-Apr-2017
Decision Date	Wed, 31-May-2017
RFP Type	Meeting Space and Sleeping Rooms
RFP Code	LVNXTQKYS LZ
Budget	USD \$222,000.00
Description	The FSI One Voice Conference is the in-person annual gathering of the independent broker-dealer community. Education and networking sessions are specifically designed for CEOs, senior executives, managers, and employees of member and prospective member broker-dealers.
Decision Factors	Ease of travel Reasonable airfare and availability of direct flights Room rate (under \$300, inclusive)
Billing Information	Direct Bill
Concessions / Contractual Requirements	<p>Concessions:</p> <ul style="list-style-type: none"> (1) comp 2 bedroom Presidential Suite (Fri-Thurs) for FSI President (2) comp 1 bedroom suites (Sun – Thurs) for FSI Board Chair & Conference Chair (12) 1 bedroom suites at group rate (Sat-Thurs) for Executive Committee & Senior Staff (20) Club/Concierge Level upgrades (Sun-Wed) for FSI Board Members (30) staff/speaker rooms (Sat-Thursday) @ 50% off group rate 1 per 40 room comp policy, credited to Master account Complimentary meeting and exhibit space 15% discount on published menu pricing or 2016 F&B prices locked in for 2019 Group rate honored 3 days pre and post-conference, based on availability 20% allowable attrition (5) comp roundtrip airport limo transfers (5) comp room nights for preplanning meetings No charge for receiving and handling of Group's registration and meeting materials for up to (2) pallets. Boxes less than 50 pounds each. Hotel will not offer lower published rate than the Group rate over event dates 5pm checkout for designated VIPs and staff (3) complimentary Internet hard lines -- for Staff Office, Registration Desk and General Session Resort fees waived 10% discount on all hotel spa services 2017 F&B prices locked in for 2020 No charge to rekey guest or meeting rooms (1) complimentary easel and podium in each meeting room Hotel will waive any set-up or catering fees for small meetings under 25 attendees Affiliate food and beverage will go towards meeting the overall food and beverage minimum Board of Directors Meeting VIP set (leather executive chairs for up to 26 participants) (10) complimentary VIP welcome amenities Complimentary high speed Internet access in guestrooms for all reservations booked within our block

Key Contact Information			
Contact Name	diana carmenates	Email Address	diana.carmenates@financialservices.org
Organization	Financial Services Institute	Phone	2023041049
Title	meetings manager		
Preferred Contact Method	Cvent, Email, Phone		
Address	607 14th street, nw suite 750 washington, DC 20005 USA		
Website	www.financialservices.org		
Additional Information	The Financial Services Institute (FSI) is the only organization advocating solely on behalf of independent financial advisors and independent financial services firms. For more information, please visit financialservices.org.		
	The economic impact of this meeting on San Fran in 2017 was \$2,413,479.		

Organization Information			
Organization Name	Financial Services Institute		
Organization Type	Association	Industry	Financial Services
Address	607 14h Street, NW Suite 750 Washington, DC 20005 USA		
Employees	1 - 50	Avg. Attendees / Event	301 - 500
Events / Year	3	Avg. Room Nights / Event	151 - 300
		Total Attendees / Year	1,001 - 1,500
Multi-day Events	100%	Total Room Nights / Year	1,501 - 2,000
Organization Information	The Financial Services Institute (FSI) was founded in 2004 with a clear mission: to ensure that all individuals have access to competent and affordable financial advice, products and services delivered by a growing network of independent financial advisors and independent financial services firms. At FSI, everything we do starts and ends with working to create a healthier, more business-friendly regulatory environment for our members – the independent financial services firms and independent financial advisors who provide affordable, unbiased advice to hard-working Main Street Americans. For more information about FSI, please visit http://www.financialservices.org/ .		

Event Information			
Event Name	FSI OneVoice 2020		
Total Attendees	700	Total Budget	USD \$222,000.00
Event Type	Conference / Convention		
		Largest Room Required	12,000 Sq. Ft. (1,200 Sq. Mtr.)

Commission	No
Event History	The planner has indicated that this event has been held before.
Dates Flexible?	No
Event Dates	Mon, 27-Jan-2020 - Wed, 29-Jan-2020
Contract Signature Location	Washington, DC
Business Objectives	The FSI One Voice Conference is the in-person annual gathering of the independent broker-dealer community. Education and networking sessions are specifically designed for CEOs, senior executives, managers, and employees of member and prospective member broker-dealers.
Destinations Under Consideration	Los Angeles Orlando Miami Houston San Antonio Las Vegas
Additional Information	FSI is comprised of financial advisor members and broker-dealer members who are committed to creating a healthier, more business friendly regulatory environment for independent financial services firms and independent financial advisors. FSI currently has over 35,000 Financial Advisor Members, and 104 Broker-Dealer Firm members.

Previous Event History

This event was previously held in the following location(s):

Venue Name	City	State	Date	Attendees	Room Block	Room Pick-Up	F&B Spend
2017	San Francisco	California	Jan. 23-25	650	1,575	1,634	232,099
2016	Orlando	Florida	Jan. 25-27	677	1,665	1,315	183,515
2015	San Antonio	Texas	Jan. 26-28	765	1,636	1,384	173,336

Sleeping Room Requirements

Day	Any (Run Of House)	Single (1 Bed)	Double (2 Beds)	Suite	Staff
Fri, 24-Jan-2020				1	3
Sat, 25-Jan-2020	4			1	30
Sun, 26-Jan-2020	147			13	30
Mon, 27-Jan-2020	554			15	30
Tue, 28-Jan-2020	571			15	30
Wed, 29-Jan-2020	129			15	30
Thu, 30-Jan-2020	19				

Check-in Date Fri, 24-Jan-2020

Total Room Nights 1,637

Peak Room Nights 616

Additional Information 2 bedroom Presidential Suite (Friday-Thurs) for FSI President
1 bedroom suites (Sun – Thursday) for FSI Board Chair & Conference Chair
(12) 1 bedroom suites at group rate (Sat-Thurs) for Executive Committee & Senior Staff
(15) Club/Concierge Level upgrades (Sun-Wed) for FSI Board Members
(30) staff/speaker rooms (Sat-Thursday) @ 50% off group rate
1 per 40 room comp policy, credited to Master account
Group rate honored 3 days pre and post-conference, based on availability
20% allowable attrition

Meeting Room Requirements			
Start Date Sat, 25-Jan-2020			
Day	Time	Agenda Item	Room Request
Sat, 25-Jan-2020	12:00 AM-11:45 PM	Show Office Office	Conference 2 people • 24-hour hold
Sat, 25-Jan-2020	12:00 AM-11:45 PM	Office Office <i>Notes or Exceptions: Tables set along the perimeter of the room for equipment and supplies. One large table set in the middle for meals/working Large trash cans</i>	Other 600 Sq. Ft. / 15 people • 24-hour hold
Sat, 25-Jan-2020	12:00 AM-11:45 PM	AV Storage Storage Room	• 24-hour hold
Sat, 25-Jan-2020	8:00 AM-11:45 PM	General Session Set Up General Session <i>Notes or Exceptions: Theater seating for 700 people, chevron Set in 5 sections with center aisle 10-15 scattered high boys in back of room 16'x30'24" stage</i>	Theater 12,200 Sq. Ft. / 700 people • 24-hour hold
Sun, 26-Jan-2020	12:00 AM-11:45 PM	Show Office Office	Conference 2 people • 24-hour hold
Sun, 26-Jan-2020	12:00 AM-11:45 PM	Office Office <i>Notes or Exceptions: Tables set along the perimeter of the room for equipment and supplies. One large table set in the middle for meals/working Large trash cans</i>	Other 600 Sq. Ft. / 15 people • 24-hour hold
Sun, 26-Jan-2020	12:00 AM-11:45 PM	AV Storage Storage Room	• 24-hour hold
Sun, 26-Jan-2020	8:00 AM-11:45 PM	Exhibit Hall Set Up Exhibit <i>Notes or Exceptions: (38) 10x10 booths + space for meals</i>	10x10 12,000 Sq. Ft. / 700 people • 24-hour hold
Sun, 26-Jan-2020	8:00 AM-11:45 PM	Registration Set Up Registration <i>Notes or Exceptions: 4 kiosks or built-in desk with room for 700 people to register</i>	Other 7,000 Sq. Ft. / 2 people • 24-hour hold
Sun, 26-Jan-2020	8:00 AM-11:45 PM	General Session Rehearsals General Session <i>Notes or Exceptions: Theater seating for 700 people, chevron Set in 5 sections with center aisle 10-15 scattered high boys in back of room 16'x30'24" stage</i>	Theater 12,200 Sq. Ft. / 700 people • 24-hour hold
Mon, 27-Jan-2020	12:00 AM-11:45 PM	Show Office Office	Conference 2 people • 24-hour hold

Mon, 27-Jan-2020	12:00 AM-11:45 PM	Staff Office Office <i>Notes or Exceptions: Tables set along the perimeter of the room for equipment and supplies. One large table set in the middle for meals/working Large trash cans</i>	Other 600 Sq. Ft. / 15 people • 24-hour hold
Mon, 27-Jan-2020	12:00 AM-11:45 PM	Press/Media Office Office <i>Notes or Exceptions: Cocktail rounds</i>	Rounds 200 Sq. Ft. / 10 people • 24-hour hold
Mon, 27-Jan-2020	12:00 AM-11:45 PM	Pop Up Meeting Room Meeting <i>Notes or Exceptions: (2) 6' tables 30"x30" table (3) chairs</i>	Other 200 Sq. Ft. / 8 people • 24-hour hold
Mon, 27-Jan-2020	12:00 AM-11:45 PM	Pop Up Meeting Room Meeting <i>Notes or Exceptions: Cocktail rounds</i>	Rounds 200 Sq. Ft. / 10 people • 24-hour hold
Mon, 27-Jan-2020	12:00 AM-11:45 PM	Pop Up Meeting Room Meeting <i>Notes or Exceptions: Cocktail rounds</i>	Rounds 200 Sq. Ft. / 12 people • 24-hour hold
Mon, 27-Jan-2020	12:00 AM-11:45 PM	AV Storage Storage Room	• 24-hour hold
Mon, 27-Jan-2020	8:00 AM-4:00 PM	Board of Directors Meeting Meeting <i>Notes or Exceptions: **VIP Event** Executive Chairs Prefer room with natural light Breakfast, lunch and am pm breaks 2x6 seating Space for meals inside room (3 rounds)</i>	U-Shaped 30 people
Mon, 27-Jan-2020	8:00 AM-5:00 PM	Pre-Conference Workshop Breakout	Crescent Rounds 100 people
Mon, 27-Jan-2020	8:00 AM-11:45 PM	General Session General Session <i>Notes or Exceptions: Theater seating for 700 people, chevron Set in 5 sections with center aisle 10-15 scattered high boys in back of room 16'x30'24" stage</i>	Theater 12,200 Sq. Ft. / 700 people • 24-hour hold
Mon, 27-Jan-2020	8:00 AM-11:45 PM	Registration Registration <i>Notes or Exceptions: 4 kiosks or built-in desk with room for 700 people to register</i>	Other 7,000 Sq. Ft. / 700 people • 24-hour hold
Mon, 27-Jan-2020	8:00 AM-11:45 PM	Pop-up Meeting Room Meeting	Conference 500 Sq. Ft. / 12 people • 24-hour hold
Mon, 27-Jan-2020	8:00 AM-11:45 PM	Exhibit Hall Exhibit <i>Notes or Exceptions: (38) 10x10 booths + space for meals 5:15-6:45pm - Reception for 500, flow</i>	10x10 12,000 Sq. Ft. • 24-hour hold
Mon, 27-Jan-2020	11:30 AM-1:00 PM	Council Member Lunch Lunch	Rounds 600 Sq. Ft. / 50 people

Mon, 27-Jan-2020	12:00 PM-3:00 PM	Marketing Growth & Development Council Meeting	Hollow Square 1,200 Sq. Ft. / 30 people
Mon, 27-Jan-2020	12:00 PM-3:00 PM	Compliance Council Meeting	Conference 600 Sq. Ft. / 15 people
Mon, 27-Jan-2020	12:00 PM-3:00 PM	Due Diligence Council Meeting	Conference 600 Sq. Ft. / 15 people
Mon, 27-Jan-2020	12:00 PM-3:00 PM	Operations & Technology Council Meeting	Conference 600 Sq. Ft. / 15 people
Mon, 27-Jan-2020	12:00 PM-3:00 PM	Investment Advisory Services Council Meeting	Conference 600 Sq. Ft. / 15 people
Mon, 27-Jan-2020	2:00 PM-11:45 PM	Education Session Setup Breakout <i>Notes or Exceptions: 8x24x24 stage and head table for 6 people</i>	Crescent Rounds 2,100 Sq. Ft. / 125 people • 24-hour hold
Mon, 27-Jan-2020	2:00 PM-11:45 PM	Education Session Setup Breakout <i>Notes or Exceptions: 8x24x24 stage and head table for 6 people</i>	Crescent Rounds 2,100 Sq. Ft. / 125 people • 24-hour hold
Mon, 27-Jan-2020	2:00 PM-11:45 PM	Education Session Set Up Breakout <i>Notes or Exceptions: 8x24x24 stage and head table for 6 people</i>	Crescent Rounds 2,100 Sq. Ft. / 125 people • 24-hour hold
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Mon, 27-Jan-2020	2:00 PM-11:45 PM	Education Session Setup Breakout <i>Notes or Exceptions: 8x24x24 stage and head table for 6 people</i>	Crescent Rounds 2,100 Sq. Ft. / 125 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 AM	Education Session Breakout <i>Notes or Exceptions: 8x24x24 stage and head table for 6 people</i>	Crescent Rounds 2,100 Sq. Ft. / 125 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Show Office Office	Conference 2 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Staff Office Office <i>Notes or Exceptions: Tables set along the perimeter of the room for equipment and supplies. One large table set in the middle for meals/working Large trash cans</i>	Other 600 Sq. Ft. / 15 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	General Session & Tear Down General Session <i>Notes or Exceptions: Theater seating for 700 people, chevron Set in 5 sections with center aisle 10-15 scattered high boys in back of room 16'x30'24" stage</i>	Theater 12,200 Sq. Ft. / 700 people • 24-hour hold

Tue, 28-Jan-2020	12:00 AM-11:45 PM	Pop Up Meeting Room Meeting <i>Notes or Exceptions: (2) 6' tables 30"x30" table (3) chairs</i>	Other 200 Sq. Ft. / 8 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Pop Up Meeting Room Meeting <i>Notes or Exceptions: Cocktail rounds</i>	Rounds 200 Sq. Ft. / 10 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Pop Up Meeting Room Meeting <i>Notes or Exceptions: Cocktail rounds</i>	Rounds 200 Sq. Ft. / 12 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Education Session Breakout <i>Notes or Exceptions: 8x24x24 stage and head table for 6 people</i>	Crescent Rounds 2,100 Sq. Ft. / 125 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Education Session Breakout <i>Notes or Exceptions: 8x24x24 stage and head table for 6 people</i>	Crescent Rounds 2,100 Sq. Ft. / 125 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Education Session Breakout <i>Notes or Exceptions: 8x24x24 stage and head table for 6 people</i>	Crescent Rounds 2,100 Sq. Ft. / 125 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Education Session Breakout <i>Notes or Exceptions: 8x24x24 stage and head table for 6 people</i>	Crescent Rounds 2,100 Sq. Ft. / 125 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Education Session Breakout <i>Notes or Exceptions: 8x24x24 stage and head table for 6 people</i>	Crescent Rounds 2,100 Sq. Ft. / 125 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Press/Media Office Office <i>Notes or Exceptions: **Breakfast for 20 at 8am**</i>	Rounds 250 Sq. Ft. / 20 people • 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	AV Storage Storage Room	• 24-hour hold
Tue, 28-Jan-2020	8:00 AM-11:45 PM	Exhibit Hall Exhibit <i>Notes or Exceptions: (38) 10x10 booths + space for meals</i> <i>6:45-7:45am -- Continental breakfast for 550, flow</i> <i>9:30-10am -- Morning coffee break for 400</i> <i>12-1:30pm -- Lunch for 500 in rounds</i> <i>2:30-3pm -- Afternoon coffee break for 400</i> <i>5:30-7pm -- Reception for 500</i>	10x10 12,000 Sq. Ft. • 24-hour hold
Tue, 28-Jan-2020	8:00 AM-11:45 PM	Registration Registration <i>Notes or Exceptions: 4 kiosks or built-in desk with room for 700 people to register</i>	Other 7,000 Sq. Ft. / 700 people • 24-hour hold
Tue, 28-Jan-2020	8:00 AM-11:45 PM	Pop-up Meeting Room Meeting	Conference 500 Sq. Ft. / 12 people • 24-hour hold
Tue, 28-Jan-2020	12:00 PM-1:30 PM	Prospect Luncheon Lunch	Crescent Rounds 20 people

Wed, 29-Jan-2020	12:00 AM-12:00 PM	Pop Up Meeting Room Meeting <i>Notes or Exceptions: Cocktail rounds</i>	Rounds 200 Sq. Ft. / 10 people • 24-hour hold
Wed, 29-Jan-2020	12:00 AM-12:00 PM	Discussion Breakout	Hollow Square 2,300 Sq. Ft. / 65 people
Wed, 29-Jan-2020	12:00 AM-12:00 PM	Discussion Breakout	Hollow Square 2,000 Sq. Ft. / 50 people • 24-hour hold
Wed, 29-Jan-2020	12:00 AM-12:00 PM	Discussion Breakout	Hollow Square 1,700 Sq. Ft. / 45 people • 24-hour hold
Wed, 29-Jan-2020	12:00 AM-12:00 PM	Discussion Breakout	Hollow Square 2,300 Sq. Ft. / 65 people • 24-hour hold
Wed, 29-Jan-2020	12:00 AM-12:00 PM	Discussion Breakout	Hollow Square 1,700 Sq. Ft. / 45 people • 24-hour hold
Wed, 29-Jan-2020	12:00 AM-12:00 PM	Discussion Breakout	Hollow Square 1,700 Sq. Ft. / 45 people • 24-hour hold
Wed, 29-Jan-2020	12:00 AM-1:00 PM	Pop Up Meeting Room Meeting <i>Notes or Exceptions: Cocktail rounds</i>	Rounds 200 Sq. Ft. / 12 people • 24-hour hold
Wed, 29-Jan-2020	12:00 AM-3:00 PM	Move Out Office <i>Notes or Exceptions: Tables set along the perimeter of the room for equipment and supplies. One large table set in the middle for meals/working Large trash cans</i>	Other 600 Sq. Ft. / 15 people
Wed, 29-Jan-2020	12:00 AM-3:00 PM	Registration & Tear Down Registration <i>Notes or Exceptions: 4 kiosks or built-in desk with room for 700 people to register</i>	Other 7,000 Sq. Ft. / 2 people
Wed, 29-Jan-2020	12:00 AM-3:00 PM	Pop Up Meeting Room Meeting <i>Notes or Exceptions: (2) 6' tables 30"x30" table (3) chairs</i>	Other 200 Sq. Ft. / 8 people • 24-hour hold
Wed, 29-Jan-2020	12:00 AM-5:00 PM	AV Storage Storage Room	
Wed, 29-Jan-2020	12:00 AM-11:45 PM	Show Office Office	Conference 2 people • 24-hour hold
Wed, 29-Jan-2020	7:30 AM-8:30 AM	Continental Breakfast Breakfast <i>Notes or Exceptions: Foyer of breakouts or in each Discussion breakout room Seating required</i>	Buffet 2,800 Sq. Ft. / 300 people
Wed, 29-Jan-2020	8:00 AM-12:00 PM	Exhibit Hall Tear Down Exhibit <i>Notes or Exceptions: (38) 10x10 booths + space for meals</i>	10x10 12,000 Sq. Ft.

Wed, 29-Jan-2020	10:00 AM-10:30 AM	Coffee Break Break <i>Notes or Exceptions: Foyer of Discussion breakouts</i>	Buffet 2,800 Sq. Ft. / 300 people
Wed, 29-Jan-2020	12:00 PM-5:00 PM	LIMRA 1 Meeting	U-Shaped 1,100 Sq. Ft. / 30 people
Wed, 29-Jan-2020	1:00 PM-5:00 PM	LIMRA 2 Meeting	U-Shaped 1,100 Sq. Ft. / 30 people
Thu, 30-Jan-2020	12:00 PM-5:00 PM	LIMRA 1 Meeting	U-Shaped 1,100 Sq. Ft. / 30 people
Thu, 30-Jan-2020	1:00 PM-5:00 PM	LIMRA 2 Meeting	U-Shaped 1,100 Sq. Ft. / 30 people

F&B Budget USD \$202,000.00

Peak Meeting Rooms 26

A/V Needs We will be bringing our own AV company