Financial Services Institute



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 LVNXTQKYSLZ

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 Concessions:

Requirements (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

Financial Services Institute



Key Contact Information

Contact Name diana carmenates Email Address diana.carmenates@financials

ervices.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 <u>www.financialservices.org</u>

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.)

Financial Services Institute



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 Los Angeles

Consideration 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

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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

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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 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	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 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	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 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	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 Notes or Exceptions: (38) 10x10 booths + space for meals	10x10 12,000 Sq. Ft. / 700 people 24-hour hold
Sun, 26-Jan-2020	8:00 AM-11:45 PM	Registration Set Up Registration Notes or Exceptions: 4 kiosks or built-in desk with room for 700 people to register	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 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	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 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	Other 600 Sq. Ft. / 15 people 24-hour hold



Mon, 27-Jan-2020	12:00 AM-11:45 PM	Press/Media Office Office Notes or Exceptions: Cocktail rounds	Rounds 200 Sq. Ft. / 10 people 24-hour hold
Mon, 27-Jan-2020	12:00 AM-11:45 PM	Pop Up Meeting Room Meeting Notes or Exceptions: (2) 6' tables 30"x30" table (3) chairs	Other 200 Sq. Ft. / 8 people 24-hour hold
Mon, 27-Jan-2020	12:00 AM-11:45 PM	Pop Up Meeting Room Meeting Notes or Exceptions: Cocktail rounds	Rounds 200 Sq. Ft. / 10 people 24-hour hold
Mon, 27-Jan-2020	12:00 AM-11:45 PM	Pop Up Meeting Room Meeting Notes or Exceptions: Cocktail rounds	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 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)	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 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	Theater 12,200 Sq. Ft. / 700 people 24-hour hold
Mon, 27-Jan-2020	8:00 AM-11:45 PM	Registration Registration Notes or Exceptions: 4 kiosks or built-in desk with room for 700 people to register	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 Notes or Exceptions: (38) 10x10 booths + space for meals 5:15-6:45pm - Reception for 500, flow	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 Notes or Exceptions: 8x24x24 stage and head table for 6 people	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 Notes or Exceptions: 8x24x24 stage and head table for 6 people	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 Notes or Exceptions: 8x24x24 stage and head table for 6 people	Crescent Rounds 2,100 Sq. Ft. / 125 people 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 AM	Education Session Breakout Notes or Exceptions: 8x24x24 stage and head table for 6 people	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 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	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 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	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 Notes or Exceptions: (2) 6' tables 30"x30" table (3) chairs	Other 200 Sq. Ft. / 8 people 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Pop Up Meeting Room Meeting Notes or Exceptions: Cocktail rounds	Rounds 200 Sq. Ft. / 10 people 24-hour hold



Tue, 28-Jan-2020	12:00 AM-11:45 PM	Pop Up Meeting Room Meeting Notes or Exceptions: Cocktail rounds	Rounds 200 Sq. Ft. / 12 people 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Education Session Breakout Notes or Exceptions: 8x24x24 stage and head table for 6 people	Crescent Rounds 2,100 Sq. Ft. / 125 people 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Education Session Breakout Notes or Exceptions: 8x24x24 stage and head table for 6 people	Crescent Rounds 2,100 Sq. Ft. / 125 people 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Education Session Breakout Notes or Exceptions: 8x24x24 stage and head table for 6 people	Crescent Rounds 2,100 Sq. Ft. / 125 people 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Education Session Breakout Notes or Exceptions: 8x24x24 stage and head table for 6 people	Crescent Rounds 2,100 Sq. Ft. / 125 people 24-hour hold
Tue, 28-Jan-2020	12:00 AM-11:45 PM	Education Session Breakout Notes or Exceptions: 8x24x24 stage and head table for 6 people	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 Notes or Exceptions: **Breakfast for 20 at 8am**	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 Notes or Exceptions: (38) 10x10 booths + space for meals 6:45-7:45am Continental breakfast for	10x10 12,000 Sq. Ft. 24-hour hold
		550, flow 9:30-10am Morning coffee break for 400	
		12-1:30pm Lunch for 500 in rounds	
		2:30-3pm Afternoon coffee break for 400 5:30-7pm Reception for 500	
Tue, 28-Jan-2020	8:00 AM-11:45 PM	Registration Registration Notes or Exceptions: 4 kiosks or built-in desk with room for 700 people to register	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 Notes or Exceptions: Cocktail rounds	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 Notes or Exceptions: Cocktail rounds	Rounds 200 Sq. Ft. / 12 people 24-hour hold
Wed, 29-Jan-2020	12:00 AM-3:00 PM	Move Out Office 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	Other 600 Sq. Ft. / 15 people
Wed, 29-Jan-2020	12:00 AM-3:00 PM	Registration & Tear Down Registration Notes or Exceptions: 4 kiosks or built-in desk with room for 700 people to register	Other 7,000 Sq. Ft. / 2 people
Wed, 29-Jan-2020	12:00 AM-3:00 PM	Pop Up Meeting Room Meeting Notes or Exceptions: (2) 6' tables 30"x30" table (3) chairs	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 Notes or Exceptions: Foyer of breakouts or in each Discussion breakout room Seating required	Buffet 2,800 Sq. Ft. / 300 people
Wed, 29-Jan-2020	8:00 AM-12:00 PM	Exhibit Hall Tear Down Exhibit Notes or Exceptions: (38) 10x10 booths + space for meals	10x10 12,000 Sq. Ft.
Wed, 29-Jan-2020	10:00 AM-10:30 AM	Coffee Break Break Notes or Exceptions: Foyer of Discussion breakouts	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

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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