

From: [William Croke-Martin](#)
To: [Mike Lee](#)
Cc: [Connor Hausmann](#); [Veronica Campbell](#)
Subject: Canexport events list
Date: July 11, 2022 2:47:53 PM
Attachments: [image001.png](#)

Hi Mike,

As requested earlier I'm writing about the events not currently included in the canexport application.

Currently in the canexport application we are asking for funding (travel and/or event costs) for 6 events:

- Vincent
- SBDC 43rd annual conference
- Finovate Fall
- AZ Fintech Council
- Money 20/20
- Fintech Meetup

Below are the 4 events that have not been included yet, alongside with research/comments from Jacob and I. According to Connor, we can add about another \$20-25k in expenses due to the budget maximum of 100k. The budget spreadsheet is linked [here](#) for other logistics to consider (dates etc.)

Boston Fintech Week

Importance: By company type, 23% are financial professionals, 19% start-up, 19% VCs. By role, 39% are vice presidents, 25% director, 21% owner/partner.

Date: Sept 27 – 29 2022

Location: Boston, MA

Cost: CAD \$191 for attendee ticket

Content: Past sponsors include Citizens Bank, Wells Fargo, Silicon Valley Bank, Eastern Bank, Forward Financing. 2021 agenda had a daily topic/theme (Capital/insurance, Lending/Banking, Payments/Crypto). **Overall difficult to assess value for Fundica, can't find information on attendees (previous or current).**

Jacob's comment: I think it could be worthwhile to attend with the general admission tickets, since those tickets are very inexpensive. At the very least it would be interesting to engage with some of the FI sponsors that will be likely to attend again.

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Small Biz Banking

Importance: 450+ banking professionals. 30% are small banking business professionals, 28% retail bankers, 26% SVP/EVP/Presidents, 11% C-level executives

Date: Oct 2 - 4 2022

Location: Nashville, TN

Cost: CAD 2,051 for ticket, a booth is 7,718.

Content: event for banking industry leaders who are focused on the biggest challenges and opportunities that come with serving small businesses, including credit risk, client engagement, the consolidation of B2B spending tools, prioritizing digital offerings and so much more.

Attended Companies: <https://conference.americanbanker.com/small-biz-banking/page/2022049/attended-companies>

Jacob's comment: Since we are now really focused on targeting community banks, I think this event could be a great opportunity for us to connect with some valuable potential prospects. May be especially worthwhile to invest in a booth for this conference to help attract the attention of the community bank exec attendees.

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CUNA Lending Council Conference

Importance: Mike suggested this as it's sure to have a high number/ratio of CUs.

Date: November 2 – November 05 2022

Location: San Diego

Cost: we would have to sponsor as we are not a CU – 6,089 CAD to sponsor (includes one attendee, can buy another discounted attendee at 1,544 CAD

- **Silver Level (\$4,750)** – includes 1 complimentary conference pass; 2 additional passes may be purchased at the \$1,199 discounted sponsor rate.
 - Attractive display signage posted at the sponsored event.
 - Inclusion in the sponsorship listing of the conference APP, used throughout the conference.
 - Public recognition at several of the conference general sessions.
 - A link to your website from the conference website before and at the conclusion of the conference.
 - Ability to attend all functions associated with the conference.
 - Access to attendee contact information – name, job title, company, address, email
 - Ability to speak for 1-2 minutes at the beginning of a sponsored breakout or general session.
 - Endless networking opportunities.
 - First chance to sponsor the same activity for the subsequent conference.

Attendees: in 2019, 247 CUs attended (652 total attendees)

Content: I believe it's a general networking and meeting opportunity for CUs, to discuss various topics in the industry. Based on initial budgeting this is the 3rd most expensive event being looked at. While it will have a high number/ratio of CUs, I'm unsure of the relevancy of the event (I.e., if CUs will be going with intention to meet fintechs, as opposed to just meeting other CUs).

Jacob's comment: "I noticed that a lot of CU conferences primarily consist of CU execs networking with one another and mostly ignoring the other vendors/ sponsors." "...We did still end up networking with many CU execs at the CCUA conference. A lot of CUs ended up being very small, however, and most either did not have the potential or enthusiasm to be a potential Fundica prospect. Overall, I would place this conference lower on the priority list. If we do end up still having leftover funds and bandwidth after some of the other conferences, we can considering sponsoring this event."

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Future Digital Finance 2023

Importance: Small-scale event based around digital finance/banking. In 2022, 40% of companies attending were banks, 25% CUs, 15% credit cards and 20% tech companies. For speaking opportunities, can contact Olga.Rodriguez@wbresearch.com

Date: March 06 – March 07 2023

Location: Austin TX

Cost:

- A booth is CAD 20,604 (2 attendee tickets included).
- One attendee ticket is CAD 4249-4378

Previous (2022) Attendees: [See list here](#)

Content:

Key Themes for FDF 2023 Include:

- Digital Transformation and the Adoption of Tools, Strategies and Initiatives
- Customer Centricity; Responding To Quickly Shifting Customer Expectations
- Fintech Partnerships and Building a Foundation for Future Innovation

Attendee Seniority:

23% C-Level

41% SVP or higher

23% VP

13% Principal/Lead

Jacob's comment: Seems like the event has a decent number of attendees that would be of interest to Fundica as potential prospects. However, both the general attendee tickets and sponsorship costs seem very high, at least compared to other conferences. I would again suggest to put this conference lower on the priority list as we do have limited resources. If by the beginning of 2023 we still have leftover funding, we can consider attending this event.

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