



CFA Society
India

3RD INDIA WEALTH MANAGEMENT CONFERENCE

Trends, Opportunities, and Catalysts for Change

Friday, 31 August 2018 | The Leela, Mumbai

#INWealth



Hosted with CFA Institute

**SPONSORSHIP
OPPORTUNITIES**

EVENT OVERVIEW

Robust and widespread economic growth has enhanced the importance of wealth management in India. Yet, from asset allocation and manager selection to behavioral coaching and succession planning, the need for understanding best practices and frameworks that are successful has never been higher. CFA Institute, through its diverse worldwide membership, is uniquely positioned to bring together global experts to share their insights. The third edition of our full day wealth management conference will be hosted on the 31st of August at the Leela in Andheri, Mumbai. It will be a unique opportunity for industry stakeholders to debate, discuss, and learn from leaders.

About CFA Institute

CFA Institute is a global community of investment professionals working to build an investment management industry where investors' interests come first, financial markets function at their best, and economies grow.

We are driven by the belief that lasting economic growth depends on trust, competence, and transparency in financial markets, and we know that it must be led by professionals who are ethically centered and professionally trained.

We are here to lead, support, and connect all who want to create a better investment industry.

Top employers of CFA Institute members globally:

TD Bank Financial Group · UBS · Wells Fargo ·
Bank of America Merrill Lynch · BlackRock · BMO Financial Group ·
Credit Suisse · HSBC · JPMorgan Chase · Royal Bank of Canada ·

About CFA Society India*

CFA Society India (Indian Association of Investment Professionals), established in April 2005, is an association of local investment professionals, consisting of portfolio managers, security analysts, investment advisers, and other financial professionals. As one of the over 150 CFA Institute member societies, CFA Society India connects local members to a global network of investment professionals. The key objectives of CFA Society India are to promote ethical and professional standards within the investment industry in India and to facilitate the exchange of information and opinions among people within the local investment community and beyond. CFA Society India also works to further the public's understanding of the CFA® designation and the investment industry.

* CFA Society India is a registered trademark of CFA Institute licensed to be used by the Indian Association of Investment Professionals.

Top employers of CFA charterholders in Mumbai:

Ambit Group · Citigroup · CRISIL · Deutsche Bank · Goldman Sachs ·
HSBC · ICICI Group · JP Morgan Chase · MSCI Barra · State Bank of India



CONTACTS

To secure any of these opportunities and gain access to wealth management professionals attending the India Wealth Management Conference, please contact:

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ARATI PORWAL

Director, Society Relations, India
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DISTINGUISHED SPEAKERS FROM PAST CONFERENCES



Sirshendu Basu

Head - Managed Investment and
Product Management
Standard Chartered Bank



Jean L.P. Brunel, CFA

Managing Principal
Brunel Associates LLC



Chandrima Das

Co-founder and Chief Executive Officer
Bento



Rajesh Gupta

Managing Partner
SNG & Partners



Jaideep Hansraj

Chief Executive Officer - Wealth
Management and Priority Banking
Kotak Mahindra Bank Limited



Anshu Kapoor

Head of Private Wealth Management
Edelweiss Global Wealth Management



Pramod Kumar

Chief Executive Officer
Wealth Advisors (I) Pvt. Ltd.



Randall S. Kroszner

Governor of the U.S. Federal Reserve
System (2006–2009)
Member of the U.S. President's Council
Economic Advisers (2001–2003)
Norman R. Bobins Professor of
Economics at the University of Chicago
Booth School of Business



Srikanth Meenakshi

Co-founder and Chief Operating Officer
FundsIndia



Saurabh Mukherjea, CFA

Chief Executive Officer
Ambit Capital



Navneet Munot, CFA

Chief Investment Officer
SBI Funds Management Pvt. Ltd.



Vivek Pai, CFA

Managing Director and Principal Officer
Aroha Capital



Prateek Pant

Cofounder and Head of
Products and Solutions
Sanctum Wealth Management



Vineet Vohra, CFA

Director and Practice Leader
Arete Financial Partners



Sankaran Naren

Chief Investment Officer of Equities,
Fund Manager and Director
ICICI Prudential Asset Management
Co., Ltd.

CONFERENCE DELEGATES

Wealth management professionals attend the India Wealth Management Conference to network with peers; attend educational sessions led by respected industry experts; and learn about new resources, products, and services that are available to assist their performance in their profession.

Our conference delegates are primarily wealth management professionals who have worked in the investment industry (mostly equities) for more than 10 years. Firms represented include wealth managers, investment management firms, consulting firms, investment banks/brokerages, service providers to the investment industry, bank/trust departments, mutual funds, family offices, and others involved in the management of private wealth.

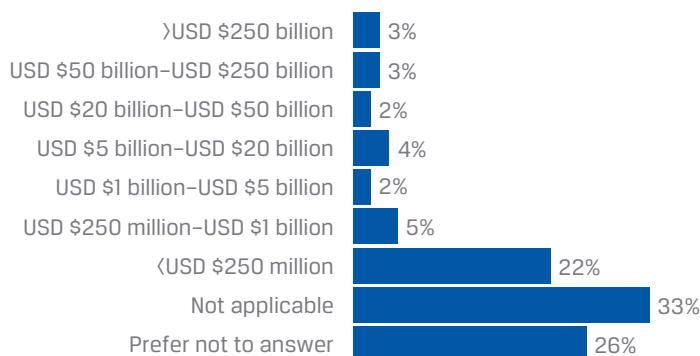
The demographic profile reflects data from the 2017 India Wealth Management Conference

300+ | Delegate Attendance

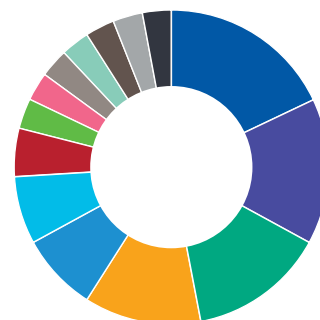
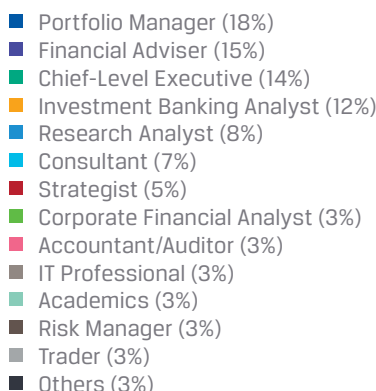
CFA Institute Membership Status



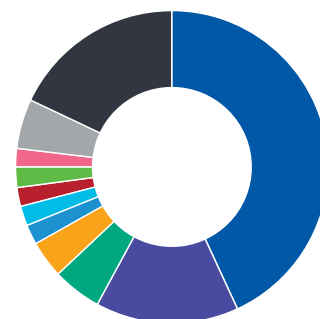
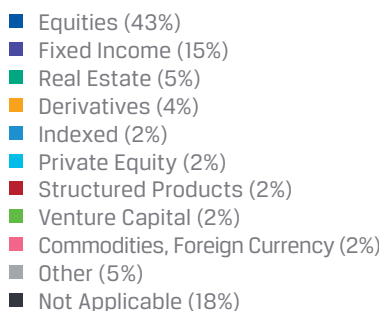
Employer AUM (USD)



Delegate Occupation



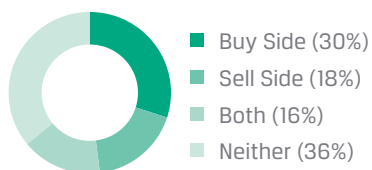
Primary Investment Practice



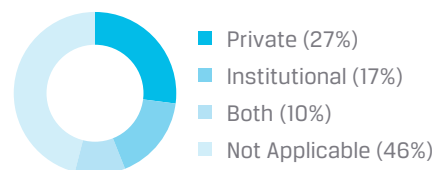
Region



Buy Side/Sell Side



Primary Asset Base



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SPONSORSHIP & EXHIBIT PROGRAM

PREMIUM SPONSOR

5 lakhs* | 3 Available

30 Complimentary Passes (For Delegates and Staff)

Premium sponsors can enjoy maximum exposure, generate strong sales leads, and raise their firms' profiles in the investment community through this opportunity to interact face-to-face with industry decision makers and achieve business development goals. Display and demonstrate your firm's products and services directly to local investment professionals. Morning and afternoon refreshment breaks will be served in the exhibit area.

STANDARD EXHIBIT

2 lakhs* | 3 Available

15 Complimentary Passes (For Delegates and Staff)

Exhibitors can generate strong sales leads and raise their firms' profiles in the investment community through this opportunity to interact face-to-face with industry decision makers and achieve business development goals. Display and demonstrate your firm's products and services directly to local investment professionals. Morning and afternoon refreshment breaks will be served in the exhibit area.

REFRESHMENT BREAK SPONSOR

2 lakhs* | 1 Available

10 Complimentary Passes (For Delegates and Staff)

The Refreshment Break Sponsorship provides your firm with the opportunity to indirectly engage a large audience and receive recognition during the morning and the afternoon refreshment breaks. The sponsor is promoted through signage and branded table tents during the morning and the afternoon refreshment breaks.

NETWORKING LUNCH SPONSOR

2 lakhs* | 1 Available

10 Complimentary Passes (For Delegates and Staff)

The Networking Luncheon Sponsorship provides your firm with the opportunity to indirectly engage a large audience and receive recognition during lunch. The sponsor is promoted through signage and branded table tents at the networking lunch.

LANYARD SPONSOR

4 lakhs* | 1 Available

10 Complimentary Passes (For Delegates and Staff)

As the Lanyard Sponsor, your firm enjoys high visibility by cobranding each delegate lanyard. This opportunity is limited to one sponsor.

**exclusive of GST*



SPONSORSHIP OPPORTUNITIES

SPONSORSHIP & EXHIBIT OPPORTUNITIES	Premium Sponsor	Standard Exhibit	Networking Lunch Sponsor	Refreshment Break Sponsor	Lanyard Sponsor
Quantity Available	3	3	1	1	1
Price (in INR, exclusive of GST)	5 lakhs	2 lakhs	2 lakhs	2 lakhs	4 lakhs
Deliverables					
Pre-event					
Digital recognition on the conference webpage supporter section	•	•	•	•	•
Recognition in promotional emails and/or print advertisements	•	•	•	•	•
One-time use of the pre-event physical mailing and opt-in email list	•	•	•	•	•
Onsite					
Tabletop exhibit booth space*	•	•			
Exclusive branding at the networking luncheon			•		
Exclusive branding during the morning and the afternoon refreshment breaks				•	
Cobranding on each delegate's lanyard					•
Recognition in onsite conference branding: tentcard, event directional signage	•				
Recognition in onsite conference branding: stage backdrop, housekeeping slides, sponsor section of conference program	•	•	•	•	•
Marketing collateral (one piece) included with delegate conference materials	•				
Print advertisement in conference program	1 Page	½ Page	½ Page	½ Page	½ Page
Complimentary passes: full access to the conference (for delegates and staff)	30	15	10	10	10
Announcement of firm by conference chairman during the conference	•	•			
Post-event					
One-time use of the post-event physical mailing and opt-in email list	•	•	•	•	•
Discount on advertising in <i>Financial Analysts Journal</i> ®	40% Discount	40% Discount	40% Discount	40% Discount	40% Discount

*Exhibit selection order is determined by the sponsorship level and the chronological order in which signed agreements are submitted.

** Morning and afternoon break selection is determined by the chronological order in which the written confirmation is made.

DELEGATE SPONSOR PACKAGE

NUMBER OF DELEGATES	15	25
Special rate per delegate (Exclusive of GST)	INR 4,500	INR 4,000
ADDITIONAL BENEFITS:		
Company Logo on conference backdrop		•
Company logo on conference website	•	•
Company logo on housekeeping slides	•	•
Company logo on conference booklet	•	•

DELEGATE REGISTRATION FEES (Exclusive of GST)	Regular Rate	Early-bird Rate *
Non-members	INR 7,500	INR 5,000
CFA® Program Candidates	INR 4,000	INR 3,000
CFA Institute Members	INR 3,000	INR 2,000

*Early bird discount ends after 10 August 2018

DEADLINES FOR ENROLLMENT AND SUBMISSION	
Enrollment in sponsorship package	1 August 2018 (Wed)
Submission of company logo and description	3 August 2018 (Fri)
Delegate details for complimentary delegate pass and working pass	15 August 2018 (Wed)
Cancellations are subject to a cancellation and handling charge of INR2,000	After 8 August 2018 (Wed)



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