



CFA Society
India

4TH INDIA WEALTH MANAGEMENT CONFERENCE

Wealth Management and the Leap Forward

Friday, 2 August 2019 | Taj Lands End, Mumbai

#INWealth

Hosted with CFA Institute

SPONSORSHIP OPPORTUNITIES

EVENT OVERVIEW

Demographics, technology, and regulation have produced a new demand for client focused, goal oriented, advisory driven wealth services. Rapidly rising wealth levels have created an urgent need today to develop a deep and diverse wealth advisory talent pool. Are wealth practitioners ready? To address India's growing wealth management needs, CFA Society India is hosting its fourth annual full-day wealth management conference. Co-hosted with CFA Institute, it has the global connect and local reach to deliver practitioner-oriented learning. Come attend, network with experts, and learn!

About CFA Institute

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organisation is a champion of ethical behaviour in investment markets and a respected source of knowledge in the global financial community. Our aim is to create an environment where investors' interests come first, markets function at their best, and economies grow.

Top Employers of CFA® Charterholders Globally:

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

Top Employers of CFA® Charterholders in India:

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

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.*



CONTACTS

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

ALICIA CHAN

Manager, Sponsorship Programs & Society Institutional Engagement, APAC
+852 9858 8670 alicia.chan@cfainstitute.org

ANDY JENKINS

Director, Global Sponsorship Programs
+1 (434) 951-5594 andy.jenkins@cfainstitute.org

ARATI PORWAL

Director, Society Relations, India
arati.porwal@cfainstitute.in

DISTINGUISHED SPEAKERS FROM PAST CONFERENCES



Karan Bhagat

Founder, Managing Director, and
Chief Executive Officer
IIFL Investment Managers



Jean L.P. Brunel, CFA

Managing Principal
Brunel Associates LLC



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
of Economic Advisers (2001–2003)
Norman R. Bobins Professor of
Economics at the University of Chicago
Booth School of Business



Navneet Munot, CFA

Chief Investment Officer
SBI Funds Management Pvt. Ltd.



Vivek Pai, CFA

Managing Director and Principal Officer
Aroha Capital



William Poole

Distinguished Senior Fellow, Mises Institute
Distinguished Scholar in Residence, University
of Delaware
Senior Advisor, Merk Investments



XU SITAO

Chief Economist and Partner
Deloitte China



Meir Statman

Glenn Klimek Professor of Finance
Santa Clara University



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.

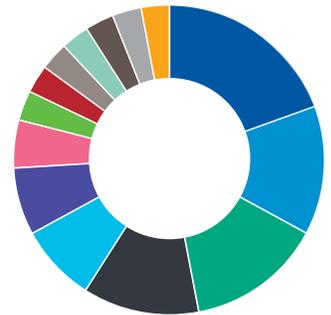
The demographic profile reflects data from the 2018 India Wealth Management Conference

320+ | Delegate Attendance

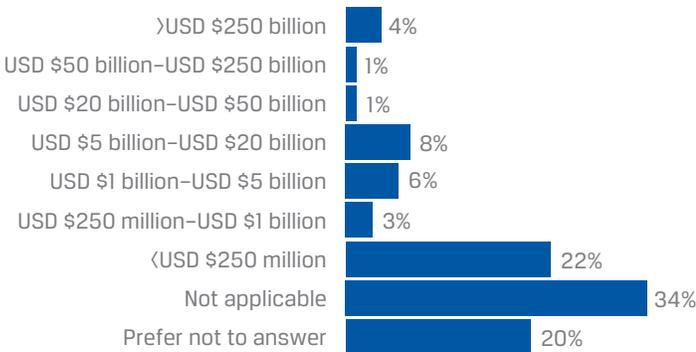
CFA Institute Membership Status



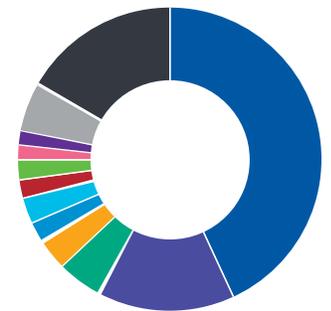
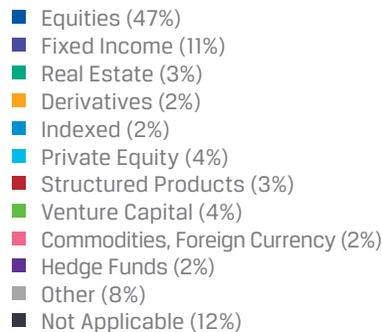
Delegate Occupation



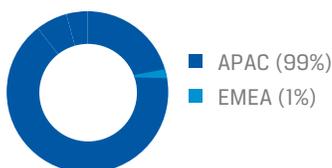
Employer AUM (USD)



Primary Investment Practice



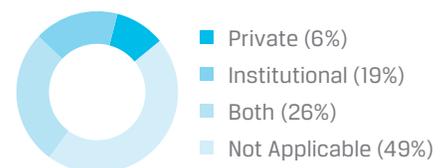
Region



Buy Side/Sell Side



Primary Asset Base



SPONSORSHIP AND 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

10 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.

SPONSORSHIP AND EXHIBIT OPPORTUNITIES	Premium Sponsor	Standard Exhibit
Quantity Available	3	3
Price (in INR, exclusive of GST)	₹5 lakhs	₹2 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 opt-in delegate mailing and email list	•	•
Onsite		
Tabletop exhibit space**	•	•
Recognition in onsite conference branding: table tents, 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
Complimentary passes: full access to the conference (for delegates and staff)	30	10
Announcement of firm by conference chairman during the conference	•	•
Post-event		
One-time use of the opt-in delegate mailing and email list	•	•

*Exclusive of GST.

**Exhibit selection order is determined by the sponsorship level and the chronological order in which signed agreements are submitted. Premium Sponsor is entitled to a 10% discount on any of the branding opportunities.



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BRANDING OPPORTUNITIES

LANYARD SPONSOR

₹4 lakhs* | 1 Available
16 Delegate Passes

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

DELEGATE BAG SPONSOR

₹4 lakhs* | 1 Available
16 Delegate Passes

As the Delegate Bag Sponsor, your firm enjoys high visibility by cobranding on each delegate's bag. Each delegate will receive a bag upon arrival containing all the relevant information. This opportunity is limited to one sponsor.

GIFT SPONSOR

₹2 lakhs* | 2 Available
8 Delegate Passes

As the Gift Sponsor, your firm enjoys exposure by giving out complimentary branded gifts or souvenirs to delegates.



Branding Opportunities	Lanyard Sponsor	Delegate Bag Sponsor	Gift Sponsor
Quantity Available	1	1	2
Price (in INR, exclusive of GST)	₹4 lakhs	₹4 lakhs	₹2 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 opt-in delegate mailing and email list	•	•	•
Onsite			
Cobranding on each delegate's lanyard	•		
Cobranding on each delegate's bag		•	
Complimentary branded gift to be distributed to delegates			•
Recognition in onsite conference branding: stage backdrop, housekeeping slides, sponsor section of conference program	•	•	•
Print advertisement in conference program	½ page	½ page	½ page
Complimentary passes: full access to the conference (for delegates and staff)	16	16	8
Post-event			
One-time use of the opt-in delegate mailing and email list	•	•	•

*Exclusive of GST. Premium Sponsor is entitled to a 10% discount on any of the branding opportunities.

BRANDING OPPORTUNITIES

NETWORKING LUNCH SPONSOR

₹3 lakhs* | 1 Available
12 Delegate Passes

The Networking Lunch Sponsor will enjoy brand exposure through signage and branded table tents during the networking lunch break.

REFRESHMENT BREAK SPONSOR

₹3 lakhs* | 1 Available
12 Delegate Passes

The Refreshment Break Sponsor will enjoy brand exposure through signage and branded table tents during the morning and the afternoon refreshment breaks.

RECHARGE SPONSOR

₹3 lakhs* | 1 Available
12 Delegate Passes

As the Recharge Sponsor, your firm's branding appears on the mobile device charging stations located in the exhibition area.



Branding Opportunities	Networking Lunch Sponsor	Refreshment Breaks Sponsor	Recharge Sponsor
Quantity Available	1	1	1
Price (in INR, exclusive of GST)	₹3 lakhs	₹3 lakhs	₹3 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 opt-in delegate mailing and email list	•	•	•
Onsite			
Exclusive branding at the networking luncheon	•		
Exclusive branding at the morning and the afternoon refreshment breaks		•	
Branding on mobile device charging units			•
Recognition in onsite conference branding: stage backdrop, housekeeping slides, sponsor section of conference program	•	•	•
Print advertisement in conference program	½ page	½ page	½ page
Complimentary passes: full access to the conference (for delegates and staff)	12	12	12
Post-event			
One-time use of the opt-in delegate mailing and email list	•	•	•

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DELEGATE SPONSOR PACKAGE

Number of Delegates	15	25
Special rate per delegate (Exclusive of GST)	₹4,500	₹3,500
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*
CFA Institute members	₹3,000	₹2,000
CFA® Program candidates	₹4,000	₹3,000
Nonmembers	₹7,500	₹5,000

*Early bird discount ends on 24 June 2019.

Deadlines for Enrollment and Submission	
Enrollment in sponsorship package	3 July 2019 (Wed)
Submission of company logo and description	5 July 2019 (Fri)
Delegate details for complimentary delegate pass and working pass	17 July 2019 (Wed)
Cancellations are subject to a cancellation and handling charge of ₹2,000	After 17 July 2019 (Wed)