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

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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  
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.
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

- Member (60%)
- Non-member (40%)

Employer AUM (USD)

- USD $250 billion or more: 4%
- USD $50 billion–USD $250 billion: 1%
- USD $20 billion–USD $50 billion: 1%
- USD $5 billion–USD $20 billion: 8%
- USD $1 billion–USD $5 billion: 6%
- USD $500 million–USD $1 billion: 3%
- Not applicable: 22%
- Prefer not to answer: 34%

Delegate Occupation

- Portfolio Manager (22%)
- Financial Adviser (3%)
- Chief-Level Executive (10%)
- Investment Banking Analyst (3%)
- Research Analyst (10%)
- Consultant (9%)
- Strategist (3%)
- Corporate Financial Analyst (8%)
- Private Banker (6%)
- Relationship Manager (5%)
- Manager of Managers (4%)
- Risk Manager (3%)
- Trader (4%)
- Others (10%)

Primary Investment Practice

- Equities (47%)
- Fixed Income (11%)
- Real Estate (3%)
- Derivatives (2%)
- Indexed (2%)
- Private Equity (4%)
- Structured Products (3%)
- Venture Capital (4%)
- Commodities, Foreign Currency (2%)
- Hedge Funds (2%)
- Other (8%)
- Not Applicable (12%)

Region

- APAC (99%)
- EMEA (1%)

Buy Side/Sell Side

- Buy Side (36%)
- Sell Side (20%)
- Both (14%)
- Neither (30%)

Primary Asset Base

- Private (6%)
- Institutional (19%)
- Both (26%)
- Neither (30%)
- Not Applicable (49%)

CFA Society India
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.

<table>
<thead>
<tr>
<th>SPONSORSHIP AND EXHIBIT OPPORTUNITIES</th>
<th>Premium Sponsor</th>
<th>Standard Exhibit</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quantity Available</strong></td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td><strong>Price (in INR, exclusive of GST)</strong></td>
<td>₹5 lakhs</td>
<td>₹2 lakhs</td>
</tr>
<tr>
<td><strong>Deliverables</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Pre-event</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital recognition on the conference webpage supporter section</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Recognition in promotional emails and/or print advertisements</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>One-time use of the opt-in delegate mailing and email list</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td><strong>Onsite</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tabletop exhibit space**</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Recognition in onsite conference branding: table tents, event directional signage</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Recognition in onsite conference branding: stage backdrop, housekeeping slides, sponsor section of conference program</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Marketing collateral (one piece) included with delegate conference materials</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Print advertisement in conference program</td>
<td>1 page</td>
<td>½ page</td>
</tr>
<tr>
<td>Complimentary passes: full access to the conference (for delegates and staff)</td>
<td>30</td>
<td>10</td>
</tr>
<tr>
<td>Announcement of firm by conference chairman during the conference</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td><strong>Post-event</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>One-time use of the opt-in delegate mailing and email list</td>
<td>•</td>
<td>•</td>
</tr>
</tbody>
</table>

*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.
## 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.

<table>
<thead>
<tr>
<th>Branding Opportunities</th>
<th>Lanyard Sponsor</th>
<th>Delegate Bag Sponsor</th>
<th>Gift Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quantity Available</strong></td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td><strong>Price (in INR, exclusive of GST)</strong></td>
<td>₹4 lakhs</td>
<td>₹4 lakhs</td>
<td>₹2 lakhs</td>
</tr>
</tbody>
</table>

### 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

#### 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

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

<table>
<thead>
<tr>
<th>Branding Opportunities</th>
<th>Networking Lunch Sponsor</th>
<th>Refreshment Break Sponsor</th>
<th>Recharge Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity Available</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Price (in INR, exclusive of GST)</td>
<td>₹3 lakhs</td>
<td>₹3 lakhs</td>
<td>₹3 lakhs</td>
</tr>
<tr>
<td>Deliverables</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Pre-event</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital recognition on the conference webpage supporter section</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Recognition in promotional emails and/or print advertisements</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>One-time use of the opt-in delegate mailing and email list</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td><strong>Onsite</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exclusive branding at the networking luncheon</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exclusive branding at the morning and the afternoon refreshment breaks</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Branding on mobile device charging units</td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Recognition in onsite conference branding: stage backdrop, housekeeping slides, sponsor section of conference program</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Print advertisement in conference program</td>
<td>½ page</td>
<td>½ page</td>
<td>½ page</td>
</tr>
<tr>
<td>Complimentary passes: full access to the conference (for delegates and staff)</td>
<td>12</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td><strong>Post-event</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>One-time use of the opt-in delegate mailing and email list</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
</tbody>
</table>

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## DELEGATE SPONSOR PACKAGE

<table>
<thead>
<tr>
<th>Number of Delegates</th>
<th>15</th>
<th>25</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Special rate per delegate</strong>&lt;br&gt;(Exclusive of GST)</td>
<td>₹4,500</td>
<td>₹3,500</td>
</tr>
<tr>
<td><strong>Additional Benefits</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company logo on conference backdrop</td>
<td></td>
<td>●</td>
</tr>
<tr>
<td>Company logo on conference website</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Company logo on housekeeping slides</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Company logo on conference booklet</td>
<td>●</td>
<td>●</td>
</tr>
</tbody>
</table>

### Delegate Registration Fees (Exclusive of GST)

<table>
<thead>
<tr>
<th></th>
<th>Regular Rate</th>
<th>Early-bird Rate*</th>
</tr>
</thead>
<tbody>
<tr>
<td>CFA Institute members</td>
<td>₹3,000</td>
<td>₹2,000</td>
</tr>
<tr>
<td>CFA® Program candidates</td>
<td>₹4,000</td>
<td>₹3,000</td>
</tr>
<tr>
<td>Nonmembers</td>
<td>₹7,500</td>
<td>₹5,000</td>
</tr>
</tbody>
</table>

*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) |

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