

25th ANNUAL GIPS® STANDARDS *VIRTUAL* CONFERENCE

26–27 October 2021

SPONSORSHIP OPPORTUNITIES



CFA Institute®
Global Investment
Performance Standards



CONFERENCE OVERVIEW

THE MUST-ATTEND PERFORMANCE STANDARDS EVENT

A premier event for performance, investment, and compliance professionals from both investment management firms and asset owners to learn about the newest developments with the Global Investment Performance Standards (GIPS®).

This year's virtual conference will feature sessions on ESG performance, the SEC Marketing Rule, and manager selection and oversight.

Join us to hear from industry experts and network with industry colleagues.

CONFERENCE OVERVIEW

THE SCHEDULE

Tuesday 26 October

11:00 am – 12:15 pm ET
Opening Remarks & Session 1

12:15 pm – 1:15 pm ET
Session 2

1:15 pm – 1:30 pm ET
Break

1:30 pm – 2:30 pm ET
Session 3

2:30 pm – 2:45 pm ET
Break

2:45 pm – 3:45 pm ET
Session 4

3:45 pm – 4:00 pm ET
Closing Remarks

4:00 pm – 5:00 pm ET
Social Activity

Wednesday 27 October

10:35 am – 10:55 am ET
Sponsored Breakout Sessions

11:00 am – 12:15 pm ET
Opening Remarks & Session 5

12:15 pm – 1:15 pm ET
Session 6 (Part 1)

1:15 pm – 1:30 pm ET
Break

1:30 pm – 2:30 pm ET
Session 6 (Part 2)

2:30 pm – 2:35 pm ET
Short Break

2:35 pm – 3:35 pm ET
Session 7

3:35 pm – 3:45 pm ET
Break

3:45 pm – 4:45 pm ET
Session 8

4:45 pm – 5:00 pm ET
Closing Remarks

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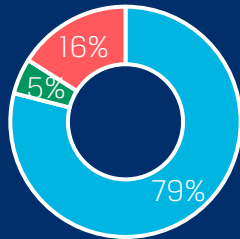
4:45 pm – 5:00 pm ET
Closing Remarks

24TH ANNUAL GIPS® STANDARDS VIRTUAL CONFERENCE

ATTENDEE PROFILE: 613 DELEGATES

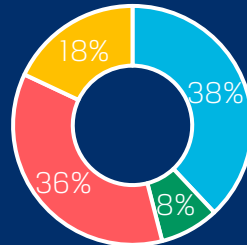
Last year, our delegates were primarily investment performance, risk, and compliance professionals who worked for investment management firms and institutional asset owners. Overall delegate representation included investment managers (traditional and alternative), asset owners, audit firms, consulting firms, software providers, and regulators.

Region



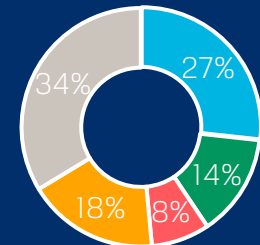
■ Americas ■ Asia Pacific ■ EMEA

Primary Asset Base



■ Institutional ■ Private/Individual
■ Both ■ N/A

Investment Focus

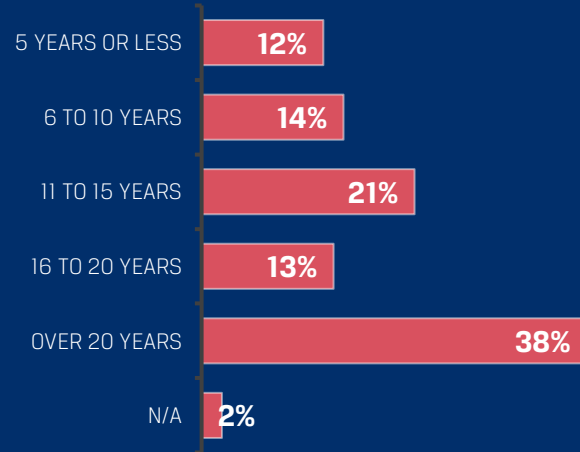


■ Equities ■ Fixed Income
■ Generalist ■ Other
■ N/A

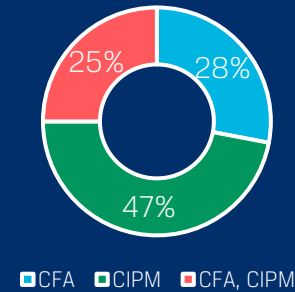
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Years in the Industry



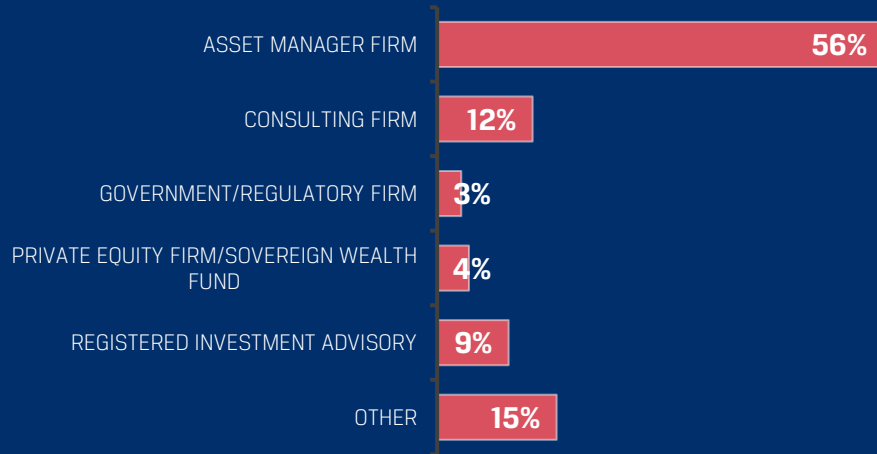
CFA Institute Designations



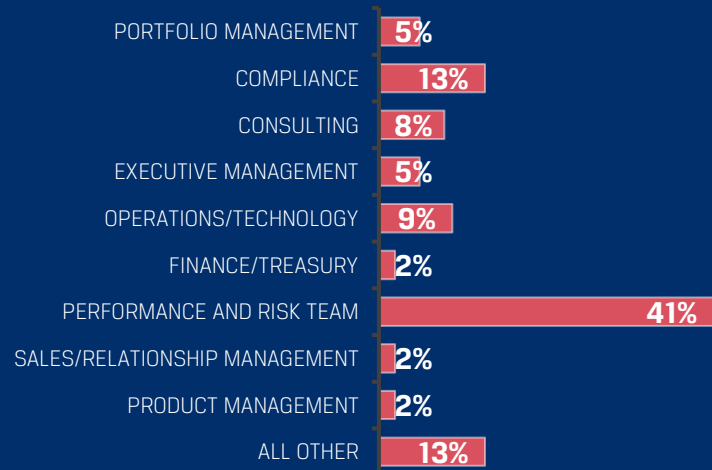
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Industry



Role Type



SPONSORSHIP OPPORTUNITIES

A BOLD SPONSORSHIP MODEL

THOUGHT LEADERSHIP

- Position your firm as an industry leader
- Promote speakers as industry topic experts

BRAND AWARENESS

- Create brand familiarity
- Promote products, services and solutions
- Share content and research

PURPOSEFUL ENGAGEMENT

- Generate qualified leads
- Network with prospects
- Create new business opportunities
- Data & Analytics reporting for effective follow-ups

SPONSORSHIP OPPORTUNITIES

AFFILIATE SPONSORSHIP

US \$5,000

This base-level sponsorship recognizes your firm as a supporter of the event and includes an extensive list of features that promotes your firm's brand along with your firm's products and services to our conference attendees.

The main feature of this opportunity is a customized Sponsor Profile Page that allows the sponsoring firm to upload their content (videos, pdfs, etc.) for conference attendees. The "Meet Now" and "Schedule" function allows attendees to easily schedule one-to-one meetings (or one-to-many) within the virtual platform for video conferencing.

Attendee List

Branding

Conference Access

Pre-Event Promotions

Sponsor Logo Recognition

Sponsor Profile Page

SPONSORSHIP OPPORTUNITIES

AFFILIATE SPONSORSHIP

Attendee List

- 3-time use of opt-in attendee list
- Provided 1-week prior to event, 1-day prior to event, and 2-3 days post event
- Expected attendance: 600+ delegates

Branding

- Logo on conference website
- Opportunity to submit a custom leaderboard challenge

Conference Access

- 5 complimentary registrations
- Additional registrations can be purchased at the discounted member rate

Data Analytics

- Provided within 5 days post-event
- How many attendees came to the event
- How many attendees watched each live general session
- Collect contact information for attendees who visit your [Sponsor Profile Page](#)
- Sponsor Profile Page performance report

Pre-Event Promotions

- Sponsor recognition in pre-event promotional communications

Sponsor Logo

- Logo located in the "Sponsors" section of the virtual platform
- Clicking on the Sponsor Logo directs attendees to your firm's [Sponsor Profile Page](#)

Sponsor Profile Page

- Fully branded page
- Up to 3 videos
- Up to 4 PDF downloads
- Links to social media handles and company website
- Chat/messaging feature
- Video conferencing and scheduling functionality

SPONSORSHIP OPPORTUNITIES

ADD-ON OPPORTUNITIES

Elevate your firm's brand presence above the Affiliate Sponsorship with consideration of our separately priced upgrade options and/or add-on sponsorship opportunities.

Choose from our selection of add-on sponsorship opportunities to maximize your ROI by increasing engagement and ensuring attendees connect with your brand's thought leadership, products, and services.

Featured Sponsor

Content Session Sponsorship

Breakout Session Sponsorship

Sponsored Commercials

Sponsored Push Notification

Social Activity Sponsorship

SPONSORSHIP OPPORTUNITIES

ADD-ON OPPORTUNITIES

Featured Sponsor

US \$2,500 (Limited to 3 sponsors)

Maximize brand visibility and drive traffic to your Sponsor Profile Page by appearing in the Featured Sponsors section located on the virtual platform homepage. This opportunity includes a rotating banner ad, also displayed on the virtual platform homepage.

Includes:

- Firm logo in Featured Sponsors section of the virtual platform homepage
- Rotating banner ad on the virtual platform homepage

SPONSORSHIP OPPORTUNITIES

ADD-ON OPPORTUNITIES

Breakout Session Sponsorship

US \$3,500 (Limited to 2 sponsors)

Submit a 20-minute pre-recorded or host a 20-minute live breakout session for delegates to attend. Breakout sessions are concurrent and will occur 30-minutes prior to the start of Day 2 programming. Breakout sessions will also be featured in the on-demand section of the virtual platform, post conference.

Includes:

- Dedicated 20-minute breakout session
- Performance metrics

Content Session Sponsorship

US \$1,500 (Limited to 6 sponsors)

Company name used to introduce session and mentioned within session as the exclusive session sponsor.

Includes:

- Branding on session description page
- Audible recognition by session moderator
- Brand recognition during live session

SPONSORSHIP OPPORTUNITIES

ADD-ON OPPORTUNITIES

Sponsored Commercial

US \$1,000 (Limited to 12 sponsors)

Air a 30-second commercial during the transition breaks between sessions. Firms may purchase multiple slots to increase commercial length and/or frequency.

Includes:

- (1) 30-second commercial video

Sponsored Push Notification

US \$500 (Limited to 6 sponsors)

Gain more visibility by sending a custom message through the virtual platform encouraging attendees to visit your sponsor profile page.

Includes:

- Single push notification with message and hyperlink to Sponsor Profile Page

SPONSORSHIP OPPORTUNITIES

ADD-ON OPPORTUNITIES

Social Activity Sponsorship

US \$5,000 (Limited to 1 sponsor)

Capping off day 1 of programming, there will be a social activity for all attendees to participate. This year's social activity will be a Virtual Escape Room. This 1-hour activity will recognize one firm as the sponsor and will allow the sponsoring firm the opportunity to award branded prizes to the winning team.

Includes:

- Audible mention in the introduction of the social activity
- Sponsor message included in the post activity email
- Sponsor logo featured on all team photos
- List of attendees who participated in the social activity
- Recognition on conference website as the Social Activity Sponsor

JOIN US!

To learn more about our sponsorship opportunities, contact:

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