

# Alpha Summit



Think beyond the horizon



## ALPHA SUMMIT SERIES

2022 Sponsorship Opportunities

CFA Institute is the world's leading voice on how the investment profession serves the ultimate benefit of society.

Alpha Summit is a multi-part series of content-driven events from CFA Institute, where investment professionals will learn from top investment, economic and business changemakers about the issues that will define the future of our industry, our careers and our lives.

**INSIGHT**

**INSPIRATION**

**INTERACTION**

# OVERVIEW

## Think Beyond the Horizon

Celebrating the 75th anniversary of our annual conference, CFA Institute delivers Alpha Summit – a multi-part series of content driven events designed to provide insights to spark new idea for broadening industry knowledge, deepening client relationships, and elevating career objectives.

Each conference in the Alpha Summit event series is designed to deliver knowledge, information and professional connections to help our audience prepare for and drive the future of the investment industry.

### 2022 Alpha Summit Event Series

#### Alpha Summit APAC

10-11 February 2022  
Virtual

#### Alpha Summit EMEA

15-16 February 2022  
Virtual

#### Alpha Summit Global

17-19 May 2022  
Virtual

# CONTENT

Alpha Summit brings together practitioners, C-suite, and thought leaders to gain and share insights into the latest investment trends with a lens on how to drive positive change in the world and demonstrate finance as a force for good.

The event series will deliver a dynamic agenda of speakers sharing their valuable insights on impactful topics within five critical themes that have emerged from in-depth work of global advisory and research teams working with CFA Institute.

### Themes and topics

- Opportunities and Responsibilities with Sustainable Investing
- Excelling in a Post-Pandemic World
- Harnessing the Benefits of Innovation and Technology
- The Future of Capital Markets Today
- Advancements for the Investment Management Professional

# AUDIENCE PROFILE

Alpha Summit event series is designed to connect the investment management industry – both CFA Institute members and beyond.

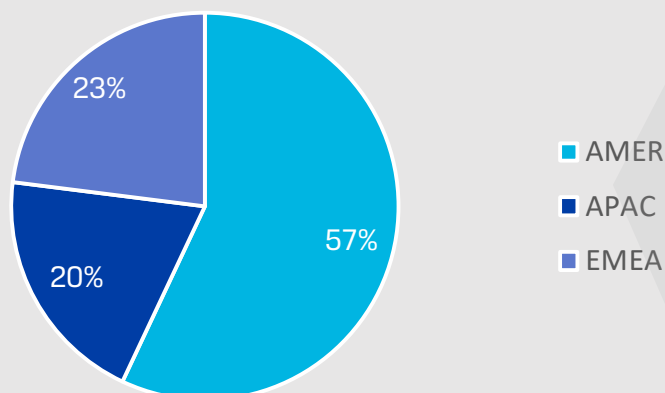
Our conference delegates are primarily portfolio managers and institutional analysts who have worked in the investment industry (mostly equity and debt securities) for more than 11 years.

Firms represented include investment counselors and banks, pension funds, endowments and foundations, brokers and dealers, insurance companies, commercial banks, and related businesses.

**19** *Members' Average Years in the Industry*

**11** *Members' Average Years with the Charter*

## Membership by Region



## Investment Focus

- Equities (30%)
- Fixed Income (16%)
- Private Equity (6%)
- Real Estate (4%)

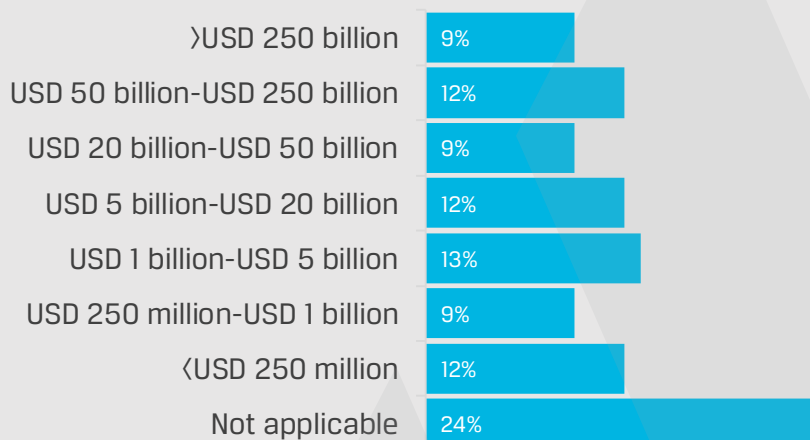
## Top Firm Types

- Asset Management (38%)
- Commercial Bank (9%)
- Investment Bank (8%)
- Private Wealth Management (8%)

## Top Job Roles

- Portfolio Manager (19%)
- Research Analyst (15%)
- C-Suite (7%)
- Wealth Manager (6%)

## Employer Assets Under Management



# SPONSORSHIP TYPES

Step into the spotlight of Alpha Summit with your brand as an integral part of the exciting experience we've built for our audience of engaged investment professionals.

## SPONSORSHIP PACKAGES

Our sponsorship packages are designed to give greater access to a wider array of benefits to meet their needs. With greater scale from virtual attendance, our sponsorship opportunities provide additional integration opportunities that drive more value and are unique through structured benefit packages.

### Alpha Summit Series Sponsor – A Strategic Partnership



#### **SERIES SPONSOR**

- The highest profile opportunity that offers the widest array of assets across all series events – Alpha Summit APAC, Alpha Summit EMEA, and Alpha Summit GLOBAL
- Opportunity to maximize brand awareness and share thought leadership across all regions and events

### Event-Specific Sponsorships



#### **TITLE SPONSOR**

- A more focused opportunity targeting specific regions
- Opportunity to strengthen brand awareness and share thought leadership at a selected conference – Alpha Summit APAC, Alpha Summit EMEA, and Alpha Summit GLOBAL



#### **ASSOCIATE SPONSOR**

- An accessible opportunity targeting specific regions
- Opportunity to build brand awareness and promote products and services at selected conference – Alpha Summit APAC, Alpha Summit EMEA, and Alpha Summit GLOBAL



# SPONSORSHIP

## ALPHA SUMMIT SERIES SPONSOR

The highest profile opportunity with the Alpha Summit series offering the widest array of assets across all series events.

This package maximizes brand awareness for your firm, keeping it top of mind among Alpha Summit's global audience and establishing your brand as a committed partner of CFA Institute and the financial investment industry overall.

The Series Sponsor will receive unique assets across all three [Alpha Summit](#) events. Some hallmark benefits include logo/name recognition in series marketing and promotional materials, a premium speaking opportunity at all three events, and the ability to leverage CFA Institute marks/logos.

This package is an exclusive opportunity limited to one firm.

## SOLD OUT

This exclusive package allows your firm to:

- Showcase thought leadership
- Maximize exposure
- Generate top of mind awareness
- Showcase products and services
- Recruit top talent
- Integrate authentically with the CFA Institute brand
- Access key stakeholders and decision makers
- Host invite-only events
- Generate qualified leads
- Engage in high-touch engagement opportunities
- Heighten brand reputation and affinity

SPONSORSHIP PACKAGE	SERIES SPONSOR
Price	USD 130,000
<b>EXCLUSIVITY</b>	
Exclusive sponsorship	<input checked="" type="checkbox"/>
<b>USE OF LIKENESS</b>	
Permissions to use CFA Institute marks, logos, and designation in sponsor-controlled activation	<input checked="" type="checkbox"/>
<b>DRIVE AWARENESS</b>	
Recognition in dedicated press release	<input checked="" type="checkbox"/>
Inclusion in press releases and access to media opportunities	<input checked="" type="checkbox"/>
Recognition in paid advertising	<input checked="" type="checkbox"/>
Recognition in promotional emails	premium
Recognition in social media posts	<input checked="" type="checkbox"/>
<b>THOUGHT LEADERSHIP</b>	
(1) Premium speaking opportunity – Content Session Panelist (live)	per event
(1) Breakout session speaking opportunity – 30-minute virtual presentation occurring after day 1 or before start of day 2 conference programming (live or pre-recorded)	per event
(1) Breakout session speaking opportunity – 20-minute virtual presentation hosted in on-demand section of virtual conference platform	per event
Opportunity for representative to participate in day 1 closing remarks	per event
<b>BRANDING &amp; PROMOTION</b>	
Logo featured on Alpha Summit Series homepage	<input checked="" type="checkbox"/>
Logo/description on Alpha Summit event webpage	per event
Audible recognition of partnership by host moderator	per event
Logo on virtual event platform homepage	per event
30-second sponsored commercial to air between content sessions	3 per event

# SPONSORSHIP

SPONSORSHIP PACKAGE	SERIES SPONSOR
Price	USD 130,000
<b>ACTIVATION &amp; LEAD GENERATION</b>	
Opt-in virtual attendee email list – two-time use	per event
Products and services featured in pre-event email to registered attendees	per event
Sponsor profile page to host virtual sponsor assets (videos, links, banners, documents)	per event
Sponsor profile page included in post-event virtual experience	per event
Post-event summary report (with performance metrics)	per event
<b>CONFERENCE PASSES</b>	
Virtual Premium complimentary registrations for Alpha Summit GLOBAL	20
Opportunity to purchase additional conference passes at a discount	<input checked="" type="checkbox"/>



# Alpha Summit GLOBAL

17-19 May 2022 | Virtual

We're delivering you the one-of-kind experience that only CFA Institute can give you. The content you care about. The speakers who matter. The opportunity to connect with likeminded investment professionals. We bring to life our global event series with a conference that will compel you to **think beyond the horizon.**

We can't predict the future, but we can prepare for it and help shape it. Over three days, the Alpha Summit Global event offers networking opportunities surrounding dynamic content sessions, focusing on the investment industry's biggest challenges and most compelling trends.

Unique access to industry luminaries and thought leaders will provide insights around our five main themes. This experience will connect you with the content you need to know, as – together – we set our vision on shaping the future of our profession – our industry – our lives.



## GLOBAL

### TITLE SPONSOR

A more focused option for targeting certain regions, this package offers firms the opportunity to be the Title Sponsor for one of the three annual Alpha Summit series events.

The Title Sponsor opportunity allows firms to generate increased brand awareness and promote their thought leadership among a specific subset of our audience.

Title Sponsors receive unique sponsorship assets specific to [Alpha Summit GLOBAL](#). Some hallmark benefits include logo/name recognition in event marketing and promotional materials, a premium speaking opportunity, the ability to leverage CFA Institute's marks/logos across the event.

This package is available for up to four partners (per event).

#### This premier package allows your firm to:

- Showcase thought leadership
- Maximize exposure
- Generate top of mind awareness
- Showcase products and services
- Recruit top talent
- Access key stakeholders and decision makers
- Generate qualified leads
- Engage in high-touch engagement opportunities
- Heighten brand reputation and affinity

## GLOBAL

## ASSOCIATE SPONSOR

The most accessible sponsorship package available, offering firms the opportunity to affiliate with one of the three Alpha Summit series events for a lesser financial commitment.

The Associate Sponsorship allows firms to generate leads, access to key stakeholders and decision makers, and the ability to strengthen its brand reputation amongst our conference delegates.

Associate Sponsors receive sponsorship assets specific to [Alpha Summit GLOBAL](#). Most hallmark benefits include support for activation & lead generation and branding & promotion for the event.

### This premier package allows your firm to:

- Showcase thought leadership
- Recruit top talent
- Integrate authentically with the CFA Institute brand
- Generate qualified leads
- Heighten brand reputation and affinity

# SPONSORSHIP

## GLOBAL

SPONSORSHIP PACKAGE	TITLE SPONSOR	ASSOCIATE SPONSOR
Price	USD 25,000	USD 10,000
<b>USE OF LIKENESS</b>		
Permissions to use CFA Institute marks, logos, and designation in sponsor-controlled activation	<input checked="" type="checkbox"/>	
<b>DRIVE AWARENESS</b>		
Recognition in promotional emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recognition in social media posts	<input checked="" type="checkbox"/>	
<b>THOUGHT LEADERSHIP</b>		
(1) Premium speaking opportunity – Content Session Panelist (live)	<input checked="" type="checkbox"/>	
(1) Breakout session speaking opportunity – 20-minute virtual presentation hosted in on-demand section of virtual event platform	<input checked="" type="checkbox"/>	
<b>BRANDING &amp; PROMOTION</b>		
Logo/description on Alpha Summit event webpage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Audible recognition of partnership by host moderator	<input checked="" type="checkbox"/>	
Logo on virtual event platform homepage	<input checked="" type="checkbox"/>	
30-second sponsored commercial to air between content sessions	2	1
<b>ACTIVATION &amp; LEAD GENERATION</b>		
Opt-in virtual attendee email list – two-time use	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sponsor profile page to host virtual sponsor assets (videos, links, banners, documents)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sponsor profile page included in post-event virtual experience	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Post-event summary report (with performance metrics)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>CONFERENCE PASSES</b>		
Virtual Premium complimentary registrations	15	8
Opportunity to purchase additional conference passes at a discount	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## ABOUT CFA INSTITUTE

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion of ethical behavior 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 economics grow. There are more than 170,000 CFA® charterholders worldwide in 164 markets.

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.

## BECOME A SPONSOR

To secure any of these opportunities and gain access to investment professionals attending Alpha Summit, please contact us at [sponsorshipprograms@cfainstitute.org](mailto:sponsorshipprograms@cfainstitute.org).