

Alpha Summit

By CFA Institute

A Meeting of the Minds that Propels Finance Forward

Join us for a day of must-see TV, and learn how global finance professionals can change the industry – and the world – in unexpected ways

18 May 2021
cfainst.is/sponsor



SPONSORSHIP OPPORTUNITIES



CFA Institute

Conference Overview

A FINANCIAL BINGE WATCH

Brought to you by CFA Institute, Alpha Summit was made for global investment professionals to enjoy awe-inspiring, live conversations across diverse topics, led by changemakers in the industry.

With 73 years of conference excellence, transforming 2021 into the Alpha Summit will help inspire and set the tone for how investment professionals can change the industry – and the world – in unexpected ways.



CFA Institute

Conference Overview

A FINANCIAL BINGE WATCH

A “Must See” TV Format

Consumers crave good content — and when content is engaging, educational and inspiring, they will want to binge watch for hours. This inspired us to create a custom virtual platform to host CFA Institute’s own tv channel for 2021. It will be a day full of non-stop programming and will even feature a prime-time slot for APAC to enjoy during their business hours.

8 HOURS
the average amount of online content an American binge watches, per day



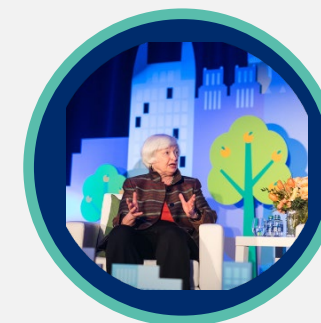
One Day
Multiple Segments
Non-Stop Content



100% Live
Conversational
Format



100% Original
Content from
Global Changemakers



Debut
Multiple Segments
Non-Stop Content



CFA Institute

Conference Overview

THE CONTENT

Alpha Summit Shows

This year’s Alpha Summit will feature broad segments (**shows**) that will make up the structure of the day. The individual topics or themes will be discussed by specific speakers and an accompanying format.

Changemakers	Trendmakers	Inspirers	Guardians	Visionaries	Career Developers
This show will feature speakers who are making change in the industry or world and/or discussing a topic that is focused on big, important issues.	This show will feature new thinking, new voices, new, trending topics, or a fresh take on a relevant industry topic or traditional approach/thinking.	This show will feature topics and speakers focused on inspiring creative or unique approaches to solving problems in the industry and world.	This show will feature speakers and topics that are focused on building, promoting, and leading with ethics and standards.	This show will feature varying perspectives and viewpoints on important and relevant industry topics.	This show will feature topics and speakers focused on the future of work and professional development to help professionals cultivate the skills they need to grow their careers and lead.



2020 CFA Institute (Virtual) Annual Conference

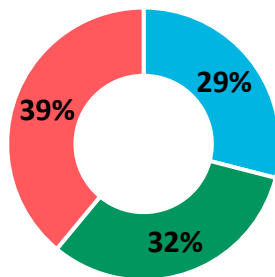
ATTENDEE PROFILE: 10,000+ DELEGATES

The Event by the Numbers

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 10 years.

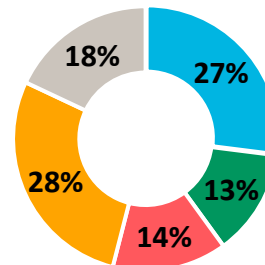
Firms represented include asset managers, investment counselors and banks, pension funds, endowments and foundations, brokers and dealers, insurance companies, commercial banks, and related businesses.

Primary Asset Base



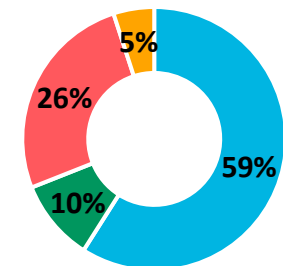
■ Institutional ■ Private/Individual ■ N/A

Primary Investment Practice



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

Region



■ Americas ■ Asia Pacific ■ EMEA ■ Unspecified

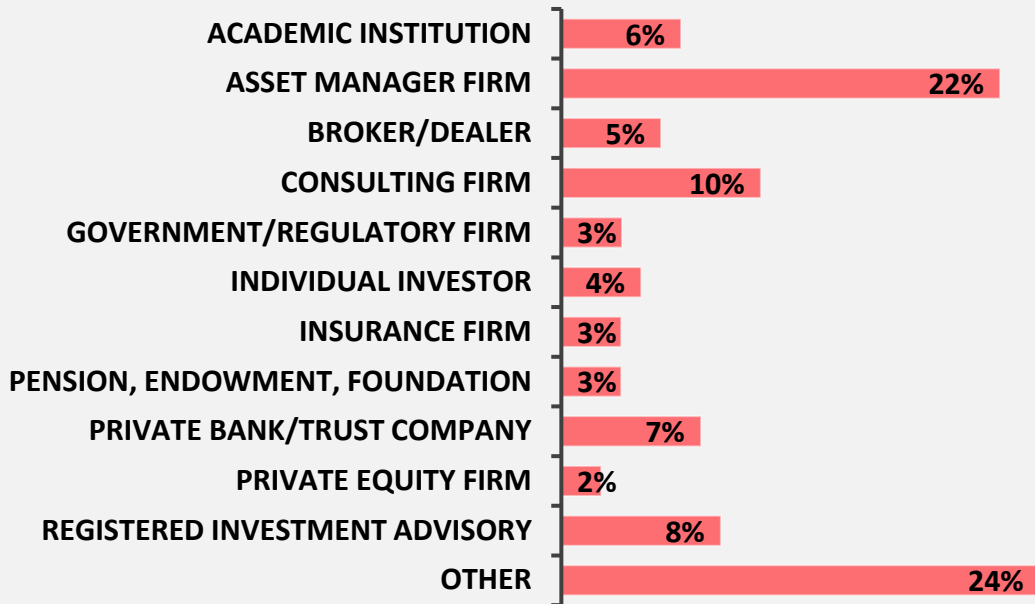


CFA Institute

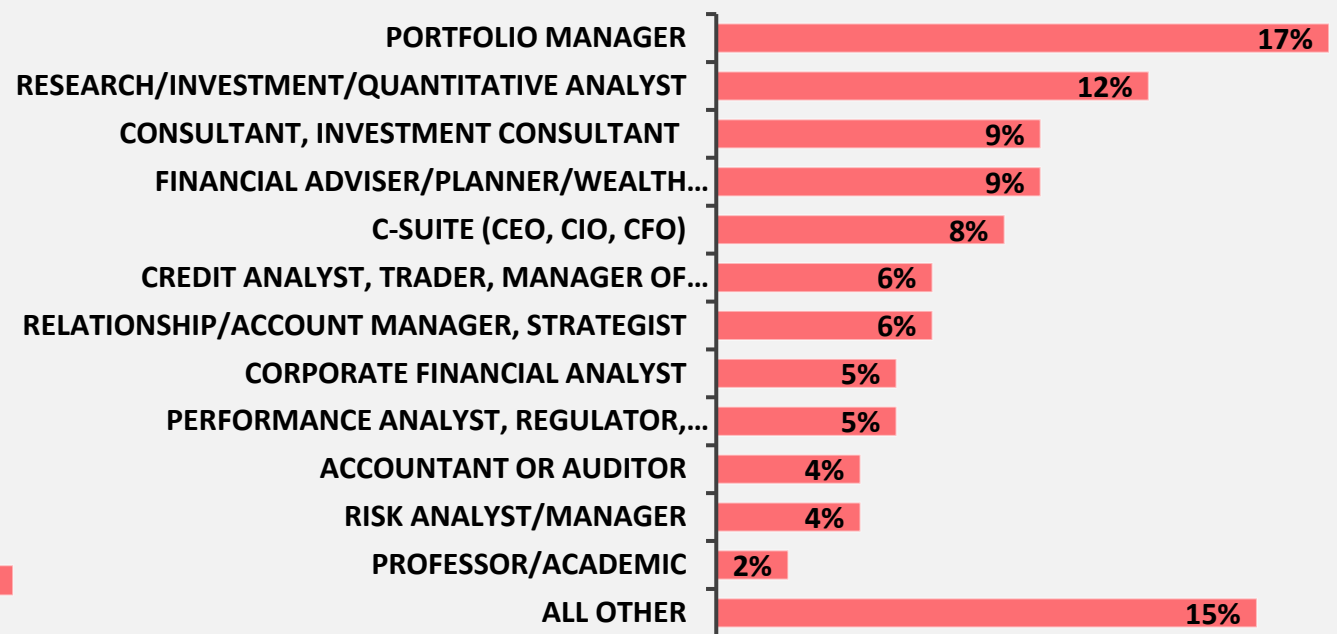
2020 CFA Institute (Virtual) Annual Conference

ATTENDEE PROFILE: 10,000+ DELEGATES

Industry



Occupation



CFA Institute

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



CFA Institute

Sponsorship Opportunities

AFFILIATE SPONSORSHIP

Affiliate Sponsorship (The “Base-Level Standard”)

US \$8,000

As our Alpha Summit **Affiliate Sponsor**, you will be a prominent member of our support group of partners. This level of partnership includes base level benefits that will get you noticed by our members and conference attendees world-wide.

Attendee List

Branding

Conference Access

Sponsor Logo Tile

Pre-Event Promotions

Sponsor Profile Page



CFA Institute

Sponsorship Opportunities

AFFILIATE SPONSORSHIP (CONTINUED)

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: 5,000 delegates

Branding

- Logo on conference landing page

Conference Access

- 3 complimentary registrations

Data Analytics

- Provided 14 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

Sponsor Logo Tile

- Quarter-size custom graphic with logo/tagline located in the “Partner Zone” section of the virtual platform
- Clicking on the Sponsor Logo Tile directs attendees to your firm’s [Sponsor Profile Page](#)

Pre-Event Promotions

- Sponsor recognition in up to 3 separate pre-event promotional communications

Sponsor Profile Page

- Fully branded page with center carousel images (up to 3) and custom branded background graphic
- Up to 3 videos
- Up to 4 PDF downloads
- Up to 3 polling questions
- Up to 3 team member photos, titles, contact information (email, phone, social)
- Links to social media handles and company website
- Public comment board to engage with attendees



CFA Institute

Sponsorship Opportunities

AFFILIATE SPONSORSHIP (CONTINUED)

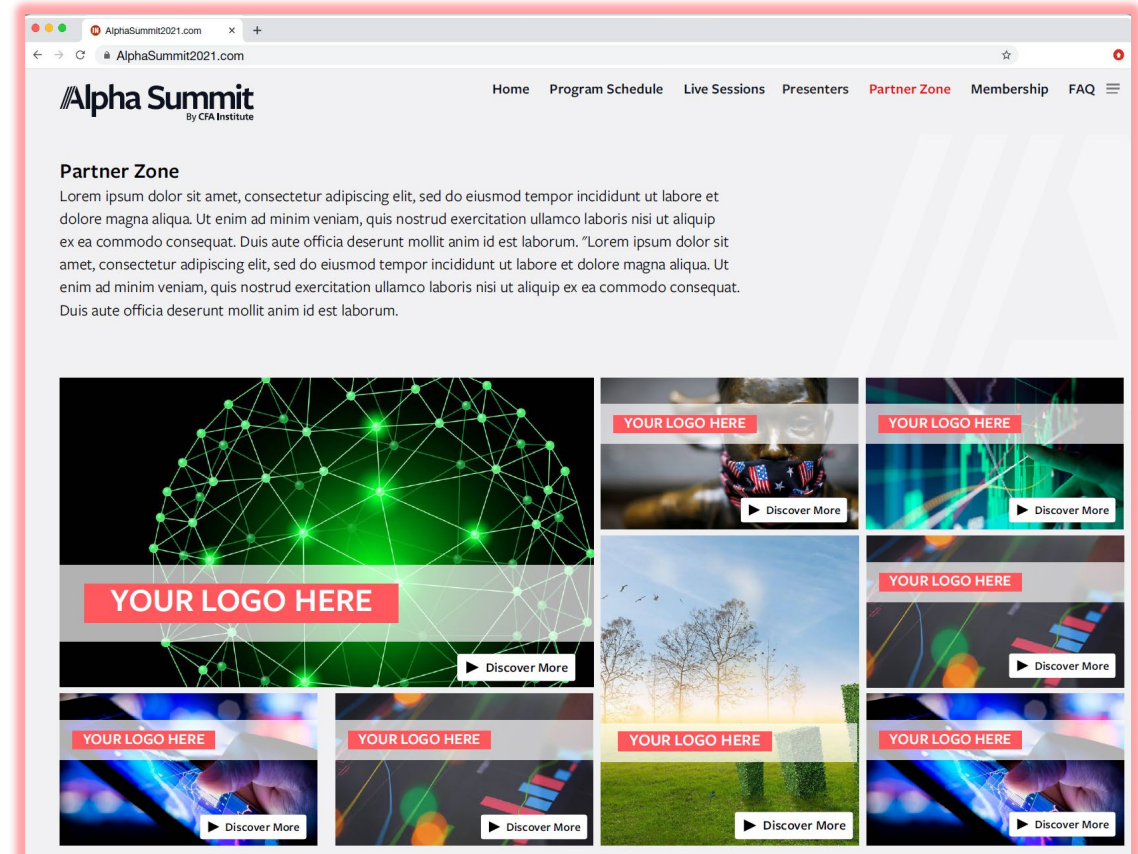
Sponsor Logo Tile

This will be featured on sponsor recognition page known as the **Partner Zone** within the event platform.

All of our sponsors will be recognized with a customized, visually appealing graphic tile to entice attendees to visit their **Sponsor Profile Page** to collect qualified leads.

Includes:

- Quarter-size custom graphic with logo/tagline located in the **Partner Zone** section of the virtual platform
- Clicking on the Sponsor Logo Tile directs attendees to your firm's **Sponsor Profile Page**
- Option to upgrade sponsor logo tile to half-size or full-size



CFA Institute

Sponsorship Opportunities

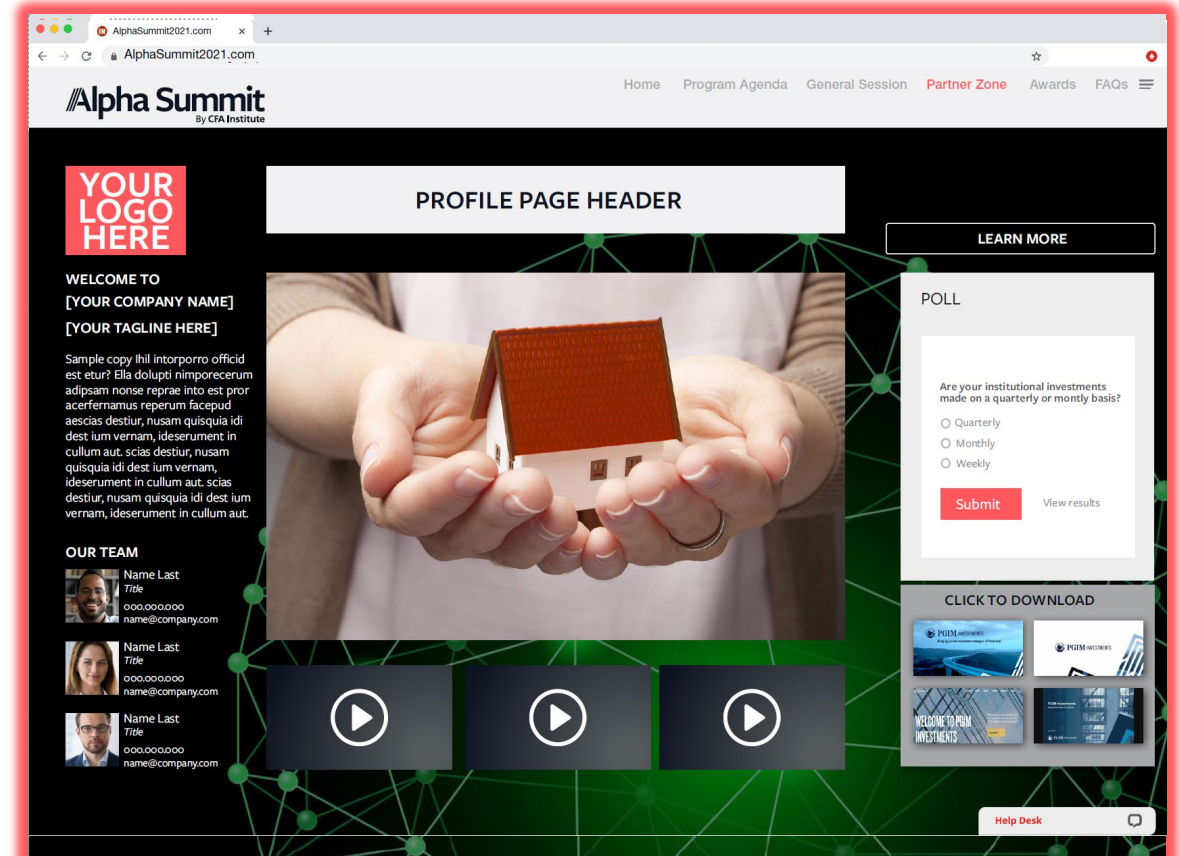
AFFILIATE SPONSORSHIP (CONTINUED)

Sponsor Profile Page

Within the **Partner Zone**, attendees will have direct access to a fully branded and curated page that represents your firm and its products and services.

Includes:

- Fully branded page with center carousal images (up to 3) and custom branded background graphic
- Up to 3 videos
- Up to 4 PDF downloads
- Up to 3 polling questions
- Up to 3 team member photos, titles, contact information (email, phone, social)
- Links to social media handles and company website
- Public comment board to engage with attendees



CFA Institute

Sponsorship Opportunities

ADD-ON OPPS

Affiliate Sponsorship + Add-On Opps

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

Choose from our selection of add-on sponsorship opportunities to increase audience engagement and ensure attendee connection to your brand's thought leadership, products, and services.

Episode Sponsorship

Sponsored Pop-up Notification

Episode Transition Sponsorship

Intermission Sponsorship

Sponsor Logo Tile: Upgrade



CFA Institute

Sponsorship Opportunities

ADD-ON OPPS

Episode Sponsorship

US \$7,500 (Limited to 13 sponsors)

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

Includes:

- On-screen naming at the opening of the segment
- On-screen naming during the segment

Upgrade Option: In-Episode Commercial (30 sec)

US \$2,500

Increase your episode sponsorship by airing a 30-second commercial during live segment for all viewers to see.

Includes:

- (1) 30-second commercial video (mid-episode)

Sponsored Pop-up Notification

US \$750 (Limited to 6 sponsors)

Timed billboards for attendees to see a short, branded message from your company immediately before live segments.

Includes:

- Single pop-up graphic with message and hyperlink to profile page



CFA Institute

Sponsorship Opportunities

ADD-ON OPPS

Episode Transition Sponsorship

US \$3,000 (Limited to 13 sponsors)

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

Includes:

- (1) 30-second commercial video

Intermission Sponsorship

US \$5,000 (Limited to 3 sponsors)

There will be three 10-minute intermission breaks scheduled during the program. Choose between airing passive content such as an informational video or active content such as a live or pre-recorded wellness related segment like yoga, meditation, mindfulness, etc.

Includes:

- (1) On-screen 10-minute pre-recorded video



CFA Institute

Sponsorship Opportunities

ADD-ON OPPS

Partner Zone



Sponsor Logo Tile: Upgrade

This upgrade provides your firm with a more visible graphic tile size upgrade on our Partner Zone landing page where your company branding, logo, and tag-line will be displayed.

Option 1: Half-Size Tile

US \$1,500

Includes:

Half-size custom graphic with logo/tagline on **Partner Zone** landing page

Option 2: Full-Size Tile

US \$3,000

Includes:

Full-size custom graphic with logo/tagline on **Partner Zone** landing page

*Quarter-size tile is included with Affiliate Sponsorship

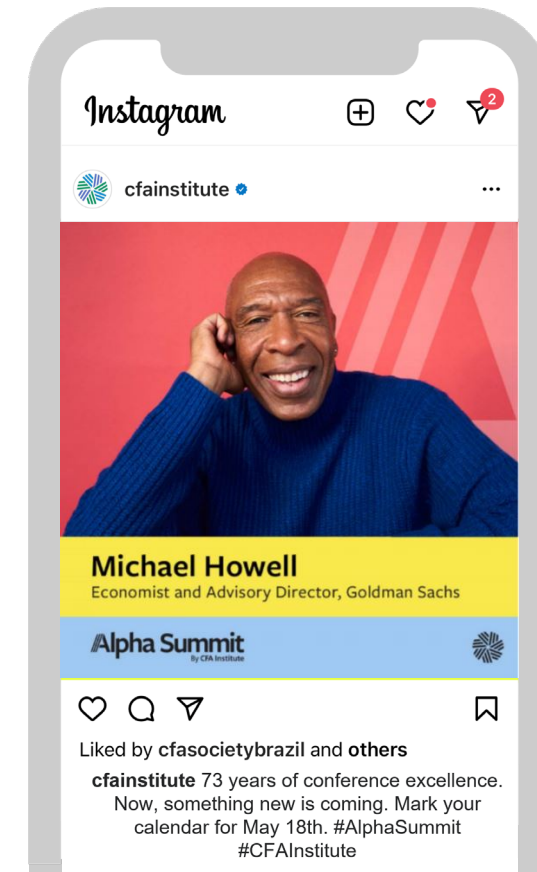


CFA Institute

Join Us!

To learn more about our sponsorship opportunities, contact:

Andy Jenkins
Senior Manager, Global Sponsorship Programs
+1 (434) 242-4204
andy.jenkins@cfainstitute.org



CFA Institute