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
Brought to you by CFA Institute, the 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.
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
Conference Overview

THE CONTENT

Six Shows with Accompanying of Episodes

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

<table>
<thead>
<tr>
<th>Change Makers</th>
<th>Trendmakers</th>
<th>Inspirers</th>
<th>Guardians</th>
<th>Visionaries</th>
<th>Career Developers</th>
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<tr>
<td>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.</td>
<td>This show will feature new thinking, new voices, new, trending topics, or a fresh take on a relevant industry topic or traditional approach/thinking.</td>
<td>This show will feature topics and speakers focused on inspiring creative or unique approaches to solving problems in the industry and world.</td>
<td>This show will feature speakers and topics that are focused on building, promoting, and leading with ethics and standards.</td>
<td>This show will feature varying perspectives and viewpoints on important and relevant industry topics.</td>
<td>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.</td>
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Episode #1 – Leadership in Addressing Climate Change
Episode #2 – Leadership Through COVID-19
Episode #3 – Fuel Your Inspiration

Episode #1 – Cryptocurrency
Episode #2 – AI for Good
Episode – Behavioral Finance

Episode #1 – Relevance Watch: The Collapse of Wirecard
Episode #2 – Impact Investing & Stakeholder Capitalism

Episode #1 – Geopolitics
Episode #2 – Policy in Action
Episode #3 – Pension Fund Perspective

Episode #1 – Leadership & Fostering Inclusion
Episode #2 – Future of Work
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.
## Attendee Profile: 10,000+ Delegates

### Industry
- Academic Institution: 6%
- Asset Manager Firm: 22%
- Broker/Dealer: 5%
- Consulting Firm: 10%
- Government/Regulatory Firm: 3%
- Individual Investor: 4%
- Insurance Firm: 3%
- Pension, Endowment, Foundation: 3%
- Private Bank/Trust Company: 7%
- Private Equity Firm: 2%
- Registered Investment Advisory: 8%
- Other: 24%

### Occupation
- Portfolio Manager: 17%
- Research/Investment/Quantitative: 12%
- Consultant, Investment Consultant: 9%
- Financial Adviser/Planner/Wealth: 9%
- C-Suite (CEO, CIO, CFO): 8%
- Credit Analyst, Trader, Manager of: 6%
- Relationship/Account Manager: 6%
- Corporate Financial Analyst: 5%
- Performance Analyst, Regulator: 5%
- Accountant or Auditor: 4%
- Risk Analyst/Manager: 4%
- Professor/Academic: 2%
- All Other: 15%
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**

**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.

Includes:

**Data Analytics**
- How many attendees came to the event
- How many attendees watched each live general session
- Collect contact information for attendees who visit your Profile Page
- Performance report

**Pre-Event Promotions**
- Sponsor recognition in up to 3 separate pre-event promotional communications

**Conference Access**
- 3 Complimentary registrations

**Branding**
- Full color logo on conference Home Page
- Full Color logo on Partner Zone landing page

**Attendee List**
- 3 time use of opt-in attendee list

**Profile Page**
- Fully branded page with center image and background graphic
- Up to 3 videos
- Up to 6 PDF downloads
- Up to 3 team member photos, titles, contact information (email, phone, social)
- Links to social media handles
- Company website link
- Chat/comment board and polling to engage with attendees

**Logo Tile**
- Quarter-size custom graphic with logo/tagline on Partner Zone landing page
Sponsorship Opportunities

AFFILIATE SPONSORSHIP

Partner Zone

This will be the featured sponsor recognition area within the event platform.

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

The preview option can be used to highlight features within your Sponsor Profile Page to encourage interaction.

Includes:
- Quarter-size custom graphic with logo/tagline on Partner Zone landing page
- Option to upgrade sponsor tile to half-size or full-size
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.

In order to view a sponsor’s profile page, attendees will be prompted to share their virtual business card to engage with content.

Includes:
- Fully branded page with center image and background graphic
- Up to 3 videos
- Up to 6 PDF downloads
- Up to 3 team member photos, titles, contact information (email, phone, social)
- Links to social media handles
- Company website link
- Chat/comment board and polling to engage with attendees
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.

- Content Contributor Sponsorship (Panelist Spot)
- Episode Sponsorship
- Sponsored Pop-up Notification
- Episode Transition Sponsorship
- Intermission Sponsorship
- Sponsor Logo Tile: Upgrade
Content Contributor Sponsorship (Panelist Spot)

US $12,000 (Limited to 3 sponsors)

A senior-level representative from your company will have an on-stage presence by serving as a panelist during in one of our exclusive live segments. This opportunity is available to organizations with demonstrated thought leadership in a specific topic area and will be a unique contributor to the content within a given segment.

Your speaker will be included in the development of the segment and participate live on the event day. This partnership also includes name and title mention throughout the segment.

Includes:

• 1 Executive panelist spot
• 2 Pre-program content strategy sessions
• Recorded session for future use
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
**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
Sponsorship Opportunities

ADD-ON OPPS

CFA Institute Alpha Summit
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
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