This year’s Wealth Management Conference will feature practitioner-oriented educational sessions across a broad spectrum of topics carefully chosen to meet the needs of those engaged in managing private wealth.

The Wealth Management Conference combines rigorous, investment-oriented sessions with sessions on tools and strategies important to private wealth management, including financial planning, practice management, and client relationship management. The conference draws a global audience and includes opportunities to network with other delegates, as well as a select group of relevant vendors.

Conference topic areas include the following:

• Private Wealth Management
• Standards, Ethics, and Regulations (SER)

We offer various sponsorship programs from premium sponsorships and exhibitor programs to branding and engagement opportunities.

To secure any of these opportunities and gain access to investment professionals attending the Wealth Management 2020 Conference, please contact:

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Global Sponsorship Programs
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**Tom Sours**
Associate Manager,
Sponsorship Programs
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CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion for ethical behavior in investment markets and a respected source of knowledge in the global financial community. The end goal: to create an environment where investors’ interests come first, markets function at their best, and economies grow. CFA Institute has more than 170,000 members in 164 countries and territories, including 165,000 CFA® charterholders, and 156 member societies.

Top employers of CFA Institute Members globally:
- Bank of America Merrill Lynch
- BlackRock
- BMO Financial Group
- HSBC
- JPMorgan Chase
- Morgan Stanley
- Royal Bank of Canada
- TD Bank Financial Group
- UBS
- Wells Fargo

CFA Society Seattle promotes the highest ethical standards and professional excellence within the local investment community. CFA Society Seattle is an association of local investment professionals consisting of portfolio managers, security analysts, Investment advisors and other financial practitioners, serving CFA charterholders and CFA Program candidates locally since 1974.

Top employers of CFA® charterholders in Seattle:
- Amazon.com, Inc.
- Bank of America Merrill Lynch
- BlackRock
- BMGI Group
- Davidson Companies
- Eaton Vance
- Goldman Sachs
- Microsoft Corporation
- Principal Financial Group
- Russell Investments Limited
- Verus Advisory
- Washington State Investment Board
- Wells Fargo
Investment professionals attend the 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 portfolio managers who have worked in the investment industry (mostly equity securities) for more than 20 years. Firms represented include wealth managers, financial advisers, family offices, trust companies, and others involved in the management of private wealth.

The delegate profile reflects data from the Wealth Management 2019 Conference in Fort Lauderdale, Florida, USA

Delegate Attendance

237

CFA Institute Membership Status

194
Members (82%)
43
Non-member (18%)

Employer AUM (USD)

USD > $250 billion 8%
USD $20 billion–USD $250 billion 9%
USD $5 billion–USD $20 billion 6%
USD $1 billion–USD $5 billion 21%
USD $250 million–USD $1 billion 17%
< USD $250 million 13%
Not applicable 14%

Delegate Occupation

Portfolio Manager (41%)
Financial Advisor/Planner Manager (17%)
Chief Executive Officer (CEO) (6%)
Chief Investment Officer (CIO) (5%)
Sales Agent (5%)
Consultant (4%)
Investment Strategist (4%)
Manager of managers (4%)
Chief Financial Officer (CFO) (2%)
Research Analyst, Investment Analyst (2%)
Relationship Manager/Account Manager (2%)
Other (8%)

Primary Investment Practice

Equities (56%)
Fixed Income (6%)
Generalist (6%)
Private Equity (3%)
Derivatives (1%)
Hedge Funds (1%)
Real Estate (1%)
Venture Capital (1%)
Structured Products (1%)
Not Applicable (24%)

Region

Americas (88%)
EMEA (5%)
Asia Pacific (1%)
Unspecified (6%)

Buy Side/Sell Side

Buy side (60%)
Sell side (15%)
Both (7%)
Not Applicable (18%)

Primary Asset Base

Private (84%)
Institutional (11%)
Both (1%)
Not Applicable (4%)
**NETWORKING RECEPTION SPONSORSHIP**
USD $4,000 | 1 Available
1 Delegate Pass

The networking reception is held at the conclusion of the first day of programming. Sponsorship of the evening reception allows the supporting firm to make an impression on delegates as they network. The sponsor is promoted on site through signage, branded table tents, and beverage napkins.

**NETWORKING LUNCHEON SPONSORSHIP**
USD $4,000 | 1 Available
1 Delegate Pass

The Networking Luncheon Sponsorship provides your firm with the opportunity to indirectly engage a large audience and receive recognition during lunch on the first day of programming. The sponsor is promoted through signage, branded table tents, and beverage napkins.

**STANDARD EXHIBIT**
USD $5,500 | 10 Available
3 Delegate Passes

Exhibitors can generate strong sales leads and raise their firm’s profile 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.

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<th>SPONSORSHIP OPPORTUNITIES</th>
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<td><strong>Price</strong></td>
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<td>Digital recognition in the conference webpage’s supporter section</td>
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<td>Recognition in promotional emails and/or print advertisements</td>
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<td><strong>Onsite</strong></td>
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<td>Delegate passes*</td>
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<td>Branding at the networking reception</td>
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<td>Tabletop exhibit space**</td>
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* Additional delegate passes can be purchased at the discounted group rate

** Exhibit selection order is determined by the chronological order in which reservation forms are submitted