72ND CFA INSTITUTE ANNUAL CONFERENCE SPONSORSHIP KIT

12-15 May 2019 | ExCeL London | London, United Kingdom
Hosted with CFA Society of the United Kingdom
**Disruption: The New Reality in Investment Management**

Disruption is everywhere, affecting every aspect of our lives. From technological and business innovation to globalisation and demographic shifts, these forces are constantly evolving and accelerating at a significant pace.

Join us at the 72nd CFA Institute Annual Conference to learn how disruption is affecting the global investment profession, and how to harness its opportunities and approach its challenges – enabling you to stay current and best serve your clients’ needs in this rapidly changing world.

The flagship CFA Institute Annual Conference rotates continents and is one of the investment industry’s largest and longest-running educational gatherings of investment professionals, attracting as many as 1,800 delegates from 70 countries in prior years. Taking place in London, the conference will feature keynotes with noted economists, best-selling authors, leading researchers and successful practitioners, as well as dedicated educational tracks on FinTech, Sustainable Investing, Private Wealth Management, Investing in Emerging Markets, Career Management and more.

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 72nd CFA Institute Annual Conference, please contact:

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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 155,000 members in 165 countries and territories, including 150,000 CFA® charterholders, and 153 member societies.

Top employers of CFA Institute Members globally:
- Bank of America Merrill Lynch
- BlackRock
- Citigroup
- Credit Suisse
- HSBC
- JPMorgan Chase
- Morgan Stanley
- Royal Bank of Canada
- UBS
- Wells Fargo

 ABOUT CFA SOCIETY OF THE UNITED KINGDOM

Founded in 1955, CFA Society UK represents around 12,000 investment professionals and is part of the worldwide network of CFA Institute member societies. We actively promote the highest standards of ethics, education and professional excellence.

Top employers of CFA® charterholders in the United Kingdom:
- Aberdeen Standard Investments
- Aviva Investors
- Barclays
- Blackrock
- Credit Suisse
- Deutsche Bank
- Goldman Sachs
- Janus Henderson Investors
- Insight Investment
- JP Morgan Asset Management
- Legal & General Investment Management
- M&G Investments
- Mercer
- Morgan Stanley
- Schroders
Investment professionals from around the globe attend the CFA Institute Annual Conference to network with peers; attend educational sessions led by respected industry experts; and learn of new resources, products, and services that are available to assist their performance in their profession.

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, broker and dealers, insurance companies, commercial banks, and related businesses.

The delegate profile reflects aggregate data* from the 2014 - 2018 CFA Institute Annual Conferences

**Delegate Attendance**

1,565

**CFA Institute Membership Status**

- Member (68%)
- Non-member (32%)

**Employer AUM (USD)**

- >USD $250 billion: 12%
- USD $50 billion–USD $250 billion: 9%
- USD $20 billion–USD $50 billion: 13%
- USD $5 billion–USD $20 billion: 11%
- USD $1 billion–USD $5 billion: 9%
- USD $250 million–USD $1 billion: 12%
- <USD $250 million: 9%
- Not applicable: 19%
- Prefer not to answer: 6%

**Delegate Occupation**

- Portfolio Manager (45%)
- Chief-Level Executive (9%)
- Consultant (8%)
- Manager of Managers (6%)
- Research Analyst (6%)
- Relationship Manager (5%)
- Financial Advisor (3%)
- Strategist (3%)
- Corporate Financial Analyst (2%)
- Risk Manager (2%)
- Trader (2%)
- Academic (1%)
- Accountant/Auditor (1%)
- Investment Banking Analyst (1%)
- Other (5%)

**Primary Investment Practice**

- Equities (43%)
- Fixed Income (16%)
- Private Equity (4%)
- Derivatives (2%)
- Hedge Funds (2%)
- Real Estate (2%)
- Foreign Currency (1%)
- Generalist (1%)
- Indexed (1%)
- Structured Products (1%)
- Other (9%)
- Not Applicable (18%)

**Region**

- Americas (64%)
- Asia Pacific (11%)
- EMEA (24%)
- Unspecified (1%)

**Buy Side/Sell Side**

- Buy side (60%)
- Sell side (9%)
- Both (8%)
- Not Applicable (23%)

**Primary Asset Base**

- Institutional (39%)
- Private (13%)
- Both (24%)
- Not Applicable (24%)

*Additional delegate information can be provided on request*
Platinum Sponsorship
GBP 50,000 | 2 Available | 14 Delegate Passes

The Platinum Sponsorship delivers the highest level of recognition throughout the Annual Conference’s global marketing campaign and live program. As one of the two platinum sponsors, your firm receives premium brand exposure during the closing conference reception on Tuesday evening, the opportunity to position your senior-level thought leadership among our delegates via a corporate presentation, and an elevated presence in the exhibit hall with a 6m x 6m booth space. Make an impression on conference delegates as they network by projecting your firm’s presence throughout the duration of the event.

Gold Sponsorship
GBP 35,000 | 3 Available | 12 Delegate Passes

The Gold Sponsorship delivers significant recognition throughout the Annual Conference’s global marketing campaign and live program. As one of the three gold sponsors, your firm is able to make the first impression on conference delegates during the opening reception on Sunday evening. Your firm also receives the opportunity to position your senior-level thought leadership among our delegates via a corporate presentation and an elevated presence in the exhibit hall with a 6m x 3m booth space.

Silver Sponsorship
GBP 25,000 | 7 Available | 8 Delegate Passes

As a Silver Sponsor, your firm enjoys premium-level recognition throughout the conference. Silver sponsors receive a 3m x 3m booth space and the opportunity to position their senior-level thought leadership among our delegates via a corporate presentation.
# PREMIUM SPONSORSHIPS

<table>
<thead>
<tr>
<th>PREMIUM SPONSORSHIP OPPORTUNITIES</th>
<th>PLATINUM</th>
<th>GOLD</th>
<th>SILVER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>GBP 50,000</td>
<td>GBP 35,000</td>
<td>GBP 25,000</td>
</tr>
<tr>
<td>Quantity Available</td>
<td>2</td>
<td>3</td>
<td>7</td>
</tr>
</tbody>
</table>

## DELIVERABLES

### PRE-EVENT
- Digital recognition on the dedicated conference website's homepage
- Digital recognition in the conference website's supporter section
- One-time use of opt-in delegate mailing and email list
- Recognition in promotional emails and/or print advertisements

### ONSITE
- Delegate passes*  14  12  8
- 45 minute corporate presentation**
- Branding at the closing evening reception on 14 May
- Branding at the opening evening reception on 12 May
- Premium exhibit booth space***  6m x 6m  6m x 3m  3m x 3m
- Audible recognition from the speaker podium
- Recognition in onsite conference branding (print and/or digital signage)

### POST-EVENT
- One-time use of opt-in delegate mailing and email list

* Includes Corporate Presentation speaker. Any additional delegate passes can be purchased at the discounted group rate of GBP 750

** Corporate presentation selection order is determined by the premium sponsorship level and the chronological order in which reservation forms are submitted

*** Exhibit selection order is determined by the premium sponsorship level and the chronological order in which reservation forms are submitted

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**CORPORATE PRESENTATION SPONSORSHIP SCHEDULE**

<table>
<thead>
<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:30 – 13:15 (4 corporate presentations)</td>
<td>08:00 – 08:45 (4 corporate presentations)</td>
</tr>
<tr>
<td></td>
<td>12:30 – 13:15 (4 corporate presentations)</td>
</tr>
</tbody>
</table>

Receive a **10% discount** with consideration of any combination of a premium sponsorship, branding opportunity, or exhibit opportunity.
BRANDING OPPORTUNITIES

**Sports Simulator Sponsorship**

GBP 20,000 | 2 Available
5 Delegate Passes

The sports simulators will be popular attractions amongst our conference delegates. These eye-catching sponsorships will be located in the exhibit hall and presents a prominent display of your firm’s branding on the simulator. The opportunity includes a tabletop exhibit to display your materials, engage with delegates, and promote your products and services.

**Conference App Sponsorship**

GBP 15,500 | 1 Available
5 Delegate Passes

Our conference app is the primary mechanism by which delegates choose sessions to attend and navigate around the conference. Put your company’s products and services in the palm of our conference delegates. This exclusive sponsorship provides high-exposure placement in the app. Your company logo will be a permanent fixture on the landing page of the app and will link to the webpage of your choice.

**Specialty Coffee Station Sponsorship**

GBP 11,500 | 1 Available
5 Delegate Passes

As the specialty coffee station sponsor, your firm wakes up with conference delegates. The specialty coffee station features prominent signage and individually branded coffee cup sleeves and beverage napkins throughout the conference. This opportunity is limited to one sponsor.

**Recharge Sponsorship**

GBP 11,500 | 1 Available
5 Delegate Passes

As the Recharge Sponsor, your firm’s branding appears on the mobile device charging stations located in the exhibit hall’s Recharge Lounge.

**Shoe Shine Sponsorship**

GBP 11,500 | 1 Available
5 Delegate Passes

The Shoe Shine Station Sponsorship includes a branded space for conference delegates to sharpen their image and affords your firm the opportunity to engage with Annual Conference attendees in a unique way. The sponsor is promoted through branded signage and an opportunity to display their literature in the space.

The opportunity includes a tabletop exhibit and monitor to display your materials, engage with delegates, and promote your products and services.
## BRANDING OPPORTUNITIES

<table>
<thead>
<tr>
<th>BRANDING OPPORTUNITIES</th>
<th>SPORTS SIMULATOR</th>
<th>CONFERENCE APP</th>
<th>SPECIALTY COFFEE STATION</th>
<th>RECHARGE</th>
<th>SHOE SHINE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Price</strong></td>
<td>GBP 20,000</td>
<td>GBP 15,500</td>
<td>GBP 11,500</td>
<td>GBP 11,500</td>
<td>GBP 11,500</td>
</tr>
<tr>
<td><strong>Quantity Available</strong></td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>PRE-EVENT</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Digital recognition in the conference website's supporter section</td>
<td>•</td>
<td>•</td>
<td>•</td>
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</tr>
<tr>
<td>One-time use of opt-in delegate mailing and email list</td>
<td>•</td>
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<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Recognition in promotional emails and/or print advertisements</td>
<td>•</td>
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<td>•</td>
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</tr>
<tr>
<td><strong>ONSITE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Branded coffee cup sleeves and beverage napkins</td>
<td>•</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Branded signage at the specialty coffee station</td>
<td>•</td>
<td>•</td>
<td></td>
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<tr>
<td>Branding displayed at the sponsored shoe shine station</td>
<td>•</td>
<td>•</td>
<td></td>
<td></td>
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<tr>
<td>Branding displayed at the sponsored sports simulator</td>
<td>•</td>
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<td></td>
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<tr>
<td>Tabletop exhibit space</td>
<td>•</td>
<td></td>
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<tr>
<td>Mention in the conference app description in the App Store/Google Play</td>
<td>•</td>
<td></td>
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<tr>
<td>Banner ad in lower bottom of the app</td>
<td>•</td>
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<td></td>
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<tr>
<td>Co-branding on official Conference App splash screen</td>
<td>•</td>
<td>•</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Branding on mobile device charging units</td>
<td>•</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delegate passes*</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Recognition in onsite conference branding (print and/or digital signage)</td>
<td>•</td>
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<tr>
<td><strong>POST-EVENT</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>One-time use of opt-in delegate mailing and email list</td>
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</tr>
</tbody>
</table>

* Additional delegate passes can be purchased at the discounted group rate of GBP 750

Receive a **10% discount** with consideration of any combination of a premium sponsorship, branding opportunity, or exhibit opportunity.
BRANDING OPPORTUNITIES

**Headshot Sponsorship**

GBP 11,500 | 1 Available
5 Delegate Passes

The Headshot Station is the most popular amenity amongst our conference delegates. As the Headshot Station Sponsor, your firm receives recognition as the conference's official service provider of the professional headshots. This sponsorship allows your firm to enjoy branding in three ways: through onsite signage in the exhibit hall, preprinted photo sleeves with sponsor logo and/or branded message, and sponsor logo included in the border of the individual’s printed headshot.

**Conference Live Programming Sponsorship**

GBP 11,500 | 3 Available
4 Delegate Passes

The Conference Live Programming Sponsorship delivers an online conference experience providing our virtual audience with access to over 10 hours of live content, including key sessions and exclusive interviews with speakers and attendees throughout the entire event. As one of our Conference Live Programming Sponsors, your firm demonstrates commitment to education and professional development through exclusive brand recognition during a full day of programming. This sponsorship is designed to elevate your firm’s brand by promoting it to our onsite and virtual global audience.

**Networking Luncheon Sponsorship**

GBP 7,000 | 2 Available
3 Delegate Passes

The Networking Luncheon Sponsorship provides your firm with the opportunity to indirectly engage a large audience and receive recognition as a supporter of the event. Luncheons also give sponsor representatives an informal opportunity to interact with conference attendees. The sponsor is promoted through onsite signage, branded table tents, and beverage napkins. The sponsor will also receive the opportunity to host a private VIP luncheon for up to 40 delegates.

**Showcase Presentation Sponsorship**

GBP 4,000 | 4 Available
2 Delegate Passes

The Showcase Presentation Sponsorship is a speaking opportunity that allows your firm’s representative to present demonstrations and/or insights that range from product technology to investment strategies to our conference delegates. These 20 minute showcase presentations will take place during the scheduled breaks in a dedicated space within the exhibit hall. This sponsorship is an add-on opportunity limited only to firms with an exhibit booth.
## BRANDING OPPORTUNITIES

<table>
<thead>
<tr>
<th>BRANDING OPPORTUNITIES</th>
<th>HEADSHOT</th>
<th>CONFERENCE LIVE</th>
<th>NETWORKING LUNCHEON</th>
<th>SHOWCASE PRESENTATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Price</strong></td>
<td>GBP 11,500</td>
<td>GBP 11,500</td>
<td>GBP 7,000</td>
<td>GBP 4,000</td>
</tr>
<tr>
<td><strong>Quantity Available</strong></td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>4</td>
</tr>
</tbody>
</table>

### DELIVERABLES

#### PRE-EVENT

- Digital recognition in the conference website's supporter section
- One-time use of opt-in delegate mailing and email list
- Recognition in promotional emails and/or print advertisements

#### ONSITE

- Branding (logo and/or message) preprinted on photo sleeves
- Branding on printed headshot photo
- Branding displayed at the Headshot Station area
- Branding displayed at one networking luncheon on 13 or 14 May
- Branding displayed during the day's plenary session
- Branding displayed outside of news desk area in the exhibit hall
- Recognition on the Conference Live website as the day's Conference Live Programming Sponsor
- Opportunity to submit promotional video(s) (15–30 seconds) to be played between video feed transitions
- Opportunity for a Senior Executive to be interviewed (live) by our news desk anchors (7–10 minutes)
- Opportunity to host private lunch for up to 40 people*
- Delegate passes**
- Recognition in onsite conference branding (print and/or digital signage)
- 20 minute presentation on the showcase stage***

#### POST-EVENT

- One-time use of opt-in delegate mailing and email list

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* All inclusive
** Additional delegate passes can be purchased at the discounted group rate of GBP 750
*** Showcase presentation selection order is determined by the chronological order in which reservation forms are submitted

### SHOWCASE PRESENTATION SCHEDULE

<table>
<thead>
<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
</tr>
</thead>
</table>

Receive a **10% discount** with consideration of any combination of a premium sponsorship, branding opportunity, or exhibit opportunity.
EXHIBIT PROGRAM

Exhibitors can generate strong sales leads and raise their firm’s profile in the investment community through this effective opportunity to reach and interact face-to-face with industry decision makers and achieve business development goals. Display and market your firm’s products and services directly to investment professionals. Morning and afternoon refreshment breaks will take place in the exhibit area.

The premium exhibit opportunity is an upgraded option to the standard exhibit opportunity and includes one additional complimentary conference registration. Premium exhibits also receive priority in the exhibit selection order.

The kiosk exhibit is an ideal option for FinTech firms, university programs, and industry startups to have a presence at the CFA Institute Annual Conference at an introductory price point. The opportunity includes a standing kiosk with monitor and appropriate connections for your laptop to display your firm’s products and services.

<table>
<thead>
<tr>
<th>EXHIBIT OPPORTUNITIES</th>
<th>PREMIUM EXHIBIT</th>
<th>STANDARD EXHIBIT</th>
<th>KIOSK EXHIBIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>GBP 9,000</td>
<td>GBP 7,500</td>
<td>GBP 4,500</td>
</tr>
<tr>
<td>Quantity Available</td>
<td>8</td>
<td>21</td>
<td>8</td>
</tr>
</tbody>
</table>

**DELIVERABLES**

**PRE-EVENT**

- Digital recognition in the conference website’s supporter section
- One-time use of opt-in delegate mailing and email list
- Recognition in promotional emails and/or print advertisements

**ONSITE**

- Delegate passes*
- Exhibit booth space**
- Recognition in onsite conference branding (print and/or digital signage)

**POST-EVENT**

- One-time use of opt-in delegate mailing and email list

* Additional delegate passes can be purchased at the discounted group rate of GBP 750
** Exhibit selection order is determined by the chronological order in which reservation forms are submitted

Receive a **10% discount** with consideration of any combination of a premium sponsorship, branding opportunity, or exhibit opportunity
Advocate Sponsorship

The Advocate Sponsorship allows a firm to choose between two options for sending multiple representatives to the CFA Institute Annual Conference. Firms may choose between Full Conference Passes or Day Conference Passes. Each option requires a minimum purchase of 10 passes/registrations. Our advocate sponsors are recognized on our conference website and onsite conference branding for their corporate financial support to the conference.

<table>
<thead>
<tr>
<th>ADVOCATE SPONSORSHIP OPPORTUNITIES</th>
<th>FULL CONFERENCE PASS</th>
<th>DAY CONFERENCE PASS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price (minimum of 10 must be purchased)</td>
<td>GBP 675/person</td>
<td>GBP 300/person</td>
</tr>
<tr>
<td>Quantity Available</td>
<td>∞ (Unlimited Availability)</td>
<td>∞ (Unlimited Availability)</td>
</tr>
</tbody>
</table>

**DELIVERABLES**

**PRE-EVENT**

- Digital recognition in the conference website’s supporter section
- Recognition in promotional emails and/or print advertisements

**ONSITE**

- Conference delegate passes
- Recognition in onsite conference branding (print and/or digital signage)
- CFA Institute Continuing Education (CE) Credits*

<table>
<thead>
<tr>
<th></th>
<th>Full Conference Pass</th>
<th>Day Conference Pass</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference delegate passes</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Recognition in onsite conference branding (print and/or digital signage)</td>
<td>•</td>
<td>•</td>
</tr>
</tbody>
</table>
| CFA Institute Continuing Education (CE) Credits* | Up to 17** | Sunday – Up to 3.5**
| | | Monday – 5
| | | Tuesday – 5.5
| | | Wednesday – 3 |

* Credits subject to change. SER credit will be determined when the agenda is finalized
** Exact credit is dependent on actual sessions attended