73RD CFA INSTITUTE
ANNUAL CONFERENCE
SPONSORSHIP KIT

17–20 May 2020 | Georgia World Congress Center
Atlanta, Georgia, United States
Hosted with CFA Society Atlanta
Thriving in Today's Connected Market

The smartest investors connect with ideas to launch new strategies and navigate the evolving global marketplace to move ahead in their work and careers. The best way to tap into tomorrow's opportunities is to build better connections to today's trends, today's technologies, and today's leaders, because that's how we thrive in today's connected market.

Join us for the 73rd CFA Institute Annual Conference to hear from and connect with some of the best and brightest minds from the world of global investing. Learn how to harness opportunities and approach challenges, enabling you to stay current and best serve your clients' needs in this rapidly changing market.

Taking place in Atlanta, the conference will feature presentations from noted investors, geopolitical experts, best-selling authors, leading researchers, and successful practitioners, covering alternative investing, wealth management, global trends, career development, technology and investing, sustainable investing, psychology and decision making, 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 73rd CFA Institute Annual Conference, please contact:

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Director, Global 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 Atlanta is a member society of CFA Institute, a non-profit organization, which promotes the highest standards of ethics, education, and professional excellence among the investment professionals of greater Atlanta and all surrounding areas of Georgia. We serve our members and the local financial community through educational and other programs and thereby contribute to the enhancement of our profession. CFA Society Atlanta also supports financial literacy and diversity in finance initiatives.

**Top employers of CFA® charterholders in Atlanta:**
- Bank of America Merrill Lynch
- Eaton Vance
- Ernst & Young
- Goldman Sachs
- Invesco Ltd.
- Montag & Caldwell Inc.
- Morgan Stanley
- SunTrust
- UBS
- Voya Investment Management LLC
- Wells Fargo
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, brokers and dealers, insurance companies, commercial banks, and related businesses.

The delegate profile reflects aggregate data* from the 2015–2019 CFA Institute Annual Conferences

<table>
<thead>
<tr>
<th>Delegate Attendance</th>
<th>1,563</th>
</tr>
</thead>
<tbody>
<tr>
<td>CFA Institute Membership Status</td>
<td></td>
</tr>
<tr>
<td>Member (66%)</td>
<td>Non-member (34%)</td>
</tr>
<tr>
<td>Employer AUM (USD)</td>
<td></td>
</tr>
<tr>
<td>&gt;USD 250 billion</td>
<td>9%</td>
</tr>
<tr>
<td>USD 50 billion–USD 250 billion</td>
<td>12%</td>
</tr>
<tr>
<td>USD 20 billion–USD 50 billion</td>
<td>9%</td>
</tr>
<tr>
<td>USD 5 billion–USD 20 billion</td>
<td>12%</td>
</tr>
<tr>
<td>USD 1 billion–USD 5 billion</td>
<td>13%</td>
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<tr>
<td>USD 250 million–USD 1 billion</td>
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<tr>
<td>&lt;USD 250 million</td>
<td>12%</td>
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<tr>
<td></td>
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<tr>
<td>Delegate Occupation</td>
<td></td>
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<tr>
<td>Portfolio Manager (40%)</td>
<td></td>
</tr>
<tr>
<td>Consultant (9%)</td>
<td></td>
</tr>
<tr>
<td>Research Analyst, Investment Analyst, or Quantitative Analyst (7%)</td>
<td></td>
</tr>
<tr>
<td>Manager of Managers (6%)</td>
<td></td>
</tr>
<tr>
<td>CEO (5%)</td>
<td></td>
</tr>
<tr>
<td>CIO (4%)</td>
<td></td>
</tr>
<tr>
<td>Investment Strategist (4%)</td>
<td></td>
</tr>
<tr>
<td>Sales Agent (4%)</td>
<td></td>
</tr>
<tr>
<td>Financial Adviser/Planner/Wealth Manager (3%)</td>
<td></td>
</tr>
<tr>
<td>Corporate Financial Analyst (2%)</td>
<td></td>
</tr>
<tr>
<td>Relationship Manager/Account Manager (2%)</td>
<td></td>
</tr>
<tr>
<td>Auditor (1%)</td>
<td></td>
</tr>
<tr>
<td>Performance Analyst (1%)</td>
<td></td>
</tr>
</tbody>
</table>

| Primary Investment Practice | |
| Equities (43%) | |
| Fixed Income (16%) | |
| Private Equity (3%) | |
| Derivatives (2%) | |
| Hedge Funds (2%) | |
| Real Estate (2%) | |
| FX/Currency (1%) | |
| Generalist (1%) | |
| Indexed (1%) | |
| Structured Products (1%) | |
| Not Applicable (26%) | |

| Region | |
| Americas (53%) | EMEA (31%) |
| Asia Pacific (11%) | Unspecified (5%) |

| Buy Side/Sell Side | |
| Buy Side (59%) | Sell Side (9%) |
| Both (8%) | Not Applicable (24%) |

| Primary Asset Base | |
| Institutional (41%) | Private (14%) |
| Both (20%) | Not Applicable (24%) |

Locations of Past Five CFA Institute Annual Conferences
- 2019: London, UK
- 2018: Hong Kong, SAR
- 2017: Philadelphia, PA, USA
- 2016: Montréal, QC, Canada
- 2015: Frankfurt, Germany

*Additional delegate information can be provided on request.
PREMIUM SPONSORSHIPS

**Platinum**
USD 70,000 | 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 Tuesday evening reception, 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 20’ x 20’ booth space. Make an impression on conference delegates as they network by projecting your firm’s presence throughout the duration of the event.

**Gold**
USD 50,000 | 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 Sunday evening reception. 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 20’ x 10’ booth space.

**Silver**
USD 35,000 | 7 Available | 8 Delegate Passes

As a Silver Sponsor, your firm enjoys premium-level recognition throughout the conference. Silver sponsors receive a 10’ x 10’ 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><strong>Price</strong></td>
<td>USD 70,000</td>
<td>USD 50,000</td>
<td>USD 35,000</td>
</tr>
<tr>
<td><strong>Quantity Available</strong></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**
- Premium branding at the Tuesday evening reception
- Premium branding at the Sunday evening reception
- Premium exhibit booth space*** 20' x 20' 20' x 10' 10' x 10'
- 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

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* Includes Corporate Presentation speaker. Any additional delegate passes can be purchased at the discounted group rate of USD 995

** 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

### CORPORATE PRESENTATION SPONSORSHIP SCHEDULE

<table>
<thead>
<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:45 p.m.–1:30 p.m. (6 corporate presentations)</td>
<td>12:45 p.m.–1:30 p.m. (6 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

USD 25,000 | 2 Available  
5 Delegate Passes

The sports simulators will be popular attractions among our conference delegates. These eye-catching sponsorships will be located in the exhibit hall and present 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

USD 20,000 | 1 Available  
4 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 splash screen of the app and includes an opportunity to display a banner ad graphic.

Relaxation Station

USD 25,000 | 1 Available  
5 Delegate Passes

Rejuvenate attendees with this demand service that provides a relaxing five-minute upper body neck, shoulder, and/or back massage by licensed, professional massage therapists. You may provide branded clothing, such as golf shirts, for the massage practitioners to wear for the duration of the event. In addition to your branding appearing within the relaxation station, this opportunity includes an exhibit booth space.

Specialty Coffee Station

USD 15,000 | 1 Available  
3 Delegate Passes

As the specialty coffee station sponsor, your firm wakes up our conference delegates and keeps them going throughout the day. 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.
## BRANDING OPPORTUNITIES

<table>
<thead>
<tr>
<th>BRANDING OPPORTUNITIES</th>
<th>SPORTS SIMULATOR</th>
<th>RELAXATION STATION</th>
<th>CONFERENCE APP</th>
<th>SPECIALTY COFFEE STATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>USD 25,000</td>
<td>USD 25,000</td>
<td>USD 20,000</td>
<td>USD 15,000</td>
</tr>
<tr>
<td>Quantity Available</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

### DELIVERYABLES

#### 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

- Branded coffee cup sleeves and beverage napkins
- Branded signage at the specialty coffee station
- Branding displayed at the sponsored sports simulator
- Branding displayed at the sponsored relaxation station
- Exhibit booth space: Tabletop 10' x 10'
- Clickable banner ad within the app
- Co-branding on official Conference App splash screen
- Delegate passes*: 5 5 4 3
- 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 USD 995

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

**Headshot Station**

USD 15,000 | 1 Available  
3 Delegate Passes

The Headshot Station is the most popular amenity among 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**

USD 15,000 | 3 Available  
3 Delegate Passes

The Conference Live Programming Sponsorship delivers an online conference experience providing our virtual audience with access to over 18 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 by reaching over 15,000* live and archived views.

*This number represents total live and archived views one month after the conference

**Charging Stations**

USD 15,000 | 1 Available  
3 Delegate Passes

As the sponsor of the charging stations, your firm's branding appears on mobile device charging stations located in the exhibit hall and throughout the main conference area. This high-profile branding opportunity provides strong brand visibility for your firm throughout the conference.

**Shoe Shine Station**

USD 15,000 | 1 Available  
3 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 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>Headshot Station</th>
<th>Conference Live</th>
<th>Charging Stations</th>
<th>Shoe Shine Station</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Price</strong></td>
<td>USD 15,000</td>
<td>USD 15,000</td>
<td>USD 15,000</td>
<td>USD 15,000</td>
</tr>
<tr>
<td><strong>Quantity Available</strong></td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>1</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 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 on the online platform
- Opportunity for a senior executive to be interviewed (live) by our news desk anchors (7-10 minutes) at the Conference Live studio
- Branding on mobile device charging units
- Branding displayed at sponsored Shoe Shine Station
- Exhibit booth space: Tabletop
- Delegate passes*: 3, 3, 3, 3
- 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 USD 995

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

Headphones
USD 15,000 | 1 Available
3 Delegate Passes

Building on the "Silent Disco" theme, these popular, noise-canceling headphones are provided to conference delegates to actively hear and engage their attention to live presentations and video feeds in a busy exhibit hall. As the exclusive sponsor, your firm’s brand appears on over 300 headphones provided in designated areas in the exhibit hall.

Networking Luncheon
USD 10,000 | 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. 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
USD 6,000 | 4 Available
1 Delegate Pass

The Showcase Presentation Sponsorship is a speaking opportunity that allows your firm’s representative to present to our conference delegates demonstrations and/or insights that range from product technology to investment strategies. 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.

<table>
<thead>
<tr>
<th>BRANDING OPPORTUNITIES</th>
<th>HEADPHONES</th>
<th>NETWORKING LUNCHEON</th>
<th>SHOWCASE PRESENTATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>USD 15,000</td>
<td>USD 10,000</td>
<td>USD 6,000</td>
</tr>
<tr>
<td>Quantity Available</td>
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<td>2</td>
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</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 on wireless headphones in the exhibit hall
- Branding displayed at the Monday or Tuesday networking luncheon
- Opportunity to host private lunch for up to 40 people*
- 20 minute presentation on the showcase stage**
- Delegate passes***
- Recognition in onsite conference branding (print and/or digital signage)

POST-EVENT

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

* All inclusive
** Showcase presentation selection order is determined by the chronological order in which reservation forms are submitted
*** Additional delegate passes can be purchased at the discounted group rate of USD 995

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

SHOWCASE PRESENTATION SCHEDULE

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

EXHIBIT OPPORTUNITIES

<table>
<thead>
<tr>
<th>EXHIBIT OPPORTUNITIES</th>
<th>PREMIUM EXHIBIT</th>
<th>STANDARD EXHIBIT</th>
<th>KIOSK EXHIBIT</th>
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</thead>
<tbody>
<tr>
<td>Price</td>
<td>USD 12,000</td>
<td>USD 10,000</td>
<td>USD 6,000</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* 5 4 2
- Exhibit booth space** 10’ x 10’ 10’ x 10’ Kiosk
- Recognition in onsite conference branding (print and/or digital signage)

**Post-Event**

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

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* Additional delegate passes can be purchased at the discounted group rate of USD 995
** 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.

Premium Exhibit
USD 12,000 | 8 Available
5 Delegate Passes

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.

Standard Exhibit
USD 10,000 | 21 Available
4 Delegate Passes

Kiosk Exhibit
USD 6,000 | 8 Available
2 Delegate Passes
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 through 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>
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</thead>
<tbody>
<tr>
<td><strong>Price (minimum of 10 must be purchased)</strong></td>
<td>USD 995/person</td>
<td>USD 500/person</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*
  - Up to 16.5**
  - Sunday—Up to 4**
  - Monday—4.25
  - Tuesday—5.25
  - Wednesday—3

* Credits subject to change. SER credit will be determined when the agenda is finalized

** Exact credit is dependent on actual sessions attended