CFA INSTITUTE
EQUITY RESEARCH AND VALUATION CONFERENCE 2020
SPONSORSHIP KIT
12–13 November 2020 | New York Hilton Midtown
New York City, New York, USA
Hosted with CFA Society New York
Equity Research and Valuation aims to keep investment managers abreast of the latest advances and developments in equity research techniques, valuation, and portfolio management. Join world-class equity investors for insights into valuation to help you avoid the market's noise and stay focused on client objectives. Learn to avoid behavioral pitfalls in investing, and gain a better understanding of the differences between pricing assets and valuation. Topics for discussion will include valuation approaches and analysis, global investment strategies, research methods, how to better understand and analyze portfolio risks, and the top challenges equity investors face today.

Conference topic areas include the following:

- Equity Investments

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 Equity Research and Valuation 2019 conference, please contact:

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Director, Global Sponsorship Programs
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ABOUT CFA INSTITUTE

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
• JP Morgan Chase
• Morgan Stanley
• Royal Bank of Canada
• UBS
• TD Bank Financial Group
• Wells Fargo

About CFA Society New York

With over 10,000 members, CFA Society New York (CFANY) is the largest CFA society in the world. We are chief investment officers, portfolio managers and leading analysts on both the buy-side and the sell-side of the industry. Over 95% of our members are CFA charterholders. Through generations of investment professionals, CFANY has remained steady as a leading forum for the investment community since 1937, and a hub for objective, independent thought.

Top employers of CFA charterholders in New York City:
• AllianceBernstein
• Bank of America Merrill Lynch
• BlackRock
• Citigroup
• Ernst & Young
• Goldman Sachs
• JP Morgan Chase
• Morgan Stanley
• Prudential Financial
• UBS
The demographic profile reflects data from the Equity Research and Valuation 2019 conference in New York, New York, USA.

Investment management professionals attend the CFA Institute Equity Research and Valuation 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 global equity analysts and portfolio managers who have worked in the investment industry (mostly in equity securities) for over 20 years.

Firms represented include investment firms, mutual fund companies, investment advisory firms, and broker dealers serving both institutional and private clients.

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**Delegate Attendance**

135

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**CFA Institute Membership Status**

<table>
<thead>
<tr>
<th>Membership Status</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Member</td>
<td>74%</td>
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<tr>
<td>Non-member</td>
<td>26%</td>
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</tbody>
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**Region**

- Americas (85%)
- Asia Pacific (2%)
- EMEA (5%)
- Unspecified (8%)

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**Primary Asset Base**

- Institutional (31%)
- Private / Individual (31%)
- Not Applicable (38%)

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**Years in the Investment Industry**

- 5 years or less: 6%
- 6 to 10 years: 22%
- 11 to 15 years: 15%
- 16 to 20 years: 14%
- Over 20 years: 41%
- Not applicable: 2%

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**Investment Focus**

- Equities: 47%
- Fixed Income: 24%
- Generalist: 6%
- Real Estate: 6%
- Hedge Funds: 6%
- Structured Products: 6%
- Other: 5%

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**Delegate Occupation**

- Portfolio Manager (42%)
- Research Analyst (16%)
- Financial Adviser (7%)
- Consultant (5%)
- Corporate Financial Analyst (4%)
- Accountant (3%)
- Investment Strategist (3%)
- Manager of Managers (2%)
- Information Technology (2%)
- Chief Investment Officer (2%)
- Economist (2%)
- Risk Analyst (1%)
- Relationship Manager (1%)
- Credit Analyst (1%)
- Financial Examiner (1%)

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**Employer Type**

- Asset Management (44%)
- Private Wealth Management (16%)
- Pension Fund (6%)
- Commercial Bank (5%)
- Consulting (4%)
- Brokerage (4%)
- University (4%)
- Insurance (4%)
- Accounting (3%)
- Investment Bank (3%)
- Government (2%)
- Manufacturing (2%)
- Information Technology (2%)
- Business (1%)
- Other (6%)
**SPONSORSHIP OPPORTUNITIES**

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**DAY PROGRAMMING SPONSOR**

**USD 4,500 | 1 Available**

2 Complimentary Delegate Passes

Visibly align your firm’s support with the mission and values of CFA Institute as the Day Programming Sponsor. The Day Programming Sponsorship offers several brand recognition opportunities during the live event. Your firm will receive exclusive brand exposure during the day’s plenary session, networking luncheon, evening reception, and refreshment breaks.

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**STANDARD EXHIBIT**

**USD 4,000 | 4 Available**

2 Complimentary 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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<table>
<thead>
<tr>
<th>SPONSORSHIP OPPORTUNITIES</th>
<th>SPONSORSHIP PROGRAM</th>
<th>EXHIBIT PROGRAM</th>
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<td><strong>Price</strong></td>
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<tr>
<td><strong>Quantities Available</strong></td>
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**Deliverables**

**Pre-event**

- Digital recognition in the supporters section of the conference webpage
- One-time use of the pre-event opt-in mailing and email list
- Recognition in promotional emails and/or print advertisements

**Onsite**

- Recognition by the plenary session moderator
- Seat drop opportunity during the networking luncheon
- Delegate passes* 2 2
- Exclusive branding at the networking luncheon
- Exclusive branding during the Livestream broadcast session**
- Exclusive branding during the plenary session
- Exclusive branding at the evening reception
- Tabletop exhibit space***
- Recognition in onsite conference branding (print and/or digital signage)

**Post-event**

- One-time use of the post-event opt-in mailing and email list

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

** As available

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