CFA INSTITUTE FIXED-INCOME MANAGEMENT 2020
SPONSORSHIP KIT

15-16 October 2020 | Westin Copley Place | Boston, Massachusetts, USA
Hosted with CFA Society Boston
At this year’s Fixed-Income Management Conference, leading practitioners will navigate through what is happening in global credit markets, take a closer look at the long-term effects of monetary policies by central banks, and discover where leading investors are finding value.

Leading practitioners at the conference will examine diversification strategies that generate income and provide relative safety for a variety of client mandates in spite of unprecedented policy and economic risks. Covering practical topics ranging from security analysis to sector allocation and risk management to portfolio construction, this year’s conference will bring together researchers, analysts, portfolio managers, and top strategists.

Conference topic areas include the following:

- Derivatives
- Economics
- Fixed Income
- Portfolio 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 Fixed-Income Management Conference 2019, please contact:

**Andy Jenkins**
Director, Global Sponsorship Programs
+1 (434) 951-5594
andy.jenkins@cfainstitute.org
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 Boston is New England’s largest membership organization for investment professionals with over 6,000 members. The membership represents over 650 investment firms and 95 percent of CFA Society Boston members hold the Chartered Financial Analyst designation from CFA Institute.

Top employers of CFA® charterholders in the Boston:

- Ameriprise Financial
- Bank of New York Mellon Corporation
- Eaton Vance
- Fidelity Investments
- Great-West LifeCo
- Loomis, Sayles & Company, L.P.
- Manulife Financial
- State Street Corporation
- SunLife Financial
- Wellington Management Company
Investment professionals attend the CFA Institute Fixed-Income Management 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 research analysts who have worked in the investment industry (mostly debt securities) for over 20 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 data from the Fixed-Income Management 2019 Conference in Boston, Massachusetts, USA.
SPONSORSHIP OPPORTUNITIES

NETWORKING RECEPTION SPONSORSHIP
USD 4,000 | 1 Available
1 Complimentary 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 onsite through signage, branded table tents, and beverage napkins.

NETWORKING LUNCHEON SPONSORSHIP
USD 4,000 | 1 Available
1 Complimentary 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 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.

<table>
<thead>
<tr>
<th>SPONSORSHIP OPPORTUNITIES</th>
<th>SPONSORSHIP PROGRAM</th>
<th>EXHIBIT PROGRAM</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Networking Reception</td>
<td>Networking Luncheon</td>
</tr>
<tr>
<td>Price</td>
<td>USD 4,000</td>
<td>USD 4,000</td>
</tr>
<tr>
<td>Quantity Available</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Deliverables</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-event</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital recognition on the conference webpage supporter section</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>One-time use of the pre-event opt-in mailing and email list</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Recognition in promotional emails and/or print advertisements</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Onsite</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delegate passes*</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Branding at the networking reception</td>
<td>•</td>
<td></td>
</tr>
<tr>
<td>Branding at the networking luncheon</td>
<td></td>
<td>•</td>
</tr>
<tr>
<td>Tabletop exhibit space**</td>
<td></td>
<td>•</td>
</tr>
<tr>
<td>Seat drop opportunity</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Recognition in onsite conference branding (print and/or digital signage)</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Post-event</td>
<td></td>
<td></td>
</tr>
<tr>
<td>One-time use of the post-event opt-in mailing and email list</td>
<td>•</td>
<td>•</td>
</tr>
</tbody>
</table>

* Additional delegate passes can be purchased at the discounted group rate of USD $1095.00
** Exhibit selection order is determined by the chronological order in which reservation forms are submitted