24th Annual GIPS® Standards Virtual Conference Sponsorship Kit

27–29 October 2020 | Virtual Event
Firms and asset owners that comply with the Global Investment Performance Standards (GIPS®) must comply with the 2020 edition when reporting performance through 31 December 2020. Prepare for the changes with subject matter experts who will address the key points you need to know for continued compliance with the GIPS standards in 2021. Regulatory experts will address the upcoming revised SEC Advertising Rule, and ESG experts will discuss developments with ESG investing and attribution. This conference is essential for any performance or compliance professional.

This year's 24th Annual GIPS Standards Virtual Conference will consist of six online sessions, with two sessions each day, from Tuesday, 27 October through Thursday, 29 October.

This year we are offering virtual sponsorship opportunities in support of this event. To secure any of these opportunities and gain access to investment professionals attending the 24th Annual GIPS Standards Virtual 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 180,000 members in 162 markets, including 175,000+ CFA® charterholders, and 158 member societies.

**Top employers of CFA Institute Members globally:**

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- Wells Fargo
- Morgan Stanley
- BlackRock
- TD Bank Financial Group
- BMO Financial Group
- Goldman Sachs
- Citigroup
- Credit Suisse
- Ernst & Young
- PricewaterhouseCoopers
- Allianz SE
- CIBC World Markets Inc.
- Deutsche Bank
- Fidelity Investments
- Scotiabank Group
- Deloitte
- KPMG
- BNP Paribas
- Barclays
- State Street Corporation
Investment professionals attend the Annual GIPS Standards 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 investment performance, risk, and compliance professionals who work for investment management firms and institutional asset owners. Attendees typically come from investment managers (traditional and alternative), asset owners, audit firms, consulting firms, software providers, and regulators.

The demographic profile reflects data from the in-person 23rd Annual GIPS Standards Conference in Scottsdale, Arizona, USA

### Delegate Attendance

- **411**

### CFA Institute Membership Status

- **Member (46%)**
- **Non-member (54%)**

### Region

- Americas (80%)
- Asia Pacific (4%)
- EMEA (8%)
- Unspecified (8%)

### Primary Asset Base

- Institutional (60%)
- Private / Individual (9%)
- Not Applicable (31%)

### Delegate Occupation

- Performance Analyst (44%)
- Consultant (10%)
- Accountant (4%)
- Compliance Analyst (4%)
- Research Analyst (3%)
- Portfolio Manager (3%)
- Manager of Managers (3%)
- Chief Executive Officer (3%)
- Information Technology (2%)
- Risk Analyst (1%)
- Relationship Manager (1%)
- Corporate Financial Analyst (1%)
- Chief Investment Officer (1%)
- Chief Financial Officer (1%)
- Other (18%)

### Years in the Investment Industry

- 5 years or less: 2%
- 6 to 10 years: 10%
- 11 to 15 years: 28%
- 16 to 20 years: 18%
- Over 20 years: 42%

### Investment Focus

- **Equities**: 45%
- Fixed Income: 13%
- Generalist: 9%
- Real Estate: 1%
- Private Equity: 1%
- High Yield: 1%
- Hedge Funds: 1%
- FX/Currency: 1%
- Derivatives: 1%
- Other: 27%

### Employer Type

- Asset Management (58%)
- Consulting Firm (6%)
- Verification Firm (6%)
- Pension Fund (6%)
- Information Technology (6%)
- Accounting (3%)
- Private Wealth Management (2%)
- Brokerage (1%)
- Commercial Bank (1%)
- Other (8%)
**GOLD SPONSORSHIP**

**USD 6,000 | 3 Available**

3 Conference Registrations

As a gold sponsor, your firm will receive significant brand recognition throughout the conference’s marketing campaign and virtual programming. This sponsorship includes recognition in the event’s promotional emails and one sponsor focused email to registered attendees. Each gold sponsor will receive exclusive branding during one full day of programming by providing promotional video(s) to be played between video feed transitions and a banner advertisement on the event site. Sponsoring firms will have the opportunity to engage in one-to-one messaging with virtual conference attendees.

**SILVER SPONSORSHIP**

**USD 3,000 | 15 Available**

1 Conference Registration

Silver sponsors receive recognition in the event’s promotional emails and one sponsor focused email to registered attendees. Along with the gold sponsors, this opportunity includes brand recognition in housekeeping slides, on the conference webpage, one-to-one messaging with virtual conference attendees, and access to the pre and post-event opt-in attendee lists.

**VIRTUAL SPONSORSHIP OPPORTUNITIES**

<table>
<thead>
<tr>
<th>Price</th>
<th>GOLD</th>
<th>SILVER</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Price</strong></td>
<td>USD 6,000</td>
<td>USD 3,000</td>
</tr>
<tr>
<td><strong>Quantities Available</strong></td>
<td>3</td>
<td>15</td>
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</tbody>
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**Deliverables**

**Pre-event**

- Digital recognition in the conference webpage’s supporter section
- One-time use of the opt-in delegate email list
- Recognition in promotional emails, plus a sponsor focused email

**Days of event**

- Conference registrations*
- 15-30 second video to be played at the beginning and the middle of programming on one designated day
- Opportunity to engage in one-to-one messaging with virtual conference attendees
- Banner advertisement on event site on one designated day
- Logo inclusion on sponsor recognition page and housekeeping slides

**Post-event**

- Detailed analytics report
- One-time use of the opt-in delegate email list

* Additional conference registrations can be purchased at the member rate