24th Annual GIPS® Standards Conference

Sponsorship Kit

28–29 October 2020 | Fairmont Chicago Millennium Park
Chicago, Illinois, USA

Hosted with CFA Society Chicago
The Annual GIPS® Standards Conference is the only conference of its kind focused on the implementation and application of the Global Investment Performance Standards (GIPS). Subject matter experts share best practices and speak to the key issues and major developments in the performance measurement field, making this conference essential for any performance or compliance professional.

**Conference topic areas include the following:**

- Performance measurement and evaluation
- Standards, ethics, and regulation (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 24th Annual GIPS Standards Conference, 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 Farg

CFA Society Chicago, the oldest investment analysts society, is part of the worldwide network of CFA Institute member societies that lead the investment profession globally by promoting the highest standards of ethics, education and professional excellence for the ultimate benefit of society. With 5,000 members, CFA Society Chicago offers diverse programming content including luncheons, educational events and professional development seminars.

Top employers of CFA® charterholders in Chicago:
- Allstate
- Aon
- Bank of America Merrill Lynch
- BMO Financial Group
- JP Morgan Chase
- Morningstar, Inc.
- Northern Trust
- PPM America
- TIAA-CREF
- William Blair & Compan
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 23rd Annual GIPS Standards Conference in Scottsdale, Arizona, USA
# PREMIUM SPONSORSHIPS

## PLATINUM SPONSORSHIP

USD 11,000 | 1 Available  
6 Delegate Passes

The platinum sponsorship is an exclusive opportunity that delivers the highest level of recognition to the sponsoring firm throughout the conference's marketing campaign and live program. As the platinum sponsor, your firm is afforded strong brand exposure that visibly projects your firm's support of, and alignment with, CFA Institute. This opportunity provides your firm with brand exposure during the Networking Reception on Thursday evening and includes branding on the live broadcast site and the opportunity to submit a 15–30 second advertisement to be played on the site prior to the live broadcast. This opportunity includes a premium exhibit.

## GOLD SPONSORSHIP

USD 9,500 | 2 Available  
5 Delegate Passes

As a gold sponsor, your firm will receive significant brand recognition throughout the conference's marketing campaign and live program. This sponsorship allows sponsoring firms to have the choice of sponsoring the Networking Luncheon on either the first or second day of programming. This opportunity includes a premium exhibit.

## SILVER SPONSORSHIP

USD 8,500 | 2 Available  
4 Delegate Passes

Silver sponsors enjoy premium-level brand recognition throughout the conference's marketing campaign and live program. The silver sponsorship includes exclusive branding during the networking breaks that take place in between sessions on either the first or second day of programming. This opportunity includes a premium exhibit.

### PREMIUM SPONSORSHIP OPPORTUNITIES

<table>
<thead>
<tr>
<th></th>
<th>PLATINUM</th>
<th>GOLD</th>
<th>SILVER</th>
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<tbody>
<tr>
<td><strong>Price</strong></td>
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<td><strong>Quantities Available</strong></td>
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### Deliverables

#### Pre-event

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

#### Onsite

- Delegate passes*
- Exclusive branding at one networking luncheon on day 1 or day 2
- Exclusive branding at the networking reception on day 1
- Branding during all networking breaks on day 1 and day 2
- Branding on the Livestream website during a session**
- Premium exhibit booth space***

#### Recognition in onsite conference branding (print and/or digital signage)

#### Post-event

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

* Additional delegate passes can be purchased at the discounted group rate  
** As available  
*** Exhibit selection order is determined by the level of support and the chronological order in which reservation forms are submitted
Exhibitors can generate strong sales leads and raise their firms’ profiles 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.

The premium exhibit opportunity serves as 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.

<table>
<thead>
<tr>
<th>EXHIBIT OPPORTUNITIES</th>
<th>PREMIUM EXHIBIT</th>
<th>STANDARD EXHIBIT</th>
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<tbody>
<tr>
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<td>Deliverables</td>
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<td>Pre-event</td>
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<td>Digital recognition in the conference webpage’s Supporters section</td>
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<tr>
<td>Recognition in promotional emails and/or print advertisements</td>
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<tr>
<td>Delegate passes*</td>
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<tr>
<td>Exhibit booth space**</td>
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<td>Standard</td>
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<tr>
<td>Recognition in onsite conference branding (print and/or digital signage)</td>
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<tr>
<td>Post-event</td>
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