LATIN AMERICA INVESTMENT CONFERENCE

1–2 March 2018
Belmond Copacabana Palace
Rio de Janeiro, Brazil
HOSTED WITH CFA SOCIETY BRAZIL

SPONSORSHIP OPPORTUNITIES
The 2018 CFA Institute Latin America Investment Conference is a practitioner-oriented educational conference focused on Latin American economies and capital markets, as well as global issues relevant to investors worldwide.

In 2018, the conference will be based in Rio de Janeiro and will gather leading global investors and researchers from Brazil and the region to discuss macroeconomic trends, innovations affecting financial services, and places where investors are finding investment opportunities in the region. The conference is aimed at analysts, portfolio managers, and other senior investment professionals working in or interested in Latin American markets.

The conference, hosted jointly by CFA Institute and CFA Society Brazil, is a must-attend event for investors in Latin America. The conference features globally acclaimed speakers and a range of diverse topics and perspectives to shape investment strategies in Latin American markets.

Topics covered will include:

- How politics, government reforms, and policies in Brazil and the region will affect the investing climate
- What demographic trends tell us about Latin America investment opportunities and which sectors and companies will benefit
- How global and regional asset, risk, and strategy allocation can help achieve investment objectives for a wide range of clients from high net worth individuals to pensions and sovereign wealth funds
- Where leading equity investors are finding the best values and growth opportunities in the region and the world
- Which fixed income securities and currencies are most attractive and which global risk factors, including rising interest rates in the U.S., will affect returns going forward
- What alternative investment strategies are most effective and what are the prospects for real estate, infrastructure, energy, and agriculture.

About CFA Institute

CFA Institute is the global community of more than 146,000 investment management professionals working to build an industry in which investors’ interests come first, financial markets function at their best, and economies grow.

We are driven by the belief that lasting economic growth depends on trust, competence, and transparency in financial markets, and we know that it must be led by professionals who are ethically centered and professionally trained. In short, we are here to lead, support, and connect all who want to create a better investment profession.

We offer a world-class suite of educational offerings to employers, students, working professionals, and regulators who are shaping the future of finance. Through our formal educational programs, professional development courses, and global network of university partners, we aim to deepen financial expertise for the benefit of investors worldwide.

Top employers of CFA Institute members globally:
Bank of America Merrill Lynch · BlackRock · Citigroup · Credit Suisse · HSBC · JPMorgan Chase · Morgan Stanley · Royal Bank of Canada · UBS · Wells Fargo

About CFA Society Brazil

CFA Society Brazil is an Association of investment professionals, linked to CFA Institute by its fundamental values: professional excellence, integrity, cooperation and volunteer service. CFA Society Brazil is an organization directed by volunteers whose members occupy positions such as security and research analysts, portfolio managers, strategists, consultants, educators, and more.

Top employers of CFA® charterholders in Brazil:
Banco Bradesco · Banco do Brasil · Banco Safra · Banco Santander · BTG Pactual · Citigroup · Credit Suisse · Itaú Unibanco · JP Morgan Chase · Votorantim

To secure any of these opportunities and gain access to investment professionals attending the Latin America Investment Conference, please contact:

ANDY JENKINS
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andy.jenkins@cfainstitute.org
CONFERENCE PROGRAMMING

2018 SPEAKERS

Alberto J. Bernal-León
Chief Strategist
XP Securities

Daniel Cancel
Managing Editor for Latin America
Bloomberg

Axel Christensen
Managing Director,
Chief Investment Strategist for
Latin America and Iberia
BlackRock

Bjorn Forfang
Deputy Chief Executive Officer
CFA Institute

Daniel R. Kastholm, CFA
Regional Group Head, Latin America
Corporate Ratings
Fitch Ratings

Marcelo Barbosa
Chairman
Securities and Exchange Commission of Brazil (CVM)

Mauro Miranda, CFA
President
CFA Society Brazil

Andrea Murta
Director, Business US
JOTA

Clecius C. Peixoto, CFA
Chief Investment Officer and Portfolio Manager
Onyx Equity Management

Alexei G. Remizov
Managing Director
HSBC Securities (USA) Inc.

Roberto Rigobon
Society of Sloan Fellows Professor of Management
and Professor of Applied Economics
Sloan School of Management, Massachusetts
Institute of Technology

Carl Ross
Sovereign Analyst, Emerging Country Debt
GMO

Matias Spektor
Associate Professor of International Relations
Fundação Getulio Vargas (FGV)

Marianna Waltz, CFA
Managing Director and Regional Head of Latin
America Corporate Finance Team
Moody’s Investors Services

Sonia Villalobos, CFA, Moderator
Founding Partner
Villalobos Consultoria Ltda.

2018 LATIN AMERICA INVESTMENT
CONFERENCE SCHEDULE

Thursday, 1 March 2018

17:30–18:15  Registration
18:15–19:30  Welcoming Remarks and Opening Keynote
19:30  Welcome Reception and Networking

Friday, 2 March 2018

8:00–8:45  Registration and Networking Breakfast
8:45–9:00  Opening Comments
9:00–9:30  Opening Keynote
9:30–10:45  Politics and Policy in Latin America: Implications for Investors
10:45–11:15  Networking Refreshments
11:15–12:30  Latin American Economic Outlook: Reforms, Macrotrends,
and Investment Opportunities
12:30–14:00  Networking Lunch with Keynote Speaker
14:00–15:15  Big Data: Driving the Future of Latin America
15:15–15:45  Networking Refreshments
15:45–17:00  Investing in Latin America: Challenges and Opportunities
17:00–17:45  Closing Keynote: Challenges in Global Asset Management
17:45–18:00  Closing Remarks
18:00  Closing Reception

Please note the schedule is subject to change, and information is accurate as of 21 November.

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PREMIUM SPONSORSHIPS

PLATINUM SPONSORSHIP
BRL 20,500 | 1 Available
5 Complimentary Delegate Passes
The platinum sponsorship delivers the highest level of recognition throughout the Latin American Investment Conference's marketing campaign and live program. Your firm will be announced, recognized, and thanked during the conference by a conference chairman. As the platinum sponsor, your firm is afforded significant 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 opening keynote session and the opening evening reception on Thursday evening, as well as the closing evening reception on Friday evening. In addition, the platinum sponsorship includes brand recognition on the event's live broadcast webpage and the opportunity to submit a 15–30 second advertisement to be played on the webpage, prior to the live broadcast. This opportunity includes a tabletop exhibit.

GOLD SPONSORSHIP
BRL 14,200 | 2 Available
3 Complimentary Delegate Passes
As a gold sponsor, your firm will receive significant brand recognition throughout the conference’s marketing campaign and live program. The gold sponsors will sponsor the breaks that take place in between sessions, where their branding will appear on coffee cup sleeves, napkins, and table tents. This opportunity includes a tabletop exhibit.

SILVER SPONSORSHIP
BRL 11,100 | 2 Available
2 Complimentary Delegate Passes
Silver sponsors enjoy premium-level brand recognition throughout the conference’s marketing campaign and live program. This opportunity recognizes your firm as the networking luncheon sponsor on Friday afternoon. Silver sponsors are promoted through branded signage, table tents, and beverage napkins. This opportunity includes a tabletop exhibit.

EXHIBIT PROGRAM

STANDARD EXHIBIT
BRL 9,500 | 5 Available
2 Complimentary Delegate Passes
Exhibitors can generate strong sales leads and raise their firms’ 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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## SPONSORSHIP OPPORTUNITIES

<table>
<thead>
<tr>
<th>SPONSORSHIP OPPORTUNITIES</th>
<th>SPONSORSHIP PROGRAM</th>
<th>EXHIBIT PROGRAM</th>
</tr>
</thead>
<tbody>
<tr>
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<td>GOLD</td>
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<td>2</td>
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### DELIVERABLES

#### Pre-event

Digital recognition in the conference webpage supporter section

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

Recognition in promotional emails and/or print advertisements

#### Onsite

Complimentary delegate passes

Tabletop exhibit space*

Exclusive branding during the opening and closing receptions

Branding displayed during conference breaks

Branding displayed during the networking luncheon

Branding on Livestream website during a session**

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

#### Post-event

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

### Advertising

Insertions in the daily CFA Institute *Financial NewsBrief*

Advertising in CFA Institute member publications***

<table>
<thead>
<tr>
<th></th>
<th>3 Top Stories</th>
<th>5 Market Activity</th>
<th>3 Market Activity</th>
<th>3 Economics</th>
</tr>
</thead>
<tbody>
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* Exhibit selection order is determined by the sponsorship level and the chronological order in which reservation forms are submitted

** As available

*** CFA Institute Magazine or Financial Analysts Journal

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