



2018-2019

CFA INSTITUTE **RESEARCH CHALLENGE** **SPONSORSHIP KIT**

Big Challenge. Bigger Opportunity.

OVERVIEW

We'd like to invite you to partner with us on the CFA Institute Research Challenge. Like any great challenge, this annual initiative provides all participants—including companies like yours—with incredible opportunities.

The Research Challenge offers students a unique educational opportunity to apply what they've learned in the classroom to real-world practice in equity research.

These exemplary students may one day become portfolio managers, research analysts, and CFA Institute and society members who will lead the investment management profession in the future. As a sponsor, you will have direct exposure to these up-and-coming influencers and will be aligning your organization with a competition that is having a meaningful impact on the future of the industry.

We offer various sponsorship programs from premium sponsorships and exhibitor programs to branding and engagement opportunities. If you're ready to step up to this challenge and seize the exposure and recognition opportunities it brings, please contact:

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How Does the Research Challenge Work?

Local CFA Societies work with universities to assemble teams of three to five undergraduate and/or graduate students. Teams research and analyze a designated publicly traded company; prepare a written report on that company that supports a buy, sell, or hold recommendation; receive advice and support from a faculty advisor and an industry mentor; and present and defend their findings to a panel of industry experts.

Most students spend 125-175 hours researching their assigned company and assembling their report and presentation. Each local competition lasts approximately four months with competitions kicking off between June and December.

Winners from the local competitions advance to one of three regional competitions in the Americas, Asia Pacific, and Europe, Middle East, and Africa, culminating in a global final.



Asia Pacific Regional

28-29 March 2019
Sydney, Australia



EMEA Regional

10-11 April 2019
Zurich, Switzerland



Americas Regional and Global Final

23-25 April 2019
New York, USA

ABOUT CFA INSTITUTE

CFA Institute is a global community of investment professionals working to build an investment management industry where 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.

We are here to lead, support, and connect all who want to create a better investment industry.

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



PROGRAM DEMOGRAPHICS

University teams begin their activities in the fall, with local competitions occurring throughout the world at various times early in the calendar year. Regional competitions and the global final are held in March and April.

[View the 2016-2017 season's wrap up video >](#)

[View list of participating universities >](#)



2017 Research Challenge Wrap Up Video

2018 Participation Data

5,700

Students

3,500

Volunteers

147

CFA Societies

1,100

Universities

112

Local Challenges

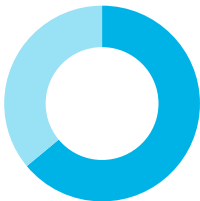
85

Countries

Gender Participation

36%

Female



64%

Male

CFA Program Candidates Rate

72%

Non-CFA
Candidates



28%

CFA Candidates

28% of students are CFA candidates at the time of competition kickoff

Level of Education

32%

Graduate



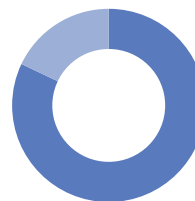
68%

Undergraduate

Interest Rate in Enrolling in CFA Program

18%

Not
Interested



82%

Interested

82% of students not already enrolled in the CFA Program are interested in doing so

PREMIUM SPONSORSHIPS

Partner with CFA Institute to enhance the value of the Research Challenge and promote the highest standards of ethics, education, and professional excellence for the ultimate benefit of society. Premium Sponsors receive the highest recognition of support through the competition.

Premium sponsors are part of the core investment management industry. These are firms (or larger firm business lines) primarily engaged in asset management (mutual funds, hedge funds, private equity, real estate investment, investment research and ratings, and

investment advisory services), wealth management, fiduciary asset ownership (such as pension funds, endowments, and sovereign wealth funds), their related regulators and standard setters, and data services providers.



Global Platinum

USD \$100,000 | 1 Available

The Global Platinum Sponsor is recognized at the highest level as the premier sponsor throughout the local, regional, and global competitions of the Research Challenge. This sponsorship features high level recognition throughout all facets of the program and provides robust engagement opportunities with students and faculty members.



Global Gold

USD \$60,000 | 2 Available

The Global Gold Sponsor allows your firm to receive significant brand recognition throughout the local, regional, and global competitions of the Research Challenge. This sponsorship features recognition throughout the program and provides engagement opportunities with students and faculty members.



Regional Silver

AMER: USD \$30,000

APAC: USD \$15,000

EMEA: USD \$20,000

1 Per Region Available

The Regional Silver Sponsor receives premium recognition throughout a specific regional competition of the Research Challenge. This sponsorship features brand recognition during the live event and provides engagement opportunities with students and faculty members.

Global Premium Opportunities	Global Platinum	Global Gold	Regional Silver*
Price	USD \$100,000	USD \$60,000	AMER: USD \$30,000 APAC: USD \$15,000 EMEA: USD \$20,000
Quantity Available	1	2	1 per region
Deliverables			
General			
Two-time use of opt-in university student and university faculty contact list for all local competitions globally	•	•	
Brand exposure in program registration emails	•	•	
Digital recognition on the Research Challenge webpages	•	•	
Logo recognition on the Research Challenge fact sheet	•	•	
Recognition in social media postings	•	•	•
Pre-Event			
One-time use of opt-in university student and university faculty contact list for regional competitions	•	•	•
Recognition in the supporters section of the Research Challenge event microsite	•	•	•
Regional Final judge nomination	•	•	•
Global Final judge nomination	•	•	
Onsite			
Premium exhibit space	•	•	•
Brand recognition on attendee badge	•		
Recognition on signage	•	•	•
Recognition in the supporters section of the event app	•	•	•
Brand recognition on splash page of the event app	•		
Banner ad in the event app	•	•	•
In-app engagement opportunities	•	•	•
Branding recognition during the Research Challenge Livestream events	•	•	•
Podium presence during the Global Final	5 minutes	3 minutes	3 minutes
Brand recognition during all three regional opening receptions	•	•	
Brand recognition during all three regional lunches	•	•	
Invitation to Global Finalist lunch	•	•	
Brand recognition during Global Final reception	•	•	
Brand recognition during Regional Final reception			•
Brand recognition during corporate social responsibility activity at the Global Final	•		
Event passes per event	6 passes at each event	4 passes at each event	4 passes at event
Photos with Global Finalists and Global Champion	•	•	
Photos with Regional Champion			•
Post-Event			
One-time use of opt-in university student and university faculty contact list for regional competitions	•	•	•

EXHIBIT PROGRAM

Exhibitors can generate strong leads and raise their firm's profile through this effective opportunity to reach and interact face-to-face with students, university faculty, and CFA Institute volunteers. Display and market your firm's products and services directly to this unique group of future investment management professionals.

Prep Providers

In an increasingly competitive job market, many university students pursue professional certifications and designations once they enter the investment industry. The CFA® designation is a popular option among students who participate in the CFA Institute Research Challenge. Increase your pipeline and promote your company's study-prep services to students and university faculty.

Data And Service Providers

Interact with students and university faculty onsite and give an overview of how your product can assist them throughout their career. Exhibitors may work with university faculty to encourage product adoption among future Research Challenge teams and university students in the classroom.

Industry Firms

Industry exhibitors have the unique opportunity to connect with the next generation of investment management professionals as they complete their studies and prepare to enter the job market.

Regional Event Sponsorship Opportunities	Exhibitor	Corporate Supporter
Price	AMER: USD \$5,500 APAC: USD \$4,500 EMEA: USD \$5,000	USD \$1,000
Deliverables		
Pre-Event		
One-time use of opt-in university student and university faculty contact list for specific regional competitions	•	
Recognition in the supporters section of the Research Challenge microsite	•	•
Onsite		
Table top exhibit stand	•	
Recognition on signage	•	•
Recognition in the supporters section of the event app	•	•
Event passes	3	2
Post-Event		
One-time use of opt-in university student and university faculty contact list for specific regional competitions	•	

BRANDING AND ENGAGEMENT OPPORTUNITIES

Subject Company Tear Sheets

Subject company tear sheets are given to competition judges and audience members via the event app to provide an overview of each team's subject company. This exclusive opportunity allows a data services provider to create the tear sheets thus engaging with industry professionals.

Number of Subject Companies



Professional Headshot Station

As the Professional Headshot Station sponsor, your firm will offer the opportunity to all attendees to have a professional headshot taken. This sponsorship allows your firm to enjoy branding through onsite signage.

Event App Engagement

Our event app is an essential component of the onsite experience. Enhance your firm's presence within the app with banner ad exposure, a push notification, and quizzes.

Branding Opportunities	Tear Sheets	Headshots	App Engagement
Price	AMER: USD \$3,000 APAC: USD \$2,000 EMEA: USD \$2,500	AMER: USD \$3,000 APAC: USD \$2,000 EMEA: USD \$2,500	AMER: USD \$500 APAC: USD \$300 EMEA: USD \$400
Deliverables			
Pre-Event			
Recognition in the supporters section of the Research Challenge microsite	•	•	•
Onsite			
Tear sheets provided to judges electronically and in print	•		
Branding displayed at the headshot station area		•	
Banner ad in the event app, a push notification, and gamification opportunities			•
Recognition on signage	•	•	•
Recognition in the supporters section of the event app	•	•	•
Event Passes	2 per event	2 per event	2 per event

BRANDING AND ENGAGEMENT OPPORTUNITIES

Local Level Competition Participant Email List

Access to the local level participant email list allows your firm a direct connection with the 5,700 students from over 80 countries that will participate in the competition. This opportunity allows you to gain access to all of these students and faculty members while they are still actively doing their research and analysis.

Local Level Competition Sponsorship Support	Americas	Asia Pacific	EMEA	Global
Price	USD \$15,000	USD \$6,000	USD \$10,000	USD \$30,000
Two-time use of opt-in university student and university faculty contact list for local competitions	All local competitions in region	All local competitions in region	All local competitions in region	All local competitions globally

Become a Sponsor

To secure any of these opportunities and gain access to university faculty and students attending the CFA Institute Research Challenge, please contact:

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