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WOMEN IN INVESTMENT MANAGEMENT: OPENING DOORS SPONSORSHIP KIT

18–19 September 2019 | Hotel Omni Mont-Royal |
Montréal, QC, Canada

Hosted with CFA Montréal

OVERVIEW

Investment firms are opening doors and providing opportunities to foster a diverse workforce, create better outcomes for investors, and provide greater opportunities in finance to women around the world.

The 2019 Women in Investment Management conference will focus on pathways to achieve success—for individual careers, for investment teams, and for those in leadership positions. Attendees will come away with practical strategies for reaching their goals at all stages of their investment careers.

This conference will provide a forum for women and those from diverse backgrounds to network, exchange ideas, and develop connections to help them succeed as investment professionals. Attendees will have the opportunity to learn from and build relationships with role models, industry executives, and peers.

Conference speakers will:

- Share how to attract, retain, and engage women in the investment management industry
- Present research and insights on gender bias and diversity issues, and how to counter bias and address obstacles
- Discuss what industry participants are doing in partnership to promote diversity in global finance
- Inspire with personal experiences about leadership and overcoming career challenges
- Provide practical takeaways and next steps for implementing change at their firms
- Deliver skill-building and career development tips and strategies
- Highlight investment advice for those working in the industry

The conference will allow attendees to meet passionate women in the investment industry, increase their skills and knowledge, and apply constructive career tools to help open doors and mark a pathway to success.



To secure any of these opportunities and gain access to investment professionals attending the Women in Investment Management conference, please contact:

Andy Jenkins

Director, Global Sponsorship
Programs
+1 (434) 951-5594
andy.jenkins@cfainstitute.org

ABOUT CFA INSTITUTE

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 172,000 members in 164 countries and regions, including 165,000 CFA® charterholders, and 154 member societies.

Top employers of CFA Institute Members globally:

- Bank of America Merrill Lynch
- BlackRock
- Citigroup
- Goldman Sachs
- HSBC
- JPMorgan Chase
- Morgan Stanley
- Royal Bank of Canada
- UBS
- Wells Fargo

ABOUT CFA MONTRÉAL

A leader in the investment profession, CFA Montréal is made up of more than 2,700 professionals and 2,500 candidates who have chosen the unique expertise offered by the CFA® program and contribute to the growth of Montreal's financial sector and economy.

Top employers of CFA® charterholders in Montréal:

- BMO Financial Group
- Caisse de Depot et Placement du Quebec
- CIBC World Markets Inc.
- Desjardins Group
- Fiera Capital Corporation
- Laurentian Bank of Canada
- National Bank of Canada
- PSP Investments
- RBC
- TD Bank Financial Group

CONFERENCE DEMOGRAPHICS

A broad spectrum of investment professionals are expected to attend the 2019 Women in Investment Management conference.

Our conference delegates are primarily portfolio managers, analysts, strategists, financial advisers, and heads of investment firms who have worked in the investment industry for more than 20 years. Both institutional and private wealth investment managers are represented.

The demographic profile reflects data from the 2018 Diversity and Inclusion Conference in San Francisco, California, USA

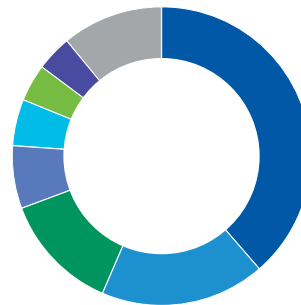
Delegate Attendance

164

CFA Institute Membership Status

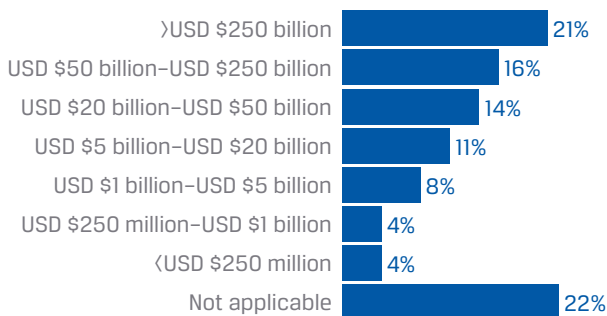


Delegate Occupation

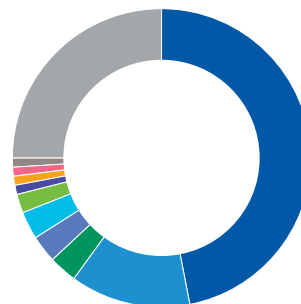


- Portfolio Manager (39%)
- Consultant (18%)
- Relationship Manager (13%)
- Chief-Level Executive (7%)
- Manager of Managers (5%)
- Performance Analyst (4%)
- Research Analyst (4%)
- Other (11%)

Employer AUM (USD)

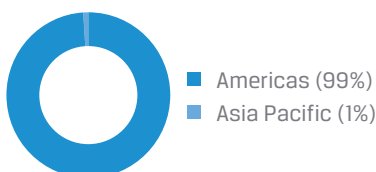


Primary Investment Practice

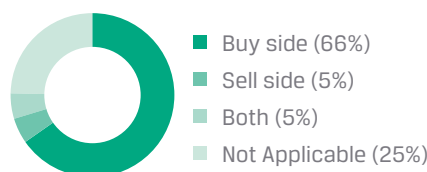


- Equities (47%)
- Fixed Income (13%)
- Generalist (3%)
- Hedge Funds (3%)
- Private Equity (3%)
- Derivatives (2%)
- FX/Currency (1%)
- Pension Fund Investment (1%)
- Real Estate (1%)
- Structured Products (1%)
- Other (25%)

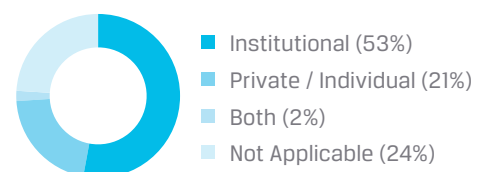
Region



Buy Side/Sell Side



Primary Asset Base



PREMIUM SPONSORSHIPS

PLATINUM SPONSORSHIP

CAD 26,000 | 1 Available
8 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 opening keynote session and the opening evening reception. This opportunity includes a premium exhibit.

GOLD SPONSORSHIP

CAD 13,400 | 2 Available
6 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 a firm to sponsor a programming session. The gold sponsors will also 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 premium exhibit.

SILVER SPONSORSHIP

CAD 8,700 | 3 Available
4 Delegate Passes

Silver sponsors enjoy premium-level brand recognition throughout the conference's marketing campaign and live program. This opportunity recognizes your firm as a networking luncheon sponsor. Silver Sponsors are promoted through branded signage, table tents, and beverage napkins. This opportunity includes a premium exhibit.

| PREMIUM SPONSORSHIP OPPORTUNITIES | PLATINUM | GOLD | SILVER |
|--|------------|------------|-----------|
| Price | CAD 26,000 | CAD 13,400 | CAD 8,700 |
| Quantity Available | 1 | 2 | 3 |
| Deliverables | | | |
| Pre-event | | | |
| Digital recognition on the dedicated conference website's homepage | • | | |
| 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* | 8 | 6 | 4 |
| Tabletop exhibit space** | • | • | • |
| Branding displayed during the opening reception | • | | |
| Branding displayed during a Livestream broadcast session*** | • | • | |
| Premium brand recognition in the conference mobile app | • | | |
| Brand recognition in the conference mobile app | • | • | • |
| Branding displayed during conference breaks | | • | |
| Branding displayed during the networking luncheon | | | • |
| 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 member rate of CAD \$1095 (before 31 July) and CAD \$1295 (after 31 July)

** Exhibit selection order is determined by the level of support and the chronological order in which reservation forms are submitted

*** As available

EXHIBIT PROGRAM

PREMIUM EXHIBIT

CAD 7,400 | 3 Available
3 Delegate Passes

Exhibitors will have the unique opportunity to raise their firms' profiles in the investment community through face-to-face interactions with professionals in the financial services industry. Exhibits should focus on engaging attendees and offering career advice, discussing specific roles and employment opportunities, and promoting the diversity initiatives being practiced within their firms. 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. Exhibit selection order is determined by the sponsorship level and the chronological order in which reservation forms are submitted.

STANDARD EXHIBIT

CAD 6,000 | 6 Available
2 Delegate Passes

CFA Institute is required to charge exhibitors GST and/or QST for tax purposes. Guiding principles follow:

- **Non-Canadian:** EXEMPT
- **Canadian-other:** 5.0% GST
- **Canadian-Quebec:** 14.97% QST (5.0% GST and 9.97% QST)

| EXHIBIT OPPORTUNITIES | PREMIUM EXHIBIT | STANDARD EXHIBIT |
|--|-----------------|------------------|
| Price | CAD 7,400 | CAD 6,000 |
| Quantity Available | 3 | 6 |
| Deliverables | | |
| Pre-event | | |
| Digital recognition in the conference webpage's supporter section | • | • |
| One-time use of the opt-in delegate mailing and email list | • | • |
| Onsite | | |
| Delegate passes* | 3 | 2 |
| Tabletop exhibit space** | • | • |
| Brand recognition in the conference mobile app | • | • |
| 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 member rate of CAD \$1095 (before 31 July) and CAD \$1295 (after 31 July)

** Exhibit selection order is determined by the level of support and the chronological order in which reservation forms are submitted

BRANDING OPPORTUNITIES

ADVOCATE PLUS SPONSORSHIP

CAD 4,500 | Unlimited Availability*
3 Delegate Passes

The advocate plus sponsorship serves as an upgraded option to the advocate sponsorship and includes a pre- and post-conference attendee mailing list, along with one additional complimentary conference registration.

As an advocate sponsor, your firm is showing its commitment of support for gender diversity and the career development of women in the financial services industry. Our advocate sponsors are recognized on our conference website and onsite housekeeping slides for their corporate financial support to the conference. Firms will also receive complimentary delegate passes for their representatives to attend the event and participate by sharing their thoughts, networking with industry leaders, and building their careers.

ADVOCATE SPONSORSHIP

CAD 2,800 | Unlimited Availability*
2 Delegate Passes

| BRANDING OPPORTUNITIES | ADVOCATE PLUS | ADVOCATE |
|--|-------------------------|-------------------------|
| Price | CAD 4,500 | CAD 2,800 |
| Quantity Available | Unlimited Availability* | Unlimited Availability* |
| Deliverables | | |
| Pre-event | | |
| Digital recognition in the conference webpage's supporter section | • | • |
| One-time use of the opt-in delegate mailing and email list | • | |
| Onsite | | |
| Delegate passes** | 3 | 2 |
| Brand recognition in the conference mobile app | • | • |
| Recognition in onsite conference branding (print and/or digital signage) | • | • |
| Post-event | | |
| One-time use of the opt-in delegate mailing and email list | • | |

* Advocate and Advocate Plus Sponsorships will remain unlimited until event capacity is reached.

** Additional delegate passes can be purchased at the member rate of CAD \$1095 (before 31 July) and CAD \$1295 (after 31 July).