WOMEN IN INVESTMENT MANAGEMENT: ACCESS TO SUCCESS IN A CHANGING INDUSTRY
SPONSORSHIP KIT

14–15 October 2020 | Virtual Event
The investment industry is in a state of upheaval: the rise of machine learning and AI, the need for greater personalization in investing, and increased demand for stewardship and a broader appreciation of Social factors in ESG - all challenges accelerated by Covid-19.

Solving for these changes demands a diverse talent pool, an inclusive work culture, and a collaborative leadership mindset. The 2020 Women in Investment Management virtual conference will inform you about the opportunities that change brings, share developments on using technology to enhance and maintain diversity of thought and inclusive cultures, share evolving investment strategies, and provide insight from industry leaders on how to adapt to thrive. The virtual conference will also provide insights by career development experts and offer unique opportunities for networking and exchanging ideas.

Conference speakers will:
- Share insights from industry and educational leaders on rising to the challenge of including women of color in the investment industry.
- Present investment insights and strategies for investing with impact.
- Share research on methods to improve investment decision making.
- Provide practical take-aways and inspiration from stories of women of color who have changed the world in STEM careers.
- Share insight on the use of AI to attract, retain, and engage women and those of diverse backgrounds in investment management.
- Provide career development and investing insights based on their industry experience and career journey.
- Deliver skill-building and career development tips and strategies

Join us for this virtual conference that will provide practical information for individuals, investment teams, and those in leadership positions to access success in a changing industry.

This year we are offering virtual sponsorship/exhibit opportunities in support of this event. To secure any of these opportunities and gain access to investment professionals attending the Women in Investment Management conference, please contact:

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CFA Institute is the global community of 175,000+ 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.

**Top Occupations of Members Globally**

- Portfolio Manager (19%)
- Research Analyst (15%)
- Consultant (7%)
- Financial Adviser (5%)
- Risk Analyst (5%)
- Corporate Financial Analyst (5%)
- Investment Strategist (3%)
- Trader (3%)
- Manager of Managers (3%)
- Chief Executive Officer (3%)
- Relationship Manager (3%)
- Accountant (3%)
- Sales Agent (2%)
- Chief Investment Officer (2%)
- Chief Financial Officer (2%)
- Credit Analyst (2%)
- Investment Consultant (2%)
- Information Technology (1%)
- Professor (1%)
- Performance Analyst (1%)
- Regulator (1%)
- Compliance Analyst (1%)
- Other (11%)

**Investment Practice**

- Equities (29%)
- Fixed Income (17%)
- Generalist (11%)
- Private Equity (6%)
- Real Estate (4%)
- Derivatives (2%)
- Hedge Funds (2%)
- Structured Products (2%)
- FX/Currency (1%)
- Commodities (1%)
- Venture Capital (1%)
- ESG Investments (1%)
- High Yield (1%)
- Other (8%)
- Not Applicable (14%)

**Years in Industry**

- 2% 5 years or less
- 19% 6 to 10 years
- 24% 11 to 15 years
- 17% 16 to 20 years
- 38% over 20 years

**Top 25 employers of CFA Institute Members globally**

- JP Morgan Chase
- RBC
- Bank of America Merrill Lynch
- UBS
- HSBC
- 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

**Region**

- Americas (57%)
- EMEA (23%)
- APAC (20%)
**Platinum Sponsorship**  
USD 10,000 | 1 Available | 6 Conference Registrations

The platinum sponsorship is an exclusive opportunity that delivers the highest level of recognition for the sponsoring firm throughout the conference's marketing campaign and the virtual conference environment. 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 in the theater, lobby, exhibit hall, networking lounge, and at the info desk. Contribute to the program by providing promotional video(s) to be played between video feed transitions. This opportunity includes a tier 1 exhibit.

**Gold Sponsorship**  
USD 8,000 | 2 Available | 4 Conference Registrations

As a gold sponsor, your firm will receive significant brand recognition throughout the conference's marketing campaign and the virtual conference environment. This opportunity provides your firm with brand exposure in the lobby and exhibit hall. Your firm will also have the opportunity to submit promotional video(s) to be played between video feed transitions. This opportunity includes a tier 2 exhibit.

**Silver Sponsorship**  
USD 5,000 | 16 Available | 3 Conference Registrations

Silver sponsors enjoy brand recognition throughout the conference's marketing campaign and in the virtual conference environment. This opportunity provides your firm with brand exposure in the exhibit hall. Along with the platinum and gold sponsors, the silver sponsorship includes brand recognition in housekeeping slides, on the conference webpage, and access to the pre and post-event opt-in attendee lists. This opportunity includes a tier 3 exhibit.
## VIRTUAL SPONSORSHIPS

<table>
<thead>
<tr>
<th>VIRTUAL SPONSORSHIP OPPORTUNITIES</th>
<th>PLATINUM</th>
<th>GOLD</th>
<th>SILVER</th>
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<tbody>
<tr>
<td>Price</td>
<td>USD 10,000</td>
<td>USD 8,000</td>
<td>USD 5,000</td>
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<tr>
<td>Quantity Available</td>
<td>1</td>
<td>2</td>
<td>16</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

#### Days of event

- Conference registrations*: 6, 4, 3
- Virtual exhibit space: Tier 1, Tier 2, Tier 3
- Opportunity to submit promotional video(s) (15-30 seconds) to be played between video feed transitions on the online platform
- Branding in various sections of the virtual conference: Theater, Lobby, Exhibit Hall, Networking Lounge, Info Desk

#### 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