



CFA Institute

# Sponsorship Opportunities

2023-2024 | CFA Institute

# 75 YEARS OF CONFERENCE EXCELLENCE

CFA Institute conferences are designed to deliver relevant, timely, and objective industry knowledge, deepen professional connections, and elevate career goals.

We bring together practitioners, C-suite, and thought leaders to gain and share insights into the latest investment trends to guide professionals working to build an industry in which investors' interests come first, financial markets function at their best, and economies grow. CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials.



The organization is a champion of ethical behavior in investment markets and a respected source of knowledge in the global financial community. There are more than **180,000 CFA® charterholders worldwide in 160 markets.**

## CONVENING POWER YOU CAN TRUST

Our track record speaks for itself.

- CFA Institute Annual Conference
- Middle East Investment Conference
- India Investment Conference in partnership with CFA Society India
- Climate Risk and Returns and Asset and Risk Allocation (USA)
- GIPS® Standards Annual Conference
- Webinars and podcasts focused on AI, private markets, ESG, and more

Get front-row seats to the excitement: [Watch our promo videos from past conferences!](#)

### CONTACT US

To secure any of these opportunities and gain access to investment professionals attending CFA Institute programming, please contact:

**Jon Gentry**  
Senior Manager, Sponsor & Event Partnerships  
(434) 981-6028  
[jonathan.gentry@cfainstitute.org](mailto:jonathan.gentry@cfainstitute.org)

# EXPANSIVE GLOBAL NETWORK

The world's largest association of investment professionals.

Our large global network of members and relationships with key financial organizations, universities and regulators around the world provides global connectivity and a medium through which to engage on key industry issues and to positively affect the investment profession.

## AMERICAS

100,475 CFA charterholders

92 CFA Societies

48,435 CFA Program candidates

344 Affiliated Universities

## EMEA

39,138 CFA charterholders

47 CFA Societies

36,483 CFA Program candidates

210 Affiliated Universities

## ASIA PACIFIC

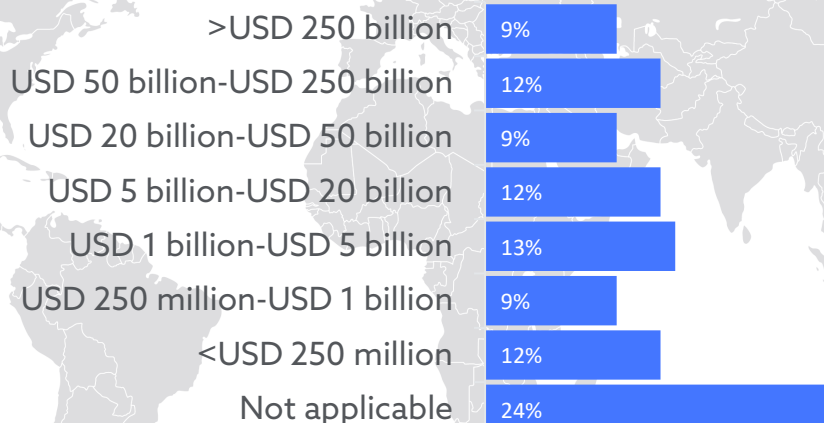
35,911 CFA charterholders

21 CFA Societies

118,964 CFA Program candidates

174 Affiliated Universities

## Employer Assets Under Management



## Top Job Roles

Portfolio Manager  
Investment Analyst  
Wealth Manager  
Risk Analyst

## Investment Focus

Equities  
Fixed Income  
Private Equity  
Real Estate

## Top Firm Types

Asset Management  
Commercial Bank  
Investment Bank  
Private Wealth Management



CFA Institute



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GROWTH BOOSTERS

- Goods & Services Tax (GST)
- Digital India
- Mobile Payments
- Financial Inclusion
- Health Care
- Education



# Conferences

2023-2024 | CFA Institute



**CFA Institute**

# GIPS® Standards Annual Conference



17-18 October 2023  
Loews Chicago Hotel  
Chicago, Illinois, USA

**SPONSORSHIP OPPORTUNITIES**

## EVENT OVERVIEW

A premier event for performance and compliance professionals from both investment management firms and asset owners to learn about the newest developments with the Global Investment Performance Standards (GIPS®) and the latest trends and challenges in investment performance.

This year's conference will feature sessions on OCIO providers, the SEC Marketing Rule and Private Funds proposal, and outsourcing considerations.

Join us at the Loews Chicago Hotel to hear from industry experts and network with industry colleagues.



## CORE AUDIENCE

- Performance analyst
- Consultant
- Compliance analyst
- Accountant

## AGENDA THEMES

- SEC Marketing Rule
- Private Funds proposal
- OCIO providers
- Outsourcing considerations

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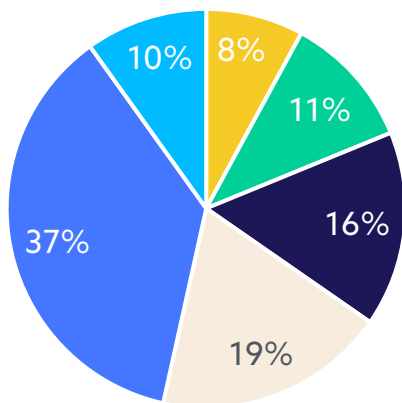
# EVENT DEMOGRAPHICS

The delegate profile reflects data from the 26<sup>th</sup> Annual GIPS® Standards Conference (2022)

## 493 Total registrations

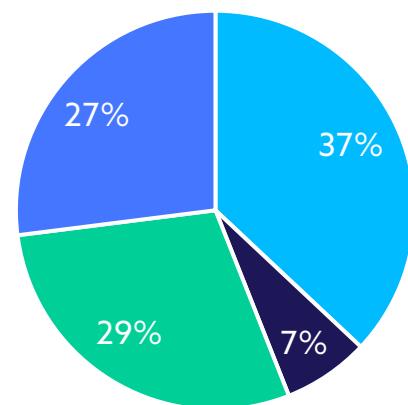
### 345 In-Person + 148 Digital Content Package

YEARS IN THE INDUSTRY



- 5 Years or Less
- 6 to 10 Years
- 11 to 15 Years
- 16 to 20 Years
- Over 20 Years
- Not Applicable

PRIMARY ASSET BASE



- Institutional
- Private/Individual
- Both
- Not Applicable

## TOP EMPLOYER TYPES

- 55% Asset Management/Investment Firm
- 7% Consulting Firm
- 6% Information Technology
- 6% Verification Firm
- 4% Accounting Firm

## TOP OCCUPATIONS

- 35% Performance Analyst
- 10% Consultant
- 8% Compliance Analyst
- 6% Accountant or Auditor
- 3% Manager of Managers

# PREMIUM SPONSORSHIPS

## TITLE SPONSORSHIP

**SOLD OUT**

6 Complimentary Delegate Passes

This premier sponsorship recognizes your firm as the leading supporter of the event and includes an extensive list of features that promotes your firm's brand along with your firm's products and services to our conference attendees.

## ASSOCIATE SPONSORSHIP

**SOLD OUT**

4 Complimentary Delegate Passes

The Associate Sponsorship allows your firm to generate leads on-site, access key stakeholders and decision makers, and strengthen its brand reputation amongst our conference attendees.

## STANDARD EXHIBIT

2 Complimentary Delegate Passes

As an Exhibitor, your firm will receive a standard tabletop booth in our exhibit space at the Loews Chicago Hotel. This provides your firm the opportunity to engage with key stakeholders and decision makers in-person.

SPONSORSHIP OPPORTUNITIES	Title Sponsorship	Associate Sponsorship	Standard Exhibit
<b>Quantity Available</b>	<b>SOLD OUT</b>	<b>SOLD OUT</b>	<b>7/14 Avail</b>
<b>Deliverables</b>			
<b>Exclusivity</b>			
Exclusive sponsorship	•		
<b>Conference Passes</b>			
Complimentary registrations (includes in-person & digital)	6	4	2
Opportunity to purchase additional conference passes at a discount	•	•	•
<b>Lead Generation</b>			
Opt-in attendee email list	2x Use	2x Use	1x Use
Opt-in digital email list	2x Use		
<b>Branding &amp; Promotion</b>			
Recognition in promotional emails	•	•	
Logo inclusion on conference website	•	•	•
Logo inclusion on event signage	•	•	
Logo inclusion on digital platform	•		
Sponsor banner ad on digital platform	•		
Audible recognition of sponsorship by host or moderator	•	•	•
30-second sponsored commercial to air between sessions	2	1	
30-minute on-demand session on digital platform	•		
<b>Activation</b>			
Premium (double) booth space	•		
Standard booth space		•	•
Priority in booth election process	•	•	
Post-event digital report	•		
Sponsor recognition at a networking reception	•		
Sponsor recognition at lunch on day 1 and day 2	•		



# BRAND & AMENITY SPONSORSHIPS

## WELCOME RECEPTION SPONSOR

1 Available  
2 Complimentary Delegate Passes

- Exclusive brand recognition during the pre-event networking reception
- 1-time use of the pre-event opt-in attendee list
- 2 complimentary conference registrations
- Logo inclusion on conference website
- Logo inclusion on event signage

## DELEGATE WELCOME GIFT SPONSOR

1 Available  
2 Complimentary Delegate Passes

- \$5 Starbucks gift card for each attendee ("Brought to you by [Sponsor]")
- Sponsor-provided handout for each attendee as they check in to the hotel
- 1-time use of the pre-event opt-in attendee list
- 2 complimentary conference registrations
- Logo inclusion on conference website
- Logo inclusion on event signage

## DELEGATE BADGE SPONSOR

1 Available  
2 Complimentary Delegate Passes

- Sponsor logo included on all conference delegate badges
- 1-time use of the pre-event opt-in attendee list
- 2 complimentary conference registrations
- Logo inclusion on conference website
- Logo inclusion on event signage

## SPECIALTY COFFEE STATION SPONSOR

1 Available  
2 Complimentary Delegate Passes

- Branded coffee cup sleeves and beverage napkins
- Branded signage at the specialty coffee station
- 1-time use of the pre-event opt-in attendee list
- 2 complimentary conference registrations
- Logo inclusion on conference website
- Logo inclusion on event signage

## WI-FI SPONSOR

**SOLD OUT**  
2 Complimentary Delegate Passes

- Recognition as the exclusive Wi-Fi sponsor
- Logo recognition on the conference Wi-Fi splash page
- Opportunity to customize conference Wi-Fi network name and password
- Logo printed on Wi-Fi instructions signage at registration
- 1-time use of the pre-event opt-in attendee list
- 2 complimentary conference registrations
- Logo inclusion on conference website
- Logo inclusion on event signage

## NETWORKING BREAK SPONSOR

3 Available  
2 Complimentary Delegate Passes

- Brand recognition during a networking break (dessert napkins, signage)
- 1-time use of the pre-event opt-in attendee list
- 2 complimentary conference registrations
- Logo inclusion on conference website
- Logo inclusion on event signage

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**CFA Institute**

# Middle East Investment Conference



February 2024  
Riyadh, Saudi Arabia

**SPONSORSHIP OPPORTUNITIES**

# EVENT OVERVIEW

Held under the patronage of a Saudi government ministry, the 2024 Middle East Investment Conference, hosted by CFA Institute and CFA Society Saudi Arabia, will bring together more than 500 senior professionals, policymakers, industry experts, and key market participants to address the key trends shaping Saudi Arabia and the wider MENA region.

In addition to renowned keynote speakers and interactive networking opportunities, this landmark event will feature C-suite panel debates and in-depth interviews with leading government figures.

The conference will also host the CFA Society Saudi Arabia 2023 Charter Award Ceremony—the annual gala reception celebrating the achievements of those receiving their CFA® charter—which all sponsors are warmly invited to join.



## CORE AUDIENCE

- Asset owners
- Asset managers
- C-Suite and board members of MENA listed companies
- Management of government and regulatory bodies shaping the Saudi Arabia economy, and wider MENA region
- Energy investors
- Tech companies tackling climate change through innovation

## AGENDA THEMES

- Capital market resiliency and regulatory developments
- Energy transition—Outlook and opportunities
- The rise of AI and machine learning
- Geopolitics
- Diversity driven edge—Nurturing diverse teams and organizations for economic growth

### CONTACT US

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**Delme Thompson**  
Head, Global Event Solutions  
+44 (0)20 7330 9516  
[delme.thompson@cfainstitute.org](mailto:delme.thompson@cfainstitute.org)

# PREMIUM SPONSORSHIPS

## PLATINUM SPONSORSHIP

20 Complimentary Delegate Passes

This premier sponsorship recognizes your firm as the leading supporter of the event and includes an extensive list of features that promotes your firm's brand along with your firm's products and services to our conference attendees.

## GOLD SPONSORSHIP

15 Complimentary Delegate Passes

This premier sponsorship recognizes your firm as an impactful supporter of the event and includes an extensive list of features that includes brand, lead gen, and thought leadership deliverables.

## SILVER SPONSORSHIP

5 Complimentary Delegate Passes

The Silver Sponsorship allows your firm to generate leads on-site, access key stakeholders and decision makers, and strengthen its brand reputation amongst our conference attendees.

## STANDARD EXHIBIT

2 Complimentary Delegate Passes

As an Exhibitor, your firm will receive a standard tabletop booth in our exhibit space. This provides your firm the opportunity to engage with key stakeholders and decision makers in-person.

SPONSORSHIP OPPORTUNITIES	Platinum Sponsorship	Gold Sponsorship	Silver Sponsorship	Standard Exhibit
<b>Quantity Available</b>	<b>2</b>	<b>2</b>	<b>5</b>	<b>14</b>
<b>Deliverables</b>				
<b>Conference Passes</b>				
Complimentary registrations	20	15	5	2
Opportunity to purchase additional passes at a discount	•	•	•	•
<b>Lead Generation</b>				
Opt-in attendee email list	2x Use	1x Use		
Opportunity to contact attendees through the mobile app	•	•	•	•
<b>Thought Leadership</b>				
Solo speaking opportunity	•			
Panel speaking opportunity		•		
Opportunity to host 20-minute lunchtime session	•			
<b>Branding, Promotion, &amp; Activation</b>				
Recognition in promotional emails	•	•		
Logo inclusion on conference website	•	•	•	•
Logo inclusion on event signage	•	•		
Exhibit booth space	2	1	2	1
Priority in booth selection process	•	•	•	
Audible recognition by host or moderator	•	•		
30-second commercial to air between sessions	2	1		

# BRAND & AMENITY SPONSORSHIPS

## DINNER & CHARTER AWARD CEREMONY

1 Available  
10 Complimentary Delegate Passes

- Exclusive sponsorship
- 2 delegate passes
- Branding displayed during the opening dinner & charter award ceremony
- Logo inclusion on conference website
- Logo inclusion on event signage

## BADGE & REGISTRATION SPONSOR

1 Available  
10 Complimentary Delegate Passes

- Exclusive sponsorship
- 1x use of the opt-in attendee email list
- 2 delegate passes
- Full co-branding of registration desk
- Logo included on all delegate badges
- Logo included on all lanyards
- Logo inclusion on conference website
- Logo inclusion on event signage

## MOBILE APP & WI-FI SPONSOR

1 Available  
10 Complimentary Delegate Passes

- Exclusive sponsorship
- 2 delegate passes
- Opportunity to customize WIFI SSID & password
- Custom Wi-Fi login splash page
- Wi-Fi login URL redirect
- Branded tent cards in plenary hall (login details)
- Custom banner ad in the conference mobile app
- Logo inclusion on event signage

## SPECIALTY COFFEE STATION SPONSOR

1 Available  
8 Complimentary Delegate Passes

- Exclusive sponsorship
- 2 delegate passes
- Branded signage at the specialty coffee station
- Logo printed on coffee cup sleeves and beverage napkins
- Logo inclusion on conference website
- Logo inclusion on event signage

## CAREER CENTER & HEADSHOT SPONSOR

1 Available  
8 Complimentary Delegate Passes

- Exclusive sponsorship
- 2 delegate passes
- Branding displayed at the headshot station
- Logo inclusion on headshot proof
- Logo inclusion on conference website
- Logo inclusion on event signage

## SNACK SHACK SPONSOR

1 Available  
8 Complimentary Delegate Passes

- Exclusive sponsorship
- 2 delegate passes
- Branding included on snack shacks
- Logo inclusion on conference website
- Logo inclusion on event signage

## MOBILE CHARGING STATION SPONSOR

1 Available  
5 Complimentary Delegate Passes

- Exclusive sponsorship
- 2 delegate passes
- Branding included on 3 mobile charging stations
- Logo inclusion on conference website
- Logo inclusion on event signage

## SPORTS SIMULATOR SPONSOR

1 Available  
5 Complimentary Delegate Passes

- Exclusive sponsorship
- 2 delegate passes
- Branding displayed at the sports simulator
- Logo inclusion on conference website
- Logo inclusion on event signage

## DIGITAL SIGNAGE

1 Available  
2 Complimentary Delegate Passes

## CONTACT US

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+44 (0)20 7330 9516  
[delme.thompson@cfainstitute.org](mailto:delme.thompson@cfainstitute.org)



**CFA Institute**

## Diversity & Inclusion Conference (title TBD)



March 2024  
Boston, MA, USA

**SPONSORSHIP OPPORTUNITIES**

# EVENT OVERVIEW

Achieving 'diversity of thought' throughout your business is essential in a world seeking maximized returns. The way people invest is changing, with clients demanding greater social impact whilst still delivering optimized returns. But with so many external and internal factors to counter, how can business, DEI, and HR leaders build a sustainable path forward to extraordinary talent pipeline and impact?

We'll explore emerging and tested ideas, actionable insights and the very latest data and research on how, in a knowledge-based industry, leaders can harness and direct this momentum to unlock new dimensions of human performance, proving you can solve for both bottom line and good!



Join us for this pivotal event and let us help you navigate your future-proofing journey!

## CORE AUDIENCE

- C-Level Executives
- HR & Diversity Leadership
- L&D Leadership

## AGENDA THEMES

- Pipeline / Recruitment / Retention
- Leadership and influence
- Measurement

### CONTACT US

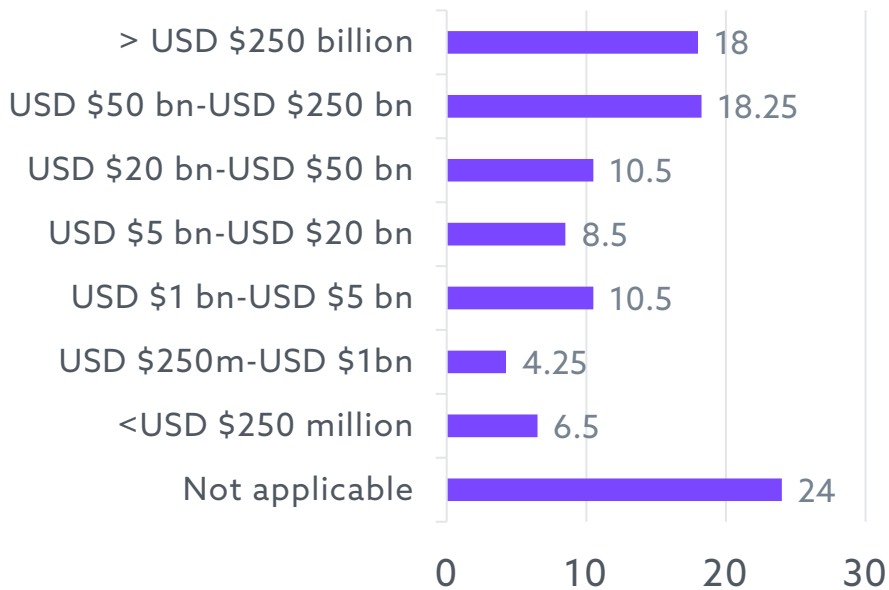
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# RECENT AUDIENCE DEMOGRAPHICS

Meet the ultimate delegate mash-up! A summary of attendees from similar events.

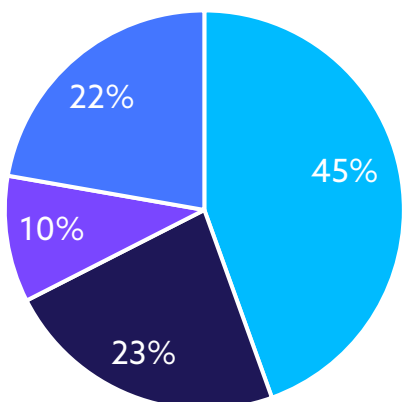
## EMPLOYER AUM (USD)



## TOP OCCUPATIONS

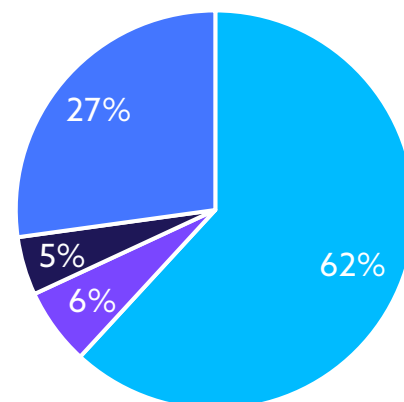
- 33% Portfolio Manager
- 12% Relationship Manager
- 10% Consultant
- 9% C-Suite
- 5% Manager of Managers

## PRIMARY ASSET BASE



- Institutional
- Private/Individual
- Both
- Not Applicable

## BUY/SELL SIDE



- Buy Side
- Sell Side



# PREMIUM SPONSORSHIPS

## PLATINUM SPONSORSHIP

6 Complimentary Delegate Passes

This premier sponsorship recognizes your firm as the leading supporter of the event and includes an extensive list of features that promotes your firm's brand along with your firm's products and services to our conference attendees.

## GOLD SPONSORSHIP

4 Complimentary Delegate Passes

This premier sponsorship recognizes your firm as an impactful supporter of the event and includes an extensive list of features that includes brand, lead gen, and thought leadership deliverables.

## SILVER SPONSORSHIP

3 Complimentary Delegate Passes

The Silver Sponsorship allows your firm to generate leads on-site, access key stakeholders and decision makers, and strengthen its brand reputation amongst our conference attendees.

## STANDARD EXHIBIT

2 Complimentary Delegate Passes

As an Exhibitor, your firm will receive a standard tabletop booth in our exhibit space. This provides your firm the opportunity to engage with key stakeholders and decision makers in-person.

SPONSORSHIP OPPORTUNITIES	Platinum Sponsorship	Gold Sponsorship	Silver Sponsorship	Standard Exhibit
<b>Quantity Available</b>	1	2	5	26
<b>Deliverables</b>				
<b>Exclusivity</b>				
Exclusive sponsorship	•			
<b>Conference Passes</b>				
Complimentary registrations	6	4	3	2
Opportunity to purchase additional passes at a discount	•	•	•	•
<b>Lead Generation</b>				
Opt-in attendee email list	2x Use	1x Use		
Opportunity to contact attendees through the mobile app	•	•	•	•
<b>Thought Leadership</b>				
Solo speaking opportunity	•			
Panel speaking opportunity	•	•		
<b>Branding, Promotion, &amp; Activation</b>				
Recognition in promotional emails	•	•		
Logo inclusion on conference website	•	•	•	•
Logo inclusion on event signage	•	•		
Tabletop exhibit booth space	2	1	2	1
Priority in booth selection process	•	•	•	
Audible Recognition by host or moderator	•	•		
30-second commercial to air between sessions	2	1		

# BRAND & AMENITY SPONSORSHIPS

## VIP LOUNGE & CAREER CENTER

1 Available  
4 Complimentary Delegate Passes

- Exclusive sponsorship
- 2 delegate passes
- Branding displayed at the VIP Lounge & Career Center
- Opportunity to send career coaches to advise attendees
- Branding at the headshot station in the VIP Lounge
- Logo inclusion on conference website
- Logo inclusion on event signage

## BADGE & REGISTRATION SPONSOR

1 Available  
2 Complimentary Delegate Passes

- Exclusive sponsorship
- 1x use of the opt-in attendee email list
- 2 delegate passes
- Branding displayed at the registration desk
- Logo included on all delegate badges
- Logo included on all lanyards
- Logo inclusion on conference website
- Logo inclusion on event signage

## MOBILE APP & WI-FI SPONSOR

1 Available  
2 Complimentary Delegate Pass

- Exclusive sponsorship
- 2 delegate passes
- Opportunity to customize WIFI SSID & password
- Custom Wi-Fi login splash page
- Wi-Fi login URL redirect
- Custom banner ad in the conference mobile app
- Logo inclusion on event signage

## EVENING SOCIAL FUNCTION SPONSOR

1 Available  
2 Complimentary Delegate Passes

- Exclusive sponsorship
- 2 delegate passes
- Exclusive brand recognition during the evening social gathering on day 1
- Logo inclusion on conference website
- Logo inclusion on event signage

## PRIVATE BREAKFAST SPONSOR

2 Available  
2 Complimentary Delegate Passes

- 2 delegate passes
- Opportunity to host a private breakfast at the venue
- Logo inclusion on conference website
- Logo inclusion on event signage

## SPECIALTY COFFEE STATION SPONSOR

1 Available  
2 Complimentary Delegate Passes

- Exclusive sponsorship
- 2 delegate passes
- Branded signage at the specialty coffee station
- Logo printed on coffee cup sleeves and beverage napkins
- Logo inclusion on conference website
- Logo inclusion on event signage

## MOBILE CHARGING STATION SPONSOR

1 Available  
2 Complimentary Delegate Pass

- Exclusive sponsorship
- 2 delegate passes
- Branding included on 3 mobile charging stations
- Logo inclusion on conference website
- Logo inclusion on event signage

## WELLNESS SPONSOR

1 Available  
2 Complimentary Delegate Passes

- Exclusive sponsorship
- 2 delegate passes
- Branding displayed at the wellness & massage center
- Logo inclusion on conference website
- Logo inclusion on event signage

## NETWORKING BREAK SPONSOR

4 Available  
2 Complimentary Delegate Passes

- 2 delegate passes
- Brand recognition during a networking break
- Logo inclusion on conference website
- Logo inclusion on event signage

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**CFA Institute**

## Artificial Intelligence Conference (title TBD)



Spring 2024

**SPONSORSHIP OPPORTUNITIES**

# EVENT OVERVIEW

New for 2024—CFA Institute will be launching a much-requested conference, exploring the potential of Web 3.0 and DeFi for the finance sector. Core areas we will cover include (subject to change):

- Artificial intelligence
- Machine learning
- 5G
- Cloud & big data
- FinTech
- Blockchain
- Internet of Things (IoT)
- Quantum computing
- Cyber security
- Privacy
- Web 3.0 (Metaverse)
- Tokenization of assets (NFTs, CBDCs)
- Industry 4.0



Join us for what is sure to be a smörgåsbord of business-critical insights, aimed at arming you and your business with a technology roadmap for ultimate competitive edge!

## CORE AUDIENCE

- Business leaders looking to refine their business strategy, alongside those driving tech innovation

## AGENDA THEMES

- Assessing the impact of Web 3.0 and DeFi, and how it will shape the finance sector

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# RECENT AUDIENCE DEMOGRAPHICS

A snapshot of audience engagement in our recent AI handbook launch and webinar series on AI, ML, and big data. Imagine the potential for a world class in-person conference!

# 3,984 Registrations

Our most recent webinar had **80% live viewers** and **1,146 marketing opt-ins**

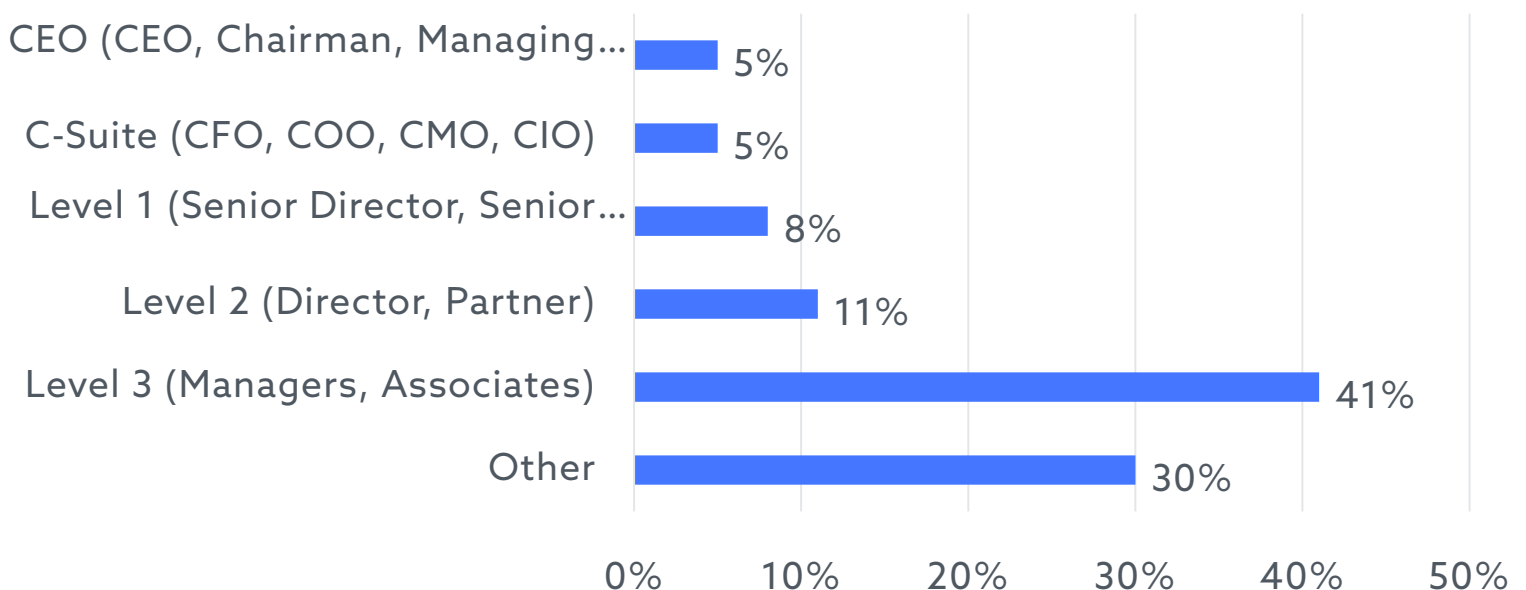
## TOP EMPLOYER TYPES

- 29% Asset Management/Investment Firm
- 7% Commercial Bank
- 7% Private Wealth Management Firm
- 7% Consulting Firm
- 3% Information Technology or Software

## TOP OCCUPATIONS

- 10% Research Analyst
- 8% Portfolio Manager
- 6% Consultant
- 5% Financial Adviser
- 5% Accountant

## JOB LEVEL



# PREMIUM SPONSORSHIPS

## PLATINUM SPONSORSHIP

6 Complimentary Delegate Passes

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## GOLD SPONSORSHIP

4 Complimentary Delegate Passes

This premier sponsorship recognizes your firm as an impactful supporter of the event and includes an extensive list of features that includes brand, lead gen, and thought leadership deliverables.

## SILVER SPONSORSHIP

3 Complimentary Delegate Passes

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## STANDARD EXHIBIT

2 Complimentary Delegate Passes

As an Exhibitor, your firm will receive a standard tabletop booth in our exhibit space. This provides your firm the opportunity to engage with key stakeholders and decision makers in-person.

SPONSORSHIP OPPORTUNITIES	Platinum Sponsorship	Gold Sponsorship	Silver Sponsorship	Standard Exhibit
<b>Quantity Available</b>	<b>1</b>	<b>2</b>	<b>5</b>	<b>10</b>
<b>Deliverables</b>				
<b>Exclusivity</b>				
Exclusive sponsorship	•			
<b>Conference Passes</b>				
Complimentary registrations	6	4	3	2
Opportunity to purchase additional passes at a discount	•	•	•	•
<b>Lead Generation</b>				
Opt-in attendee email list	2x Use	1x Use		
Opportunity to contact attendees through the mobile app	•	•	•	•
<b>Thought Leadership</b>				
Solo speaking opportunity	•			
Panel speaking opportunity	•	•		
<b>Branding, Promotion, &amp; Activation</b>				
Recognition in promotional emails	•	•		
Logo inclusion on conference website	•	•	•	•
Logo inclusion on event signage	•	•		
Tabletop exhibit booth space	2	1	2	1
Priority in booth selection process	•	•	•	
Audible recognition by host or moderator	•	•		
30-second commercial to air between sessions	2	1		

Please contact us to learn about additional venue-specific branding opportunities:

Jon Gentry ([jonathan.gentry@cfainstitute.org](mailto:jonathan.gentry@cfainstitute.org))



CFA Institute



Webinars

2023-2024 | CFA Institute

# SHOWCASE YOUR EXPERTISE

Drive innovation. Align with important conversations.

Sponsor our webinar series to engage with our global network of professionals and achieve your business objectives. In 2023 we hosted 100+ webinars with 40,000+ registrants covering topics such as AI, ESG, private markets, the CFA® Program, the SEC Marketing Rule, and more!

## Artificial Intelligence Series

### Series of 3 Webinars | Exclusive Sponsorship

With over 1,000 registrants for each episode in our first series of AI webinars, we are pleased to be launching Series 2 in September 2023. A single sponsor partner will have an opportunity to put forward an expert speaker in each episode to share key insights alongside a CFA Institute moderator and an invited additional guest.

## Candidate Conversations Series

### Series of 3 Webinars | Exclusive Sponsorship

Promoted to our global network of 180,000 candidates, this series of three 60 min interactive webinars will feature candidates from diverse backgrounds sharing their perspectives on life as a CFA Program candidate—how they balance study with work, family, and social commitments, and the motivations that kept them going.

These unique and extremely popular\* sessions offer the opportunity for sponsors—from study prep firms, training companies, or financial sector employers who support the CFA Program—to join the candidates on screen and share how their organization supports those wishing to pursue the CFA charter.

\*Season 1 received 1,600 registrations from current and prospective candidates, with an 84% opt-in rate for further information.

## Diversity, Equity, and Inclusion Series

### Series of 3 Webinars | Exclusive Sponsorship

Explore actionable insights, emerging ideas, and the latest data to unlock new dimensions of human performance, proving that you can solve for both bottom line and social impact. Secure this exclusive sponsorship to showcase your expertise.



# WEBINAR SERIES SPONSORSHIPS

All webinar series sponsorships include the following:

WEBINAR SERIES SPONSORSHIP DETAILS	
Webinars in each series	3
Deliverables	
Exclusivity	
Exclusive sponsorship	
Thought Leadership Positioning	
Opportunity for sponsoring firm to include a speaker on each webinar	
Collaboration between CFA Institute and sponsoring firm on content (includes curating speaker list)	
Brand Exposure	
Recognition in promotional emails	
Brand recognition on webinar artwork	
Lead Generation	
One-time use of the opt-in attendee email list	
Post-webinar performance summary	



Screenshot from a recent sponsored webinar



CFA Institute

# Podcasts

2023-2024 | CFA Institute

# PODCAST SPONSORSHIPS

CFA Institute podcasts provide a powerful platform to showcase your brand, share your expertise, and connect with a global audience of finance professionals, CFA® charterholders, and industry thought leaders.

CFA Institute podcasts have gained popularity for their insightful discussions, interviews, and analysis on a wide range of finance-related topics. By sponsoring CFA Institute podcasts, you can leverage the credibility and reach of this esteemed organization to amplify your brand's visibility and engage with an influential audience.

## SPONSORSHIP PROGRAM

### Guiding Assets

6 Month Term | Exclusive Sponsorship

Guiding Assets is the flagship podcast of CFA Institute and the definitive program for the investment management industry. Over 30,000 average monthly downloads of conversations with some of the most influential people from the world of finance about the topics that matter most to investment professionals.

### The Sustainability Story

6 Month Term | Exclusive Sponsorship

Named one of the top podcasts about corporate social responsibility, The Sustainability Story features intimate conversations with ESG investing and sustainability thought leaders. This niche podcast explores the fascinating intersection of finance, environment, governance, society, climate change, biodiversity, and more. Currently at 6,000 average monthly downloads and growing!

## All podcast sponsorships include the following:

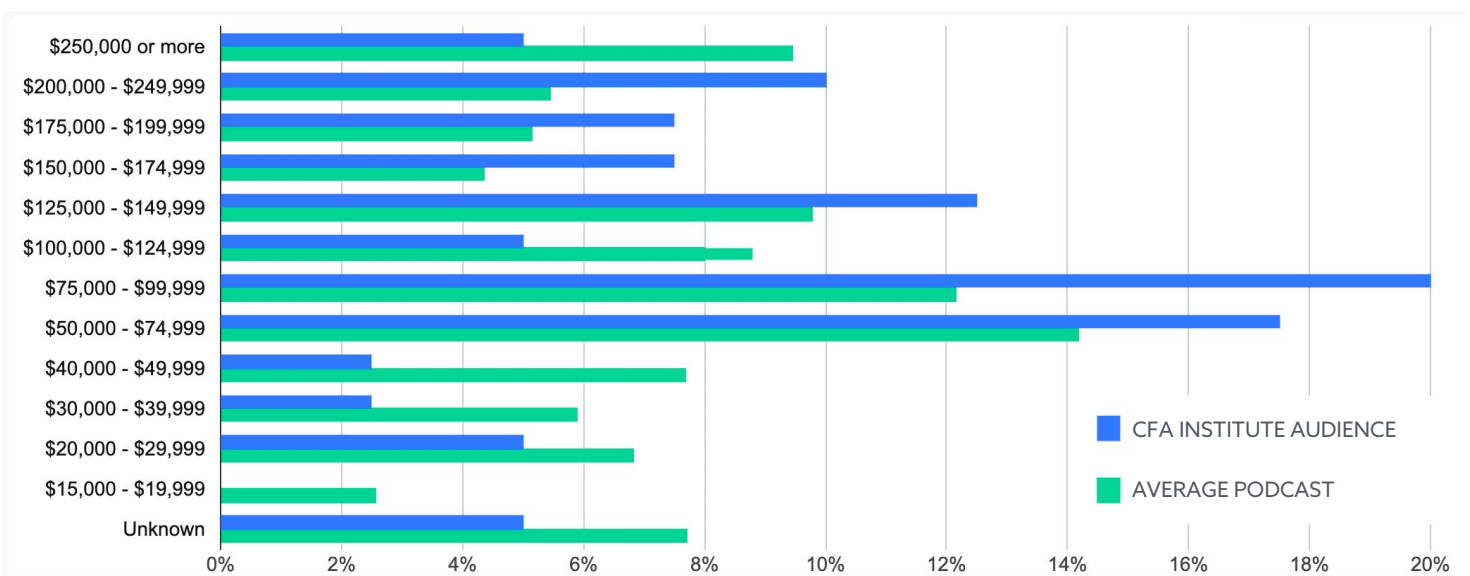
PODCAST SERIES SPONSORSHIP DETAILS	
Sponsorship Term	6 months
Deliverables	
Exclusivity	
Exclusive Sponsorship	
Thought Leadership Positioning	
Opportunity to invite a guest on 1 episode for each 6-month term	
Brand Exposure	
Branding on all podcast artwork (show and episode art that is used on podcast platforms and in podcast promotion)	
30-second audio advertisement at the start of each episode (includes entire back catalogue during the sponsorship term)	

# PODCAST LISTENER AUDIENCE STATISTICS

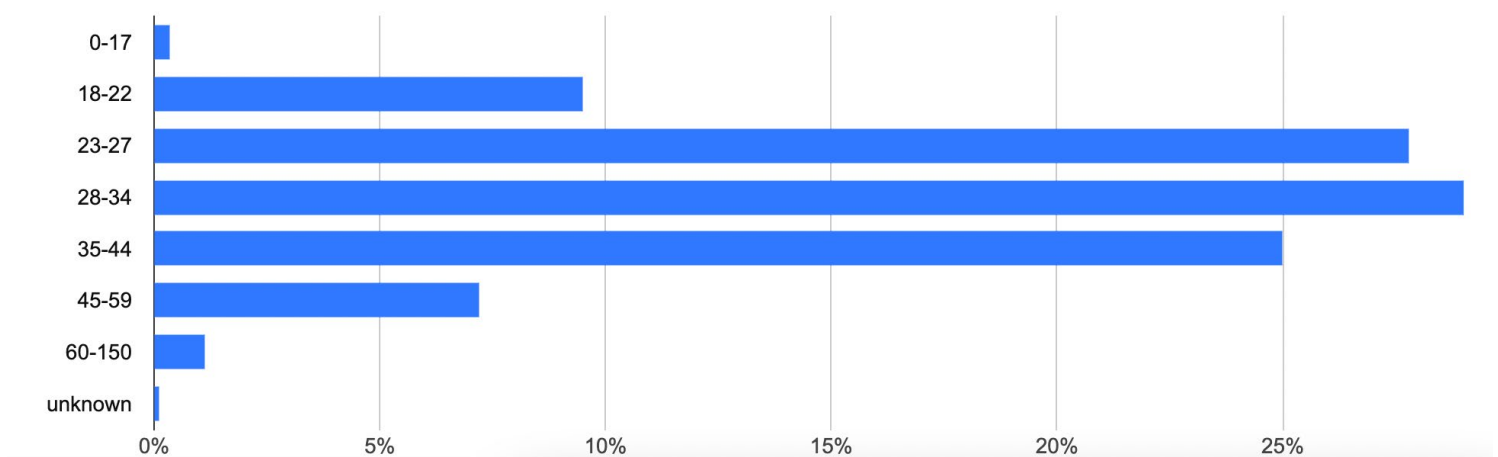
Statistics compiled from Apple Podcasts and Spotify publicly available user data

Guiding Assets was ranked #4 on FeedSpot's 2023 Best Institutional Investor Podcasts

## LISTENER HOUSEHOLD INCOME



## LISTENER AGE





**CFA Institute**

**Thank You!**

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