



## **Annual Endowment, Foundation, and Philanthropy Conference *Sponsorship Information***

On Thursday June 14, 2018 the CFA Society of Philadelphia (“CFAP”) will host its annual program focused on endowments, foundations, and philanthropy. This day-long conference will feature panel discussions and speakers from leading asset managers, non-profits, and subject matter experts in non-profit law and governance. The conference will address many of the pressing issues facing endowments, foundations and other philanthropic concerns.

This year’s topics include:

- The Financial Health of Philadelphia Area Non-Profits;
- The Search for Uncorrelated Returns;
- Investing in Women Owned Businesses;
- Impact of Tax Reform on Giving;
- The Pro’s and Con’s of the Outsourced CIO model.

*A full agenda with panelists and keynote speakers will be available shortly.*

The event will be held at Convene at Cira Centre (adjacent to Philadelphia’s 30th Street Station) from 8:00 AM to 4:00 PM. A cocktail reception will be held immediately following the conference. We expect approximately 175 professionals to attend the conference, representing over 80 firms. The audience is a mix of investment management professionals, non-profit executives, attorneys and other professionals who are passionate about mission-driven work.

**CFAP** is a founding society of the CFA Institute and was established in 1943 as a forum for the exchange of information for the investment community. CFAP has over 2,100 members with a reach that includes Pennsylvania, New Jersey, and Delaware. Visit us on the web at [www.cfaphil.org](http://www.cfaphil.org). Follow CFAP on LinkedIn, Twitter and Instagram.

Quality sponsorship has always been a key component to the success of our events. Through your participation, we are certain that your firm will share in this success. The sponsorship offerings are designed to enhance your firm’s exposure to this elite and targeted audience of non-profit experts and investment managers, while also increasing your name recognition within our region’s investment community. See the attached sponsor grid for a list of sponsor opportunities and their benefits for this event.

*Past sponsors of the Endowment, Foundation and Philanthropy Conference include Aberdeen Investment Management, Commonfund, Vanguard, Wilmington Trust, Parametric, Schroders, BlackRock and Fidelity Investments.*

**CFA Society of Philadelphia Endowment, Foundation, and Philanthropy Conference**  
**June 14, 2018**  
**Sponsorship Opportunities**

<b>Level (Availability)</b>	<b>Investment</b>	<b>Benefits</b>
<b>GOLD</b>  <b>(2 OF 3 AVAILABLE)</b>  <b>Vanguard</b>	\$5,000	<ul style="list-style-type: none"> <li>• Exhibit table (opportunity to set up exhibit table in conference reception area);</li> <li>• Conference day signage (company name/logo displayed in reception area and conference sessions);</li> <li>• Recognition during opening remarks;</li> <li>• Full page advertisement on rear cover (front or back) of conference program;</li> <li>• Three complimentary conference registrations;</li> <li>• Recognition as a sponsor on conference promotional materials;</li> <li>• Mailing list of registered attendees.</li> </ul>
<b>SILVER</b>  <b>(3 OF 4 AVAILABLE)</b>  <b>Schroders</b>	\$2,500	<ul style="list-style-type: none"> <li>• Conference day signage (company name/logo displayed in reception area and conference sessions);</li> <li>• Recognition during opening remarks;</li> <li>• Full page advertisement in conference program book;</li> <li>• One complimentary conference registration;</li> <li>• Recognition as a sponsor on conference promotional materials.</li> </ul>
<b>BRONZE</b> <b>(4 AVAILABLE)</b>	\$1,500	<ul style="list-style-type: none"> <li>• 1/2 page advertisement in program book;</li> <li>• Recognition during opening remarks;</li> <li>• Recognition as a sponsor on conference promotional materials.</li> </ul>
<b>NETWORKING RECEPTION</b>	\$3,000	<ul style="list-style-type: none"> <li>• Includes signage, a display table and opportunity to address attendees at the beginning of the reception;</li> <li>• Silver Sponsor benefits.</li> </ul>

**Contact:**

Pete Conners  
Executive Director, CFA Society of Philadelphia  
Phone: (215) 320-4980  
E-mail: [pconners@cfaphil.org](mailto:pconners@cfaphil.org)

*\*\*\* Sponsorship can be payable by check or credit card. Customized sponsorships are also available.*