



Private Wealth Management Conference

December 2, 2021 | Convene City View, Philadelphia, PA | 8:30 a.m. – 5:00 p.m.

SPONSORSHIP INFORMATION

On December 2, 2021 CFA Society Philadelphia (“CFAP”) will host its program focused on private wealth and high net worth investors. This day-long conference will feature panel discussions and expert speakers from leading wealth advisors, trust and estate experts, and asset managers. The conference addresses many of the pressing issues facing wealth investors.

A focus of this year’s conference will be on registered investment advisors (RIA’s). We envision sessions on both the business side (RIA mergers and sales; bringing along a new generation of leaders; issues with technology; changing business models) and the advice side (advisor alpha; what do you do when planning is a greater percentage of the value proposition while investing is a smaller one; updates on trust and estate law).

The event will be held at Convene at City View from 8:30 AM to 5:00 PM. A cocktail reception will be held immediately following the conference. We expect approximately 175 investment professionals to attend, representing over 100 firms. The format of the event will be hybrid. We plan to webcast the event and to make it available to CFA societies globally.

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 2,350 members with a reach that includes eastern Pennsylvania, Southern New Jersey and Delaware. Visit us on the web at www.cfaphil.org.

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 wealthy investors, advisors, consultants and family offices, while also increasing your name recognition within our region’s investment community.

Past sponsors of CFAP include Invesco, Aberdeen Asset Management, Vanguard, Capital Group, Parametric Partners, Options Industry Council, Wilmington Trust, Deutsche Bank, BlackRock, Wells Fargo Asset Management and many more!

SPONSORSHIP OPPORTUNITIES

LEVEL	INVESTMENT	BENEFITS
GOLD One of Two SOLD! Hines Securities	\$10,000	<ul style="list-style-type: none"> Exhibit table (opportunity to set up exhibit table in conference reception area) Conference day signage Recognition during opening remarks Full page advertisement on conference program book Three complimentary passes for associates and/or guests to attend the conference Recognition as a sponsor on conference promotional materials Mailing list of registered attendees
SILVER (Four)	\$7,500	<ul style="list-style-type: none"> Conference day signage Recognition during opening remarks Half-page advertisement in conference program One complimentary pass for an associate or guest to attend the conference Recognition as a sponsor on conference promotional materials
BRONZE Two of Five SOLD Gregory FCA Northern Trust	\$5,000	<ul style="list-style-type: none"> Conference day signage (company name/logo displayed in Recognition as a sponsor on conference promotional materials Recognition during opening remarks
LUNCHEON SPONSORSHIP SOLD! Capital Group	\$3,000	Includes signage, a display table and opportunity to address attendees at the beginning of the reception

CONTACT: **PETE CONNERS**

*** Sponsorship payable by check or credit card.

Executive Director, CFA Society Philadelphia

E-mail: pconners@cfaphil.org Phone: (215) 320-4980

