



Private Wealth Management Conference

December 8, 2022 | Convene City View, Philadelphia, PA | 8:30 a.m. – 5:00 p.m.

SPONSORSHIP INFORMATION

On December 8, 2022 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 investment advisors.

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.

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 2,500 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 Fidelity, Invesco, Aberdeen Asset Management, Vanguard, Capital Group, Parametric Partners, Options Industry Council, Wilmington Trust, Deutsche Bank, BlackRock, Wells Fargo Asset Management and many more!

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SPONSORSHIP OPPORTUNITIES

| LEVEL | INVESTMENT | BENEFITS |
|--|------------|--|
| GOLD (Two) | \$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 (Five) | \$5,000 | <ul style="list-style-type: none"> • Conference day signage (company name/logo displayed in) • Recognition as a sponsor on promotional materials • Recognition during opening remarks |
| LUNCHEON SPONSORSHIP (One) | \$3,000 | Includes signage, a display table and opportunity to address attendees at the beginning of the luncheon |
| COCKTAIL RECEPTION SPONSORSHIP (One) | \$3,000 | Includes signage, a display table and opportunity to address attendees at the beginning of the reception |
| EVENT APP SPONSORSHIP | \$2,500 | Includes signage and a display table |