



**New  
America  
Alliance**

# **NEW AMERICA ALLIANCE CHICAGO ROADSHOW**

**ALLOCATORS  
CONNECTION SUMMIT**

**OCTOBER 29, 2024**



**WILLIS TOWER  
CHICAGO, ILLINOIS**

**SPONSORSHIP OPPORTUNITIES**

**[WWW.NAAONLINE.ORG](http://WWW.NAAONLINE.ORG)**

# ORGANIZATIONAL SUMMARY

The New America Alliance is a national not-for-profit industry association dedicated to empowering women and diverse professionals and firms in the asset management investment industry, with a particular focus on the Hispanic, Latino, and Latina communities.

Our guiding core principles:

- **Capital Access & Excellence:** We promote Hispanic and Latino-owned firms, seeking equitable access to capital. We are committed to exposing institutional investors to the excellent capabilities of small and diverse managers and ensuring that these high-performing fund managers are recognized.
- **Education and Industry Engagement:** With our comprehensive educational programs and industry-wide events, we remain committed to our members' growth and success and to increasing participation, representation, and promotion of diverse professionals. We aim to build a community in which innovation, opportunity, and the diverse talents of Hispanics are embraced and celebrated. Through targeted networking, education, internships, mentorship, and sponsorships, we strive to break down the barriers that prevent our members from achieving success in the marketplace. As an organization, we are a catalyst for positive change. We foster an environment of inclusion that leverages the collective experience and wisdom of our dynamic community, promoting the prosperity of both our community and our industry.

Our vision is to shape a more diverse and inclusive future in the asset management investment industry, where the expertise and contributions of Hispanic, Latino, and Latina professionals and firms are not just recognized but are actively sought after to transform the industry. We aim to solidify our role as the leading advocate for these diverse professionals and firms, establishing new benchmarks in the industry. We are committed to fostering a landscape where our members achieve prominent recognition and substantial growth, with a strategic goal of tripling Hispanic, Latino, and Latina representation in the sector. This reflects our dedication to inclusivity and our promise of delivering tangible and measurable impact.



## What to Expect

The New America Alliance is excited to host the Chicago Roadshow at the iconic Willis Tower on October 29th. This event will feature panels and interactive discussions covering all asset classes, including:

- Fixed Income
- Private Credit
- Public Equities
- Private Equity
- Real Estate
- Infrastructure

We will welcome CIOs from across the Midwest to share their unique perspectives on navigating today's complex markets and positioning their portfolios for future success.

We are also honored to welcome a distinguished keynote speaker, Michelle DiGruttolo, MBA, MA. Michelle's experience as a former Daily Intelligence Briefer to President Obama underscores her credibility as a seasoned advisor and expert strategist. A decision-shaping influencer, Michelle has analyzed, packaged, and presented critical information to executive leaders in the White House, the Cabinet, Congress, and the Pentagon. She is a dynamic and influential speaker, known for her high-energy keynotes that combine keen geopolitical knowledge with the ability to decode current events. Her presentations take audiences beyond the headlines, helping them understand complex issues and uncover hidden trends, patterns, and relationships.

Participants will have numerous opportunities to engage with a wide network of entities, including Fund Managers, Insurance Companies, Pension Funds, Fund-of-Funds, Consultants, Endowments, Foundations, Sovereign Wealth Funds, and High-Net-Worth Individuals from across the Midwest. One such opportunity is the speed networking event, designed to facilitate direct interactions between managers and allocators. This format moves beyond passive participation, providing a prime opportunity to make lasting impressions and build enduring relationships.

The event will conclude with an extraordinary experience, allowing participants to savor unique spirits crafted and cherished by Chicago's heart and soul.

**As a sponsor, you will have the opportunity to support and be prominently featured during this convocation of leaders within the asset management industry. Your sponsorship will provide exceptional visibility and engagement with key decision-makers, enhancing your brand's presence and influence in this prestigious gathering.**

**[WWW.NAAONLINE.ORG](http://WWW.NAAONLINE.ORG)**

Interested in sponsorship? Contact: Marisol Reyes, [reyesm@naaonline.org](mailto:reyesm@naaonline.org)





# VALUE OF SPONSORSHIP

As a sponsor of this convocation of asset managers from across the Americas, you can accomplish number goals for your organization and position your firm and team as a leader within the industry.

## EXPOSURE TO EMERGING & DIVERSE MANAGERS

Meet and interact with emerging and diverse managers who are pursuing unique investment strategies across private and public markets. By interacting with these managers, you may discover new investment opportunities and build relationship with potential partners that you can methodically evaluate as part of your own investment process.

## EMPLOYEE ENGAGEMENT & PROFESSIONAL DEVELOPMENT

Sponsoring the MXC Symposium will help your firm and participating team members engage and develop meaningful relationships with asset management decision-makers from across the Western Hemisphere. You will have an opportunity to build your network and interact with decision-makers in a curated setting to develop meaningful connections.

## ACCESS TO HUMAN CAPITAL

The MXC Symposium is focused on enhancing the knowledge of asset management practitioners providing your team with a unique perspective to better capitalize on a changing investment landscape. The NAA is deliberately gathering market participants and decision makers from across the investment ecosystem providing you an opportunity to interact with executives from across asset classes.

## ACCESS TO GROWING LATINO MARKETS

Expand your reach into the growing U.S. Latino markets in an intentional manner. The Latino community in the U.S. represents a growing market that is projected to reach over \$2.6 trillion in buying power by 2025. By aligning your brand with a Latino organization, you can increase your visibility in this community and tap into asset managers with a unique perspective and the ability to capitalize on such demographic trends.

## ENHANCED BRAND IMAGE

Establish your brand as a leading participant in the asset management industry. This will help position your organization as a leader in the industry across the region providing increased positive publicity and exposure.

[WWW.NAAONLINE.ORG](http://WWW.NAAONLINE.ORG)

Interested in sponsorship? Contact: Marisol Reyes, [reyesm@naaonline.org](mailto:reyesm@naaonline.org)

# SPONSORSHIP OPPORTUNITIES

## Sponsorship levels range from \$4,500 - \$20,000

The NAA will also tailor partnership opportunities to specific firms as appropriate based on the options below.

		PLATINUM	GOLD	SILVER
		\$20,000	\$9,500	\$4,500
ATENDEE & NETWORKING	<b>CONFERENCE REGISTRATIONS</b> <i>Complementary registration for the one-day conference</i>	7	5	2
	<b>ADVANCE ATTENDEE LIST</b> <i>Access to the full conference attendee list</i>	2 weeks	1 week	3 days
SPEAKING OPPORTUNITIES	<b>PANEL PARTICIPATION</b> <i>Sponsor to sit on a panel during the conference, based on availability</i>	X		
	<b>RECEPTION KEYNOTE SPEAKER</b> <i>Sponsor to keynote during the networking reception, roughly 10 minutes</i>	X		
	<b>KEYNOTE INTRODUCTION</b> <i>Sponsor can introduce keynote</i>	X		
	<b>ELEVATOR PITCH JUDGE</b> <i>Sponsor to judge elevator pitch competition October 29</i>	X	X	
BRANDING	<b>UNIVERSAL BRANDING</b> <i>Logo inclusion on all event communication, signage, etc.</i>	X	X	X
	<b>PROGRAM GUIDE PLACEMENT</b> <i>Logo inclusion in program guide as listed sponsor</i>	X	X	X
	<b>SOCIAL MEDIA POST</b> <i>Social media thank you post with logo</i>	X	X	
	<b>LOGO ON THE NAME TAG</b> <i>Logo featured on name tag</i>	X		

# SPONSORSHIP OPPORTUNITIES

## Additional Sponsorship Opportunity

The option below may be an add-on to any main sponsorship levels or can be chosen as a stand alone

		Networking Lounge
		\$13,000
ATTENDEE & NETWORKING	<b>CONFERENCE REGISTRATIONS</b> <i>Complementary registration for the one-day conference</i>	5
	<b>ADVANCE ATTENDEE LIST</b> <i>Access to the full conference attendee list</i>	1 week
	<b>DESIGNATED LOUNGE SPACE</b> <i>Space where attendees will enjoy snacks &amp; refreshments throughout the entire duration of the conference</i>	X
SPEAKING OPPORTUNITIES	<b>PANEL PARTICIPATION</b> <i>Sponsor to sit on a panel during the conference, based on availability</i>	X
BRANDING	<b>UNIVERSAL BRANDING</b> <i>Logo inclusion on all event communication, signage, etc.</i>	X
	<b>PROGRAM GUIDE PLACEMENT</b> <i>Logo inclusion in program guide as listed sponsor</i>	X
	<b>SOCIAL MEDIA POST</b> <i>Social media thank you post with logo</i>	X
	<b>SWAG AND SIGNAGE</b> <i>Option to provide swag in the Networking Lounge</i>	X



# PREVIOUS SPONSORS

The selection of sponsors contained on this page is provided on an "as is" basis with no guarantees of completeness, accuracy, or timeliness of the results obtained.

					
					
					
					
					
					
					
					
					

## PREVIOUS EVENTS

### CONFERENCES

- Insights for Capital Allocators, Investment Managers, and Entrepreneurs
- Venture Capital and Private Equity Symposium
- NAA Dealmakers Virtual Forum: Investment Consultants Diversity Trends
- Dealmakers Forum: Women Leading Innovation, Value Creation and Impact
- Dealmakers Forum: Seeding and Anchoring the Next Generation of Managers

### RECENT VIRTUAL CIO ASSET CLASS CONNECTIONS

- CalPERS
- CalSTRS
- LACERA
- Callan
- LAFPP

## PREVIOUS ATTENDEES

### PUBLIC PENSION FUNDS

- Teacher Retirement System of Texas (TRS)
- Employees Retirement System of Texas (ERS)
- New York State Common Retirement Fund (NYSCRF)
- Pennsylvania Public School Employees' Retirement System
- State Universities Retirement System of Illinois
- Teachers' Retirement System of the State of Illinois
- Texas Permanent School Fund
- UAW Retiree Medical Benefits Trust
- Pennsylvania Municipal Retirement System
- Los Angeles County Employees Retirement Association (LACERA)
- Office of the New York City Comptroller

### CORPORATE PENSIONS

- Advocate Aurora Health
- Pacific Current Group
- Raytheon Technologies

### OTHER INSTITUTIONAL INVESTORS

- Outset Global
- Wafra Inc.
- Tiedemann Advisors

### ENDOWMENTS AND FOUNDATIONS

- The David and Lucile Packard Foundation
- W.K. Kellogg Foundation
- University of Richmond
- Saint Paul & Minnesota Foundation

### FAMILY OFFICES

- Cooper Family Office
- Coomber Family Estates
- Dragon Trust Family Office
- CrossGrain Family Investments
- SEN Family Office

### INVESTMENT FIRMS AND CONSULTANTS

- Accelerate Investors
- Aksia
- Albourne
- Astarte Capital Partners
- Attucks Asset Management
- Azimut Alternative Capital Partners
- RockCreek - Private Markets
- RockCreek - Public Markets
- Stable Asset Management
- Verus
- Wilshire





# **New America Alliance**

**NAAONLINE.ORG**