



CFA Institute



CFA Society
Philippines

SECURE YOUR FUTURE NOW,

LEARN FROM THE TRUSTED EXPERTS

WHO MANAGE YOUR MONEY

PHILIPPINE RETAIL INVESTMENT CONFERENCE 2015

MAY 16, 2015 | 8:00 A.M. – 5:30 P.M.
SMX TAGUIG CONVENTION CENTER

EARLY BIRD RATE: PHP1,900.00 (UNTIL APR. 25 ONLY)

REGULAR RATE: PHP2,500.00 (UNTIL MAY 11 ONLY)





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PLATINUM SPONSORSHIP

PHP200,000.00

PRE-CONFERENCE

- Company logo inclusion as PLATINUM SPONSOR in social media marketing and promotion
- Company logo inclusion as PLATINUM SPONSOR in the event website
- Corporate video to be posted in the event website
- Company name mention in print ads & media releases before the conference

CONFERENCE TICKETS

- 5 VIP reserved seats for company's high ranking officials and/or high value clients.
- 100 complimentary regular seats for company's clients, employees, and/or representatives

CONFERENCE DAY

- Set-up booth at the prime location with one table and two chairs on the day of the conference
- Display up to 4 roll-up banner standees (maximum size of 6.25 ft.x 2.75)
- Distribute marketing collaterals to the attendees. Sponsor has an option to include collaterals in the conference souvenir kits provided that the collaterals be delivered to organizer two weeks before the conference day.
- Product sampling of company's products
- Conduct a 30-minute presentation on a topic subject by approval of the organizer.
- Company logo inclusion as PLATINUM SPONSOR in rolling PowerPoint slides to be presented before the start and during break time of the conference.
- Live acknowledgement of your company as a PLATINUM SPONSOR by the host
- Play corporate video before the start of the program and during lunch break
- Chance to raffle off 5 items for the conference raffle draw where company logo will be projected on screen and host will recognize raffle sponsor

POST-CONFERENCE

- Registration list with contact details
- Company name mention as conference supporter in post-event media releases

LOCK-OUT

- Opportunity to secure lock-out for this sponsorship category for additional fee of Php50,000.00



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GOLD SPONSORSHIP

PHP150,000.00

PRE-CONFERENCE

- **Company logo inclusion** as GOLD SPONSOR in social media marketing and promotion
 - **Company logo inclusion** as GOLD SPONSOR in the event website
 - **Corporate video** to be posted in the event website
 - **Company name mention** in print ads & media releases before the conference
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CONFERENCE TICKETS

- **3 VIP reserved seats** for company's high ranking officials and/or high value clients.
 - **50 complimentary regular seats** for company's clients, employees, and/or representatives
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CONFERENCE DAY

- **Set-up booth** with one table and two chairs on the day of the conference
 - Display up to **2 roll-up banner standees** (maximum size of 6.25 ft. x 2.75)
 - **Distribute marketing collaterals** to the attendees. Sponsor has an option to include collaterals in the conference souvenir kits provided that the collaterals be delivered to organizer two weeks before the conference day.
 - **Product sampling** of company's products
 - **Company logo inclusion** as GOLD SPONSOR in rolling PowerPoint slides to be presented before the start and during break time of the conference.
 - **Live acknowledgement** of your company as a GOLD SPONSOR by the host
 - **Chance to raffle off 5 items** for the conference raffle draw where company logo will be projected on screen and host will recognize raffle sponsor
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POST-CONFERENCE

- **Registration list** with contact details
- **Company name mention** as conference supporter in post-event media releases



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SILVER SPONSORSHIP

PHP100,000.00

PRE-CONFERENCE

- Company logo inclusion as SILVER SPONSOR in social media marketing and promotion
- Company logo inclusion as SILVER SPONSOR in the event website
- Corporate video to be posted in the event website
- Company name mention in print ads & media releases before the conference

CONFERENCE TICKETS

- 2 VIP reserved seats for company's high ranking officials and/or high value clients.
- 25 complimentary regular seats for company's clients, employees, and/or representatives

CONFERENCE DAY

- Set-up booth with one table and two chairs on the day of the conference
- Display up to 1 roll-up banner standee (maximum size of 6.25 ft. x 2.75)
- Distribute marketing collaterals to the attendees. Sponsor has an option to include collaterals in the conference souvenir kits provided that the collaterals be delivered to organizer two weeks before the conference day.
- Product sampling of company's products
- Company logo inclusion as SILVER SPONSOR in rolling PowerPoint slides to be presented before the start and during break time of the conference.
- Live acknowledgement of your company as a SILVER SPONSOR by the host
- Chance to raffle off 5 items for the conference raffle draw where company logo will be projected on screen and host will recognize raffle sponsor

POST-CONFERENCE

- Registration list with contact details
- Company name mention as conference supporter in post-event media releases



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BRONZE SPONSORSHIP

PHP50,000.00

PRE-CONFERENCE

- Company logo inclusion as BRONZE SPONSOR in social media marketing and promotion
 - Company logo inclusion as BRONZE SPONSOR in the event website
 - Corporate video to be posted in the event website
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CONFERENCE TICKETS

- 10 complimentary regular seats for company's clients, employees, and/or representatives
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CONFERENCE DAY

- Display up to 1 roll-up banner standee (maximum size of 6.25 ft. x 2.75)
 - Distribute marketing collaterals to the attendees. Sponsor has an option to include collaterals in the conference souvenir kits provided that the collaterals be delivered to organizer two weeks before the conference day.
 - Product sampling of company's products
 - Company logo inclusion as BRONZE SPONSOR in rolling PowerPoint slides to be presented before the start and during break time of the conference.
 - Live acknowledgement of your company as a BRONZE SPONSOR by the host
 - Chance to raffle off 5 items for the conference raffle draw where company logo will be projected on screen and host will recognize raffle sponsor
-

POST-CONFERENCE

- Registration list with contact details

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CONFERENCE PROGRAM

SECURE YOUR FUTURE NOW, LEARN FROM THE TRUSTED EXPERTS WHO MANAGE YOUR MONEY

8:00AM	Conference Registration
9:00AM	Welcome Speech
9:10AM	Keynote Address
9:30AM	Retirement Essentials <i>Q&A Retirement Essentials</i>
10:15AM	Morning Break (15 mins.)
10:30AM	Creating a Personalized Investment Policy Statement <i>Q&A Creating a Personalized Investment Policy Statement</i>
11:25AM	Frauds, Scams and Consumer Protection <i>Q&A Frauds, Scams and Consumer Protection</i>
12:10PM	Lunch Break (1 hr. and 30 mins.)
1:40PM	12 Common Mistakes Investors Make <i>Q&A 12 Common Mistakes Investors Make</i>
2:25PM	Panel: Risk and Return Outlook of Stocks, Bonds, Properties and Private Equity <i>Q&A Panel: Risk and Return Outlook of Stocks, Bonds, Properties and Private Equity</i>
3:25PM	Afternoon Break (15 mins.)
3:40PM	How to Analyze Mutual Funds <i>Q&A How to Analyze Mutual Funds</i>
4:25PM	Preserving Family Wealth Through Generations <i>Q&A Preserving Family Wealth Through Generations</i>
5:15PM	Closing
5:30PM	End

**Conference Program is subject to change without prior notice.*



PHILIPPINE RETAIL INVESTMENT CONFERENCE 2015 SPONSORSHIP AGREEMENT FORM

PLEASE PRINT OR TYPE

COMPANY

- Name : _____
- Complete Billing Address : _____
- Contact No. : _____
- Fax No. : _____

CONTACT PERSON

- Name : _____
- Position : _____
- Email Address : _____
- Contact No. : _____

SPONSORSHIP PACKAGE

- Platinum** Php200,000.00
- Gold** Php150,000.00
- Silver** Php100,000.00
- Bronze** Php50,000.00

TERMS OF PAYMENT

- The Philippine Retail Investment Conference 2015 Sponsorship shall be paid by:

- Cash
- Check
- Bank Deposit

Account Name : Chartered Financial Analyst Society of the Philippines, Inc.
 Account Number : 286-009-3229
 Bank : BDO Strata 100

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Approved by:

(Signature over printed name)

(Designation)