



THE INVESTMENT
FUNDS INSTITUTE
OF CANADA

L'INSTITUT DES FONDS
D'INVESTISSEMENT
DU CANADA

SPONSORSHIP PACKAGE 2018

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FROM THE PRESIDENT & CEO



It is my pleasure to invite you to join The Investment Funds Institute of Canada's exciting slate of events in 2018. We hope that you will be able to celebrate our 56th year with us as we host a full agenda of topical workshops and seminars along with our three annual signature events highlighted in this sponsorship package.

On September 27, 2018, IFIC will bring you more value than ever before with our Annual Leadership Conference, Canada's pre-eminent event for the investment funds industry. The Leadership conference forges engagement between industry and policy makers and, in 2018, we will again feature an outstanding line up of expert guest speakers and timely discussion panels. The sessions will draw together the industry's most senior leaders and representatives as they explore the way forward for the funds industry and investors.

On July 11, IFIC will host our 27th Annual Golf Classic, a summer gathering that has become the signature networking event of the funds industry in Canada. Our final scheduled event of the year, IFIC Operations Day on November 15 is one of our most popular annual events. Operations Day is designed to add value to your business and drive results by delivering practical programs to help your organization respond to evolving regulatory and investor demands.

In addition to our scheduled line-up, IFIC hosts special events and sessions throughout the year designed to keep members fully informed on the most topical issues, research, and regulatory proposals affecting the industry.

IFIC is proud to be the authoritative voice of Canada's investment funds industry, including fund managers, distributors and industry service organizations. This year's slate of events promises all of our members valued opportunities to meet, learn, share ideas, and to work together in support of our industry and the investors we serve.

Yours truly,

A handwritten signature in black ink that reads "Paul C. Bourque". The signature is written in a cursive style and is underlined with a single horizontal line.

Paul C. Bourque, Q.C.
President and CEO
The Investment Funds Institute of Canada

SPONSORSHIP OPPORTUNITIES

IFIC's reputation as a leading voice in the Canadian investment funds industry has earned the trust of financial executives, decision makers, and policymakers.

Our events bring together participants from across the industry and are designed to address their strategic interests. We offer a productive environment for our members to brainstorm solutions to central industry issues, and foster new tactics to support a competitive Canadian industry, all while increasing investor confidence.

Sponsor partnerships present new and exciting opportunities for your organization to – **elevate your strategic positioning**, **foster new relationships**, and **increase your exposure** within the industry.

Today you can start investing in the future of your organization's reputation by **becoming an IFIC sponsor**.

By partnering at an IFIC event, you will gain exclusive access to our high-profile audience made up of top-tier industry professionals, and be able to leverage these new connections to raise your company's profile.

HOW CAN YOU GET INVOLVED?

From breakfast seminars, to the annual leadership conference, to our annual golf classic, as an IFIC sponsor you showcase your organization's commitment and leadership in support of a vibrant investment funds industry.

Benefits of Sponsorship:

- **Raise your public profile** by gaining exclusive access to top executives and policymakers in the investment funds industry
- **Build your professional network** within the financial community
- **Promote your own products, services, and solutions** to industry partners in the investment funds industry
- **Maximize your exposure** with more effective reach and frequency
- **Stay abreast of the latest trends and innovations** in the investment funds industry

IFIC Affiliates – Unlock Cost-Saving Deals!

Receive a \$3,000 discount on your IFIC membership fee when you sponsor one or more IFIC events totaling \$5,000 in a calendar year.

Your sponsorship dollars make it possible for IFIC to:

- Provide effective leadership as the investment funds industry's most authoritative voice
- Continue providing our members with high caliber events that keep you up to date on trends in the investment funds industry
- Provide members with a forum to foster long lasting networking connections, share ideas, and experiences to promote mutual business success

Are you still looking for ways to unlock high-level brand exposure in the financial sector, at a minimal cost? Then look no further. Set yourself apart from the competition – become an IFIC sponsor.

To find out more, email **Melissa Wood – Manager, Marketing and Member Communications** at mwood@ific.ca

BREAKFAST & LUNCH SEMINAR SPONSORSHIPS

During the course of the year, IFIC hosts a number of breakfast and lunch seminars that help the industry stay informed on key business and policy issues. Events in 2017 included two member-only sessions on the CSA's consultation on discontinuing embedded commissions. We expect to host several similar topical events in 2018, including member-only sessions on regulatory initiatives and new research.

Becoming an exclusive sponsor of these special events is a great way to showcase your company's strength, commitment and corporate identity. Sponsorships will be offered as events become scheduled and booked on a first come/first served basis, starting with firms that have indicated a prior interest. If you would like to be included in the priority email distribution list, please contact Melissa Wood at mwood@ific.ca.

Breakfast Seminar

\$3,500

- 1 available per event
- single sponsor exclusivity
- MC acknowledgement during opening remarks
- logo placement on all IFIC event marketing materials, printed and electronic
- opportunity to distribute marketing materials or promotional items to delegates
- complimentary event passes: 2

Lunch Seminar

\$5,500

- 1 available per event
- single sponsor exclusivity
- MC acknowledgement during opening remarks
- logo placement on all IFIC event marketing materials, printed and electronic
- opportunity to distribute marketing materials or promotional items to delegates
- complimentary event passes: 4

IFIC 27TH ANNUAL GOLF CLASSIC

**Wednesday July 11, 2018
Rattlesnake Point, Milton**

The 27th IFIC Annual Golf Classic is a great opportunity to build industry ties with clients, colleagues and friends as you enjoy a full day of golf, networking and a post-tournament cocktail reception. This popular event also features fun contests, premium prizes and giveaways. This year's event is located at Rattlesnake Point.

(Levels cannot be co-sponsored.)

PLATINUM SPONSOR (1 AVAILABLE)

\$15,000

- primary logo placement on official welcome banner
- tee block recognition
- opportunity for corporate commercial (max 30 sec)
- exclusive logo recognition on pin flags at each hole (double course)
- primary logo placement on custom golf cart name cards
- primary logo placement on custom score cards
- primary logo placement on all IFIC event marketing materials, printed and electronic
- full page ad in event program
- complimentary passes: three foursomes (12 individuals)
- four 9 ft flying banners (two on each course in high traffic areas)
- acknowledgement during morning remarks and award ceremony
- exclusive post event survey sponsor
- opportunity to promote company at awards ceremony with gift card prize giveaway (minimum value \$100)
- single sponsor exclusivity

DIAMOND – WELCOME GIFT SPONSOR (1 AVAILABLE)

\$12,000

- attendees will receive a souvenir gift with your company logo (*gift will be provided by IFIC and will be branded with the sponsor and IFIC logos*)
- secondary logo placement on official welcome banner
- prominent logo placement on custom golf cart name cards
- prominent logo placement on custom score cards
- secondary logo placement on all IFIC event marketing materials, printed and electronic
- half page ad in event program
- complimentary passes: two foursomes (8 individuals)
- two 9 ft flying banners (one on each course in high traffic areas)
- acknowledgement during morning remarks and award ceremony
- single sponsor exclusivity

GOLD SPONSOR (1 AVAILABLE - 1 SOLD)

\$8,000

- logo placement on official welcome banner
- logo placement on custom golf cart name cards
- logo placement on all IFIC event marketing materials, printed and electronic
- signage at designated hole(s) – one hole per course
- 3/4 page ad in event program
- complimentary passes: one foursome (4 individuals)
- two 9 ft flying banners (one on each course in high traffic areas)
- acknowledgement during morning remarks and award ceremony
- opportunity to promote company at awards ceremony with gift card prize giveaway (minimum value \$100)

IFIC 27TH ANNUAL GOLF CLASSIC

Wednesday July 11, 2018 – Rattlesnake Point, Milton

(Levels cannot be co-sponsored.)

SILVER – GOLF CART SPONSOR (1 AVAILABLE) \$6,500

- complimentary pass: one twosome (2 individuals)
- logo placement on official welcome banner
- acknowledgement during morning remarks and award ceremony
- logo placement on all IFIC event marketing materials, printed and electronic
- opportunity to promote company at awards ceremony with gift card prize giveaway (minimum value \$100)
- single sponsor exclusivity



BRONZE – HOSPITALITY SPONSOR (3 AVAILABLE) \$3,500 ONE OPTION, \$5000 FOR TWO, \$7,500 FOR THREE

Includes one of the following options: Breakfast, Lunch or Cocktail Reception Sponsor.
Take all three and bundle your savings!

- complimentary passes: one foursome (4 individuals) at \$7,500 level, one twosome (2 individuals) at \$5,000 level
- logo placement on official welcome banner
- logo placement during breakfast, lunch or reception based on option(s) chosen
- logo placement on all IFIC event marketing materials, printed and electronic
- acknowledgement during morning remarks and award ceremony
- opportunity to promote company at awards ceremony with gift card prize giveaway (minimum value \$100)

MESSAGE STATION SPONSOR (1 AVAILABLE) \$4,000

- sponsor representative at message stations (optional)
- complimentary pass: one twosome (2 individuals)
- logo placement on official welcome banner
- acknowledgement during morning remarks and award ceremony
- logo placement on all IFIC event marketing materials, printed and electronic
- opportunity to promote company at awards ceremony with gift card prize giveaway (minimum value \$100)
- single sponsor exclusivity

BEVERAGE CART SPONSOR (1 AVAILABLE) \$4,000

- complimentary pass: one twosome (2 individuals)
- logo placement on official welcome banner
- acknowledgement during morning remarks and award ceremony
- logo placement on all IFIC event marketing materials, printed and electronic
- opportunity to promote company at awards ceremony with gift card prize giveaway (minimum value \$100)
- single sponsor exclusivity

GOLF BALL SPONSOR (1 AVAILABLE) \$3,500

- logo placement on official welcome banner
- each golfer will receive a sleeve of golf balls with corporate logo (full colour)
- logo placement on all IFIC event marketing materials, printed and electronic
- opportunity to promote company at awards ceremony with gift card prize giveaway (minimum value \$100)
- single sponsor exclusivity



IFIC 27TH ANNUAL GOLF CLASSIC

Wednesday July 11, 2018 – Rattlesnake Point, Milton

(Levels cannot be co-sponsored.)

CONTEST SPONSOR (1 AVAILABLE)

\$2,500

Sponsor exclusivity including corporate logo displayed individually on four holes (two on each course) during the tournament. Each Contest Sponsor Package includes one of the following:

- logo placement at contest holes
- logo placement on official welcome banner
- logo placement on all IFIC event marketing materials, printed and electronic
- acknowledgement during morning remarks and award ceremony
- opportunity to promote company at awards ceremony with gift card prize giveaway (minimum value \$100)

HOLE SPONSOR (8 AVAILABLE - 6 SOLD)

\$1,700

- signage at designated hole(s) – one hole per course
- logo placement on all IFIC event marketing materials, printed and electronic
- opportunity to promote company at awards ceremony with gift card prize giveaway (minimum value \$100)

GOLD



Broadridge

SILVER

FUNDATA

GOLF BALL

MarketConnections

HOLE



B2B BANK

MORNINGSTAR



Northern Trust

SGGG FUND SERVICES INC.

symcor
DEDICATED TO YOUR SUCCESS

TRSB
Translation and Localization

IFIC 27TH ANNUAL GOLF CLASSIC

Wednesday July 11, 2018 – Rattlesnake Point, Milton

CONTACT INFORMATION

Name of Organization:	
Contact Person:	Title:
Address:	
City:	Postal Code:
Telephone:	Fax:
Email:	Website:

SPONSORSHIP LEVEL	CAD	AVAILABLE	CHECK ALL THAT APPLY
Platinum Sponsor	\$15,000	1	<input type="checkbox"/>
Diamond – Welcome Gift Sponsor	\$12,000	1	<input type="checkbox"/>
Gold Sponsor	\$8,000	1 available - 1 SOLD	<input type="checkbox"/>
Silver – Golf Cart Sponsor	\$6,000 SOLD	1	<input type="checkbox"/>
Bronze – Hospitality Sponsor		3	<input type="checkbox"/>
	One – \$3,500		<input type="checkbox"/>
	Two – \$5,000		<input type="checkbox"/>
	Three – \$7,500		<input type="checkbox"/>
Massage Station Sponsor	\$4,000	1	<input type="checkbox"/>
Beverage Cart Sponsor	\$4,000	1	<input type="checkbox"/>
Golf Ball Sponsor	\$3,000 SOLD	1	<input type="checkbox"/>
Contest Sponsor	\$2,500	1	<input type="checkbox"/>
Hole Sponsor	\$1,700	8 available- 6 SOLD	<input type="checkbox"/>

PAYMENT INFORMATION

PAY BY CREDIT CARD

Charge my credit card \$	<input type="checkbox"/> VISA	<input type="checkbox"/> MasterCard	<input type="checkbox"/> Amex
Card Number:	Expiry Date:		
Cardholder Name:	Cardholder Signature:		

PAY BY CHEQUE: Please make cheques payable to “The Investment Funds Institute of Canada”

Mailing Address: 11 King Street West, 4th floor
Toronto, Ontario, M5H 4C7
Attention: Melissa Wood

Manager, Marketing and Member Communications

NOTE: Payment must be received 10 business days before event.

To reserve your sponsorship, scan and email this sponsorship form to: Melissa Wood (mwood@ific.ca)

Sponsorship levels are only confirmed upon IFIC’s receipt of this form followed by an email confirmation from the Manager, Marketing and Member Communications.

IFIC ANNUAL LEADERSHIP CONFERENCE

Thursday September 27, 2018
The Carlu, Toronto

Canada's pre-eminent networking and information event for the investment funds industry, IFIC's Annual Leadership Conference features an outstanding line-up of speakers and topics. Panel discussions will delve into the latest developments in distribution, new products, regulation, technology and compliance and will put your organization at the forefront of today's emerging issues and trends.

	DIAMOND \$15,000	PLATINUM \$12,500	GOLD \$10,000	NETWORKING LUNCH \$10,000	SILVER \$7,500	BRONZE \$5,000	MOBILE CHARGING STATION 1/\$3,500 or 2/\$6,000	GENERAL \$3,500	MEDIA \$5,000 or contra	MEDIA \$15,000 or contra
Quantity Available	SOLD	3	2	1	3	SOLD	1	∞	trade	consumer
Conference Registrations	4	3	2	2	1	0	0	0	1	3
Exhibitor Passes**	2	2	1	1	1	0	0	0	0	0
Opportunity to introduce speaker/session	✓	✓	✓							
Opportunity to distribute whitepaper/ research article through event app to attendees	✓	✓	✓	✓						
Logo on official notebook/notepad*			✓							
Exclusive opening splash page ad on event mobile app	✓									
Timed splash screen ad on event mobile app	✓	✓								
Session sponsor banner ads on event mobile app			✓	✓						
Timed push notifications on event mobile app		✓	✓	✓						
Recognition on event website agenda as sponsor of premium or featured session		✓	✓							
Logo on conference homepage	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Banner ad on IFIC Weekly Update - 4 issues	✓									
Call out box in IFIC Weekly Update - 3 issues (to be shared with other platinum sponsors)		✓								
Media sponsor recognition on IFIC Weekly Update									✓	✓
Prominent placement on conference signage (digital and/or print)	✓	✓								
First choice of booth location (includes 6 ft skirted table and 2 chairs)	✓									
Second choice of booth location (includes 6 ft skirted table and 2 chairs)		✓								
Third choice of booth location (includes 6 ft skirted table and 2 chairs)			✓	✓						✓

IFIC ANNUAL LEADERSHIP CONFERENCE

Thursday September 27, 2018 – The Carlu, Toronto

	DIAMOND \$15,000	PLATINUM \$12,500	GOLD \$10,000	NETWORKING LUNCH \$10,000	SILVER \$7,500	BRONZE \$5,000	MOBILE CHARGING STATION 1/\$3,500 or 2/\$6,000	GENERAL \$3,300	MEDIA \$5,000 or contra	MEDIA \$15,000 or contra
Quantity Available	SOLD	3	2	1	1	SOLD	1	∞	trade	consumer
Conference Registrations	4	3	2	2	1	0	0	0	1	3
Exhibitor Passes**	2	2	1	1	1	0	0	0	0	0
Fourth choice of booth location (includes 6 ft skirted table and 2 chairs)					✓					
Post event survey sponsor	✓									
Branded cocktail reception	✓									
Breakfast sponsor (co-hosted)		✓								
Breaks sponsor (co-hosted)						✓				
Exclusive sponsorship of Featured Guest Speaker	✓									
Choice of premium session (first-confirmed, first served)		✓								
Choice of one track session (first-confirmed, first served)			✓							
Sponsorship recognition in all event marketing, including web, email, social media, direct and on-site marketing	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Press release opportunity	✓	✓	✓	✓						
Attendee list sent pre and post event	✓	✓	✓	✓	✓	✓	✓			

*Gold sponsors are the official sponsor of the conference notebook/notepad. Only Gold sponsor logos and the official conference logo will be branded on the official notebook/notepad.

Exhibitor passes exclude entry to all conference sessions. Passes include breakfast, lunch and breaks. Extra exhibitor passes cannot be issued, but can be transferred to one other person for coverage purposes. **Maximum exhibit staff – (two) 2 persons.

IFIC ANNUAL LEADERSHIP CONFERENCE

Thursday September 27, 2018 – The Carlu, Toronto

CONTACT INFORMATION

Name of Organization:	
Contact Person:	Title:
Address:	
City:	Postal Code:
Telephone:	Fax:
Email:	Website:

SPONSORSHIP LEVEL	CAD	AVAILABLE	CHECK ALL THAT APPLY
Diamond Sponsor	SOLD	1	<input type="checkbox"/>
Platinum Sponsor	\$12,500	3 - 1 SOLD	<input type="checkbox"/>
Gold Sponsor	\$10,000	2 - 4 SOLD	<input type="checkbox"/>
Networking Lunch Sponsor	\$10,000	1	<input type="checkbox"/>
Silver Sponsor	\$7,500	1 - 3 SOLD	<input type="checkbox"/>
Bronze Sponsor	SOLD	2	<input type="checkbox"/>
Mobile Charging Station Sponsor		2	<input type="checkbox"/>
	One – \$3,500	1 available - 1 SOLD	<input type="checkbox"/>
	Two – \$6,000		<input type="checkbox"/>
General Sponsor	\$3,300	Unlimited	<input type="checkbox"/>
Media Sponsor	\$5,000 or contra	Trade	<input type="checkbox"/>
Media Sponsor	\$15,000 or contra	Consumer	<input type="checkbox"/>

PAYMENT INFORMATION

PAY BY CREDIT CARD

Charge my credit card \$	<input type="checkbox"/> VISA	<input type="checkbox"/> MasterCard	<input type="checkbox"/> Amex
Card Number:	Expiry Date:		
Cardholder Name:	Cardholder Signature:		

PAY BY CHEQUE: Please make cheques payable to “The Investment Funds Institute of Canada”

Mailing Address: 11 King Street West, 4th floor
 Toronto, Ontario, M5H 4C7
 Attention: Meilssa Wood

Manager, Marketing and Member Communications

NOTE: Payment must be received 10 business days before event.

To reserve your sponsorship, scan and email this sponsorship form to: Melissa Wood (mwood@ific.ca)

Sponsorship levels are only confirmed upon IFIC’s receipt of this form followed by an email confirmation from the Manager, Marketing and Member Communications.

IFIC ANNUAL OPERATIONS DAY

Thursday, November 15, 2018
Toronto Board of Trade, Toronto

At IFIC's annual Operations Day, industry experts and senior level operations executives share their insights. Speakers and panels discuss the current trends, challenges, programs and practical measures that will help you and your team adapt to the evolving regulatory landscape.

GOLD SPONSOR (1 AVAILABLE)

\$10,000

- single sponsor exclusivity
- exclusive sponsor of keynote speaker/panel (includes introduce speaker/panel)
- opportunity to make opening welcome remarks
- MC acknowledgement during opening and closing remarks
- table top display – 6 ft skirted table with two chairs provided (optional)
- exclusive opening splash page ad on event mobile app
- opportunity to distribute marketing materials or promotional items to delegates at booth
- premier logo placement on all IFIC event marketing materials, printed and electronic
- complimentary event passes: 3



COCKTAIL RECEPTION SPONSOR (1 AVAILABLE)

\$5,000

- single sponsor exclusivity
- opportunity to introduce cocktail reception (optional)
- priority logo placement on all IFIC event marketing materials, printed and electronic
- table top display – 6 ft skirted table with two chairs provided (optional)
- signature branded cocktail
- gifting opportunity to promote company through items distributed during reception
- acknowledgement during morning and closing remarks
- complimentary event passes: 2

SESSION SPONSOR (2 AVAILABLE BASED ON AGENDA - 3 SOLD)

\$4,500

- opportunity to introduce your organization's sponsored session
- opportunity to distribute marketing materials or promotional items to delegates at booth
- session sponsor banner ads on event mobile app
- MC acknowledgement during opening remarks
- logo placement on all IFIC event marketing materials, printed and electronic
- complimentary event passes: 1
- table top display – 6 ft skirted table with two chairs provided (optional)

BREAKS SPONSOR (1 AVAILABLE)

\$3,000

- single sponsor exclusivity of both morning and afternoon breaks
- logo placement on all IFIC event marketing materials, printed and electronic
- MC acknowledgement during opening remarks
- 8.5" x 11" signs with logo on food tables
- sponsorship level does NOT include an



IFIC ANNUAL OPERATIONS DAY

Thursday, November 15, 2018 – Toronto Board of Trade Toronto

BREAKFAST SPONSOR (1 AVAILABLE)

\$2,500

- single sponsor exclusivity
- MC acknowledgement during opening remarks
- logo placement on all IFIC event marketing materials, printed and electronic
- 8.5" x 11" signs with logo on food tables
- logo placement on all IFIC event marketing materials, printed and electronic
- MC acknowledgement during opening remarks
- **NOTE: this sponsorship level does NOT include an event pass**



GENERAL SPONSOR (UNLIMITED)

\$1,500

- logo placement on all IFIC event marketing materials, printed and electronic
- MC acknowledgement during opening remarks
- **NOTE: this sponsorship level does NOT include an event pass**

IFIC ANNUAL OPERATIONS DAY

Thursday, November 15, 2018 – Toronto Board of Trade, Toronto

CONTACT INFORMATION

Name of Organization:	
Contact Person:	Title:
Address:	
City:	Postal Code:
Telephone:	Fax:
Email:	Website:

SPONSORSHIP LEVEL	CAD	AVAILABLE	CHECK ALL THAT APPLY
Gold Sponsor	SOLD	1	<input type="checkbox"/>
Cocktail Reception Sponsor	\$5,000	1	<input type="checkbox"/>
Session Sponsor	\$4,500	2 (based on agenda) - 3 SOLD	<input type="checkbox"/>
Breaks Sponsor	SOLD	1	<input type="checkbox"/>
Breakfast Sponsor	SOLD	1	<input type="checkbox"/>
General Sponsor	\$1,500	Unlimited	<input type="checkbox"/>

PAYMENT INFORMATION

PAY BY CREDIT CARD

Charge my credit card \$ VISA MasterCard Amex

Card Number: Expiry Date:

Cardholder Name: Cardholder Signature:

PAY BY CHEQUE: Please make cheques payable to “The Investment Funds Institute of Canada”
Mailing Address: 11 King Street West, 4th floor
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PAST SPONSORS

Through their organizations' investments in IFIC events, the following companies have forged and built new relationships, extended their brand and positioned themselves as innovative leaders.

ADVISOR'S EDGE



Broadridge®

CGI

CIBC MELLON

CONFLUENCE®

Donnelley
Financial Solutions

Dynamic Funds®

FUNDATA
DATA THAT MATTER

fundserv
certainty.

L'INSTITUT
IFSE
INSTITUTE
YOUR PARTNER IN
FINANCIAL SERVICES EDUCATION
VOTRE PARTENAIRE DANS
L'ÉDUCATION DES SERVICES FINANCIERS

INTERNATIONAL FINANCIAL
DATA SERVICES

informCO
Delivering Memorable Communications

IE INVESTMENT
EXECUTIVE

Investor | COM
Single Consultant Communications

LTI

MarketConnections

MORNINGSTAR®

MULTIFONDS®
Building success

Northern Trust

RBC Investor &
Treasury Services

ScotiaFunds®

SGGG FUND
SERVICES INC.

symcor
DEDICATED TO YOUR SUCCESS

TMX
Toronto Stock
Exchange

TRSB
Translation and Localization