



Setting the global standard for investment professionals

ASSET ALLOCATION FOR PRIVATE CLIENTS 18-19 NOVEMBER 2008, ATLANTA, GEORGIA, USA **Tabletop Exhibit Policies and Guidelines**

Benefits of Exhibiting:

- One complimentary full conference registration
- Two "Exhibit Only" passes
- Complimentary link from CFA Institute's Internet web site to exhibitor's home page.
- Recognition in promotional brochures and in conference materials distributed to participants on-site (when appropriate deadlines are met by exhibitor)
- A complete pre- and post-conference attendee mailing list which may be used to promote exhibitor's participation
- One identification sign displaying company name
- \$250 discount on advertising in the *Financial Analysts Journal* and *CFA Magazine*

Exhibit Fee

6' x 30" Tabletop US\$5,500

Exhibit Location and Set-Up

Attendee registration, the opening reception, daily continental breakfasts, luncheon desserts, and morning and afternoon refreshment breaks will be held in the exhibit area.

All materials, displays, and/or equipment used as part of the tabletop presentation must fit on the surface of the table or on the easel provided.

Exhibit set-up is scheduled for Tuesday, 18 November 2008, beginning at 6:00 a.m. Set-up must be complete by 7:00 a.m. Attendee registration and Continental Breakfast with the Exhibitors will begin at 7:00 a.m. Additional time is available upon request, before the date of set-up.

To Reserve Your Tabletop:

Fax the Tabletop Exhibit Reservation Form to the attention of Andy Jenkins (Fax: 434-951-5350). Tabletops will be allocated on a first-come, first-served basis. Future correspondence will give you the opportunity to select your exact booth location.

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Payment Policy

The following will be required within two weeks of reserving your tabletop to maintain the exhibit reservation:

- One half of balance due (US\$2,750).
- Two signed copies of the enclosed Exhibitor Agreement (“Agreement”). CFA Institute will sign both copies and return one for your records.

The remaining balance due (US\$2,750) must be paid on or before **Wednesday, 8 October 2008**.

Participant List Policy

CFA Institute will provide each exhibitor with a list of seminar participants, including names, titles, companies, and mailing addresses, at least two weeks prior to the conference. After the conference, CFA Institute will provide a list of actual participants to any exhibiting firm upon request. Attendee information is available in encrypted list or label format.

Promotional Information

A brief description of the exhibiting firm (30–40 words; CFA Institute reserves the right to edit as needed) will be included the CFA Institute website and in the on-site materials distributed to conference attendees, provided the following has been accomplished before each copy deadline:

- One half of balance due (US\$2,750) has been received by CFA Institute.
- The Exhibitor Agreement has been signed and returned to CFA Institute.

Deadline for inclusion in the on-site conference materials: Wednesday, 16 July 2008

Exhibit Staff On-Site Policy

No more than three staff per exhibiting firm will be permitted in the exhibit area at any one time. While in the exhibit area or attending any conference activity, all exhibit staff must wear the identification badges provided by CFA Institute. Two types of identification badges will be issued, authorizing different access to conference functions. Please read the following policy carefully.

Badge Policy

CFA Institute will provide each exhibiting firm with one complimentary registration (Attendee Badge). *Attendee badges allow access to all sessions and luncheons.* Attendee badges will be issued to the exhibiting firm rather than a firm representative and may be exchanged among the exhibit staff of that firm. Additional full conference registrations may be purchased at the discounted CFA Institute member rate, subject to availability.



CFA Institute will provide each exhibiting firm with two exhibit registrations (Exhibitor Badge). *Exhibitor badges allow access to the exhibit area only. Exhibitor badges are **not** full conference registrations and do not qualify their holders to attend sessions, workshops, or luncheons.* Exhibitor badges will be issued to the exhibiting firm rather than a firm representative and may be exchanged among the exhibit staff of that firm.

CFA Institute reserves the right to charge up to a full registration fee to any unauthorized person attending sessions or luncheons.

Floor Pass Policy for Non-Registered Clients or Guests of Exhibiting Firms

No floor passes will be issued or sold to non-registered clients or guests of exhibiting firms. **No** non-registered clients or guests of exhibiting firms will be permitted access to the exhibit area.

CFA Institute reserves the right to charge up to a full registration fee per unauthorized person for any exhibiting firm allowing non-registered clients or guests into the exhibit area.

Use of Exhibit Space

No exhibiting company may sublet or share any part of the space allotted, or may represent, advertise, or distribute literature for the product or services of any other firm or individual except as approved in writing by CFA Institute before **Friday, 31 October 2008**. This does not pertain to trade agreements, but does pertain to related companies. In any circumstance, only one exhibiting firm will be listed as the official exhibitor in the promotional materials distributed by CFA Institute.

Distribution of flyers, samples, invitations, or any exhibitor materials is limited to the exhibit area only.

Souvenirs/Samples

Distribution of souvenirs or samples—done in a dignified fashion and limited to the exhibit area—is permitted provided they have been approved in writing by CFA Institute. **Please submit a souvenir sample with request for permission to the CFA Institute contact by Friday, 31 October 2008.**

Contact: andy.jenkins@cfainstitute.org Tel: (434) 951-5594; Fax (434) 951-5350