



Setting the global standard for investment professionals

2009 CFA INSTITUTE ANNUAL CONFERENCE

26 – 29 APRIL, 2009, ORLANDO, FLORIDA, USA

Exhibit Policies and Guidelines

Participant List Policy

CFA Institute will provide each exhibitor with a list of conference participants, including names, titles, companies, and mailing addresses, at least three weeks prior to the conference. The mailing list is limited to a one-time use only and is to be used to promote exhibitor's participation in the 2009 CFA Institute Annual Conference. After the conference, CFA Institute will provide a list of actual participants to any exhibiting firm upon request. Attendee mailing information is available in an encrypted list or printed label format. Telephone, e-mail, and fax numbers are not available.

Promotional Information

A list of participating exhibitors, a logo, and/or brief description of each firm (30–40 words; CFA Institute reserves the right to edit as needed) will be included in select promotional mailings and in the on-site materials distributed to conference attendees, provided one half of balance due and the signed Exhibitor Agreement have been received by CFA Institute prior to each applicable copy deadline. The brochure copy deadlines are as follows:

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|---|---------------------|
| ➤ Promotional Brochure with Logos (Jan. '09) | 5 Nov. 2008 |
| ➤ Brochure Listing all Sponsors and Exhibitors (Feb. '09) | 2 Dec. 2008 |
| ➤ On-site Event Guide | 27 Feb. 2009 |

**Note: Deadlines may change. Exhibitors will be notified immediately if changes are required.*

Exhibiting also includes a complimentary link from CFA Institute's Conference Web site (<http://www.cfainstitute.org/conferences/>) to the supporter's home page.

Note: Signed Exhibitor Agreement, initial payment, and the Information and Description Form must be received prior to applicable copy deadlines in order to be listed in the corresponding brochures.

Souvenirs/Samples

Distribution of souvenirs or samples—done in a dignified fashion and limited to the exhibit booth space—is permitted provided they have been approved in writing by CFA Institute. **Please submit a souvenir sample description via e-mail with a request for permission to the CFA Institute contact by 27 February 2009.**

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Exhibit Staff On-Site Policy

No more than six staff per single booth or 12 staff per double booth 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 two complimentary registrations per single booth or four complimentary registrations per double booth (Attendee Badges). *Attendee badges allow access to all sessions, conference breakouts, luncheons, and the Sunday and Tuesday Evening Receptions.* 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. *If you wish badges to be printed with an individual firm representative's name, all information must be received no later than 31 March 2009. Badges created after 31 March will be made in the exhibiting firm's name and cannot be personalized.* 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 four exhibit registrations per single booth or eight exhibit registrations per double booth (Exhibit Badges). *Exhibit badges allow access to the exhibit area only.* Exhibit badges are **not** full conference registrations and do not qualify their holders to attend sessions, workshops, luncheons, or the Sunday and Tuesday Evening Receptions. *Exhibit badges will be issued to the exhibiting firm rather than a firm representative and may be exchanged among the exhibit staff of that firm. If you wish badges to be printed with an individual firm representative's name, all information must be received no later than 31 March 2009. Badges created after 31 March will be made in the exhibiting firm's name and cannot be personalized.*

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

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.



Exhibit Hours

Exhibit hours are the following:

Sunday, 26 April	2:00 p.m. – 5:00 p.m.
Monday, 27 April	7:30 a.m. – 3:30 p.m.
Tuesday, 28 April	7:30 a.m. – 3:30 p.m.
Wednesday, 29 April	7:30 a.m. – 11:30 a.m.

We *recommend* that at least one exhibitor representative be in the Exhibit Area during all posted exhibit hours.

Exhibit Dismantling

TBA

Booth/Badge Manager

To simplify the flow of information between CFA Institute and exhibit staff, we ask that each exhibiting firm assign one staff person who can fulfill the following functions:

- Be in attendance for the duration of the conference;
- Serve as liaison between the CFA Institute Exhibit Manager and exhibit staff;
- Be responsible for distributing badges and registration packets, and ensuring exhibit staff are aware of exhibit hours and rules; and
- Communicate the company's on-site needs, requests, and problems to the CFA Institute Exhibit Manager.

Please provide the name of the staff person who will perform this function to Andy Jenkins on or before **10 April 2009**.

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 27 February 2009**. 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 booth space only. Any materials, displays, or equipment used as part of the booth presentation must fit in the allotted booth space.