

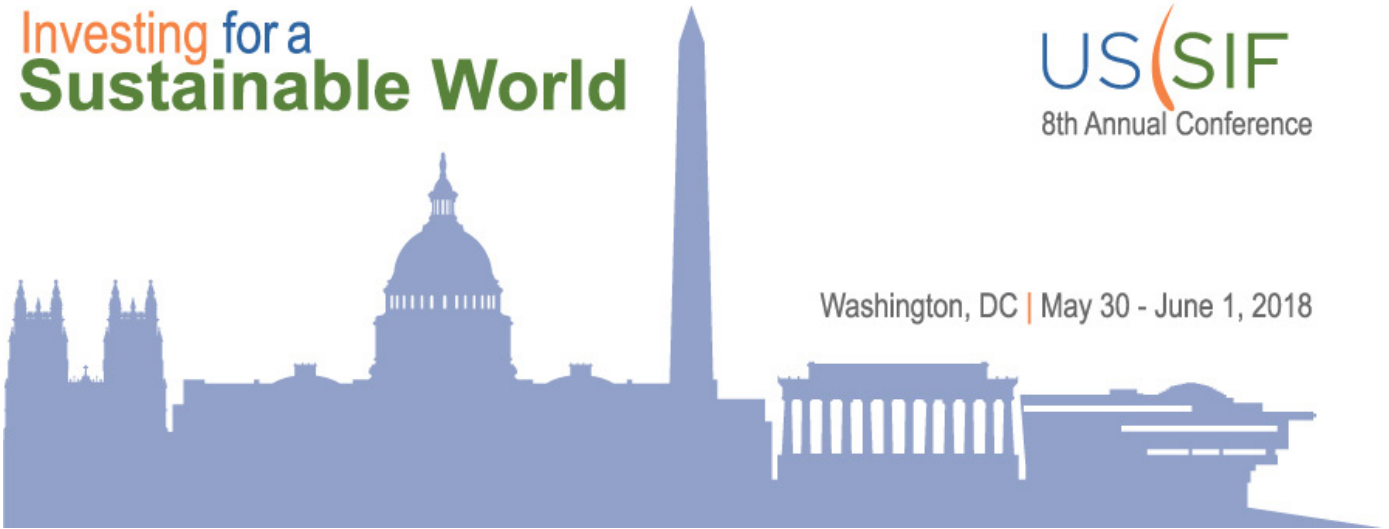
# 2018

## Sponsorship Opportunities

Investing for a  
**Sustainable World**

US(SIF)  
8th Annual Conference

Washington, DC | May 30 - June 1, 2018



US(SIF)

The Forum for Sustainable  
and Responsible Investment

# OVERVIEW

## About US SIF:

US SIF: The Forum for Sustainable and Responsible Investment is the leading voice advancing sustainable, responsible and impact investing across all asset classes. Our mission is to rapidly shift investment practices towards sustainability, focusing on long-term investment and the generation of positive social and environmental impacts. US SIF members include investment management and advisory firms, mutual fund companies, research firms, financial planners and advisors, broker-dealers, community investing organizations, nonprofit associations, and pension funds, foundations and other asset owners. US SIF is a founding member of the Global Sustainable Investment Alliance. Learn more at [ussif.org](http://ussif.org).

## About the Conference:

When: May 30: US SIF Member Day  
May 31–June 1: National Conference

Where: Omni Shoreham  
2500 Calvert Street NW  
Washington, DC 20008

*Investing for a Sustainable World* offers a unique opportunity to network with leaders of the sustainable, responsible and impact investing community and to learn about new approaches, trends and policy developments in the field. The conference attracts representatives of investment management and advisory firms, research firms, financial planners and advisors, broker-dealers, community development institutions and asset owners such as pension funds and foundations, along with policymakers and corporate leaders.

# CONFERENCE ATTENDEES

## Who attends the US SIF Annual Conference?

Since 2011, our event has attracted representatives from the investment, business, civil society, government and non-profit spheres. Below is a sample of institutions represented over the last seven years.

### ASSET OWNERS

- AFL-CIO
- Blue Haven Initiative, LLC
- California State Teachers' Retirement System (CalSTRS)
- California Public Employees' Retirement System (CalPERS)
- Pension Boards—United Church of Christ
- State of Rhode Island Office of the General Treasurer
- The F.B. Heron Foundation
- The Ford Foundation
- The McKnight Foundation
- The John D. and Catherine T. MacArthur Foundation
- UAW Retiree Medical Benefits Trust
- Unitarian Universalist Association
- Wallace Global Fund
- Washington State Investment Board

### SERVICE PROVIDERS AND CONSULTANTS

- Arabella Advisors
- Bloomberg LP
- Cambridge Associates
- Glass Lewis
- ISS
- MSCI
- Morningstar
- Sustainalytics
- Wilshire Associates

# CONFERENCE ATTENDEES

## ASSET MANAGERS

- Alliance Bernstein
- Advisor Partners
- Ariel Investments
- AXA IM
- Bank of America
- BlackRock
- BMO Global Asset Management
- Calvert Research and Management
- Domini Impact Investments
- KKR
- Morgan Stanley
- Natixis Investment Managers
- Neuberger Berman
- Northern Trust
- Parnassus Investments
- Pax World Funds
- Trillium Asset Management
- UBS
- William Blair

## GOVERNMENT

- CDFI Fund, US Department of the Treasury
- Consumer Financial Protection Bureau
- Environmental Protection Agency (EPA)
- Securities and Exchange Commission
- US Department of Energy
- US Department of Labor
- US Senate
- White House Office of Social Justice

## CORPORATIONS

- Advanced Micro Devices (AMD)
- Campbell Soup Company
- Cisco
- Coca-Cola
- Dell
- GE
- General Motors
- Intel
- Johnson Controls
- Marriott
- McCormick & Co.
- McDonalds
- Microsoft
- Yum! Brands

## NGOS

- American Sustainable Business Council
- B Lab
- Ceres
- Council of Institutional Investors (CII)
- Equal Justice Initiative
- CDP
- The Global Impact Investing Network (GIIN)
- The Interfaith Center on Corporate Responsibility (ICCR)
- Oxfam America
- Principles for Responsible Investment

## COMMUNITY INVESTING INSTITUTIONS

- Aeris
- Boston Community Capital
- Calvert Impact Capital
- Chicago Community Loan Fund
- Illinois Facilities Fund (IFF)
- Local Initiatives Support Corporation (LISC)
- Low-Income Investment Fund (LIIF)
- National Community Investment Fund
- Shared Interest



## PAST SPEAKERS

Vice President Al Gore  
Co-Founder, Generation Investment Management

Bill McKibben  
Founder, 350.org

Julia Stasch  
President, The John D. and Catherine T. MacArthur Foundation

Elizabeth Warren  
US Senator (MA)

Deborah Winshel  
Global Head of Impact Investing, BlackRock

Kim Jeffrey  
CEO of Nestle Waters, North America

Seth Magaziner  
General Treasurer, Rhode Island

Thomas E. Perez  
Former US Secretary of Labor

Kurt Summers  
Treasurer, City of Chicago

Darren Walker  
President, Ford Foundation

## SPONSOR BENEFITS

### **As a sponsor of US SIF's 8th Annual Conference, your firm will have:**

- Visibility at a well-attended and thought-provoking event attracting a compelling and wide range of attendees from firms and organizations across the industry;
- Complimentary registration(s);
- Reduced price registrations beyond those included with sponsorship (for designated sponsor levels);
- Marketing opportunities through conference outreach, event signage, and attendee materials;
- Access to attendee contact information before and after the event;
- In-person networking with leaders from across sustainable, responsible and impact investing; and,
- Detailed listing in the conference mobile app, putting links to your company's website and social media accounts at attendee fingertips.

## FEEDBACK FROM OUR SPONSORS

"Campbell (CPB) was an inaugural sponsor when US SIF launched its conference in 2011 and we have been a sponsor since. We support this event because US SIF members and conference attendees are engaged in the long-term success of business, recognizing the potential of well-run businesses to have a positive impact on the planet and in society. We are particularly thrilled to support the Peter DeSimone Student Scholarship as it provides an entryway for the next generation of leaders in sustainable finance and business." - Dave Stangis, Campbell Soup Company

"Pax has sponsored the US SIF Conference since it began in 2011 – a period in which our industry has experienced enormous growth and change. Each year, the US SIF Conference provides our team with the valuable opportunity to reconnect with other sustainable investing leaders and take a deep dive into the ideas and innovations that will move our industry forward." - Joe Keefe, President and CEO, Pax World

# 2018 SPONSORSHIP LEVELS

SPONSORSHIP LEVEL	INVESTMENT
<b>LEAD SPONSOR</b> (sold out) *	<b>\$15,500</b> (non-members \$17,500)
<ul style="list-style-type: none"><li>• Hospitality suite throughout the conference **</li><li>• Dedicated signage throughout event space</li><li>• Premier exhibit space for full event, including Member Day</li><li>• Logo and sponsor information included with speaker appreciation gifts</li><li>• Logo in top location on all marketing materials, including logo with link to sponsor website from the event website and in conference emails</li><li>• Full-page ad on back cover of conference program</li></ul>	<ul style="list-style-type: none"><li>• Five conference registrations</li><li>• Extra conference registrations at 15% discount</li><li>• Three dedicated tweets from US SIF account highlighting Lead sponsorship</li><li>• Invitation to appreciation reception during conference</li><li>• Company profile in conference mobile app</li><li>• Attendee contact information before and after event</li><li>• Three minutes of remarks at Plenary session of choice</li></ul>
<p>* Lead Sponsor is reserved for an investment or financial services institution. ** Sponsor must confirm use of this space at least two weeks before conference. Audio-visual and catering are not included, though US SIF staff are able to assist with connections to the hotel for these requests.</p>	
<b>MEMBER DAY SPONSOR</b> (sold out)	<b>\$12,500</b> (non-members \$14,500)
<ul style="list-style-type: none"><li>• Dedicated signage throughout Member Day event space and acknowledgment on main conference signage</li><li>• Prominent exhibit space for full event, including Member Day</li><li>• Logo in key location on all marketing materials, including logo with link to sponsor website from the event website and in conference emails</li></ul>	<ul style="list-style-type: none"><li>• Full-page ad in prime location in conference program</li><li>• Three conference registrations</li><li>• Extra conference registrations at 15% discount</li><li>• Invitation to appreciation reception during conference</li><li>• Company profile in conference mobile app</li><li>• Attendee contact information before and after event</li><li>• Two minutes of remarks at Member Day</li></ul>
<b>RECEPTION SPONSOR</b> (sold out)	<b>\$12,500</b> (non-members \$14,500)
<ul style="list-style-type: none"><li>• Dedicated signage at Conference Reception and acknowledgment on main conference signage</li><li>• Exhibit space for full event, including Member Day</li><li>• Logo on all marketing materials, including logo with link to sponsor website from the event website and in conference emails</li><li>• Full-page ad in conference program</li></ul>	<ul style="list-style-type: none"><li>• Three conference registrations</li><li>• Extra conference registrations at 15% discount</li><li>• Invitation to appreciation reception during conference</li><li>• Company profile in conference mobile app</li><li>• Attendee contact information before and after event</li><li>• Two minutes of remarks at Conference Reception</li></ul>
<b>PRIME SPONSOR</b> (sold out)	<b>\$11,500</b> (non-members \$13,000)
<ul style="list-style-type: none"><li>• Exhibit space for full event, including Member Day</li><li>• Acknowledgement on conference signage</li><li>• Logo in all marketing materials, including logo with link to sponsor website from the event website and in conference emails</li><li>• Full-page ad in conference program</li></ul>	<ul style="list-style-type: none"><li>• Three conference registrations</li><li>• Extra conference registrations at 15% discount</li><li>• Invitation to appreciation reception during conference</li><li>• Company profile in conference mobile app</li><li>• Attendee contact information before and after event</li><li>• Two minutes of remarks at a Plenary session</li></ul>
<b>MOBILE APP SPONSOR</b> (sold out)	<b>\$9,500</b> (non-members \$11,000)
<ul style="list-style-type: none"><li>• Dedicated banner ad in mobile app</li><li>• Acknowledgment on conference signage</li><li>• Logo in all marketing materials, including logo with link to sponsor website from the event website and in conference emails</li><li>• Half-page ad in conference program</li></ul>	<ul style="list-style-type: none"><li>• Two conference registrations</li><li>• Extra conference registrations at 10% discount</li><li>• Invitation to appreciation reception during conference</li><li>• Company profile in conference mobile app</li><li>• Attendee contact information before and after event</li></ul>



# 2018 SPONSORSHIP LEVELS

## SPONSORSHIP LEVEL

## INVESTMENT

### WIRELESS NETWORK SPONSOR (sold out)

**\$9,500** (non-members \$11,000)

- Naming rights for conference wireless network and log-in credentials
- Choice of landing page when connected to conference wireless network
- Acknowledgment on conference signage
- Logo in all marketing materials, including logo with link to sponsor website from the event website and in conference emails
- Half-page ad in conference program
- Two conference registrations
- Extra conference registrations at 10% discount
- Invitation to appreciation reception during conference
- Company profile in conference mobile app
- Attendee contact information before and after event

### SUPPORTING SPONSOR (3 available)

**\$8,000** (non-members \$9,000)

- Exhibit space for full event, including Member Day
- Acknowledgment on conference signage
- Logo in all marketing materials, including logo with link to sponsor website from the event website and in conference emails
- Half-page ad in conference program
- Two conference registrations
- Extra conference registrations at 10% discount
- Invitation to appreciation reception during conference
- Company profile in conference mobile app
- Attendee contact information before and after event

### PETER DESIMONE STUDENT SCHOLARSHIP SPONSOR (sold out)

**\$6,250** (non-members \$7,000)

Provides conference registration and travel support for up to 6 undergraduate students or graduate students committed to or interested in a career in sustainable investment. This is a joint effort with the US SIF Diversity and Inclusion Initiative and will focus on increasing the overall diversity in the sustainable investment field.

- Exclusive meeting with scholarship recipients during the conference
- Acknowledgment in press release about the scholars
- Acknowledgment on conference signage
- Logo in all marketing materials, including logo with link to sponsor website from the event website and in conference emails
- Quarter-page ad in conference program
- Two conference registrations
- Invitation to appreciation reception during conference
- Company profile in conference mobile app
- Attendee contact information before and after event

### CONTRIBUTING SPONSOR (5 available)

**\$4,500** (non-members \$5,000)

- Acknowledgment on conference signage
- Logo in all marketing materials, including logo with link to sponsor website from the event website and in conference emails
- Quarter-page ad in conference program
- One conference registration
- Invitation to appreciation reception during conference
- Company profile in conference mobile app
- Attendee contact information before and after event

Placement of logos on marketing materials and conference signage, in terms of size and location, and sequencing of ads in the conference program book is based on sponsorship level and commitment date.

#### Sponsors may upgrade ads in the conference program:

- For Mobile App Sponsor, Wireless Sponsor, and Supporting Sponsors: \$1,125 for a full page.
- For Peter DeSimone Student Scholarship Sponsors or Contributing Sponsors: \$1,500 for a full page, \$600 or a half page.

# FAQ's

## What topics are covered?

The US SIF Annual Conference covers a wide range of environmental, social and corporate governance topics. Past conference agendas can be found at [ussif.org/conference](http://ussif.org/conference) click on the link for the year and then on the "Agenda" tab.

## Who sponsors the conference?

A wide variety of corporate and financial leaders have invested in sponsorship of the US SIF Annual Conference, including Bank of America, Breckinridge Capital Advisors, Bloomberg LP, Calvert Impact Capital, Calvert Research and Management, Campbell Soup Company, Cornerstone Capital Inc., Domini Impact Investors, Envestnet, General Motors, Kresge Foundation, Neuberger Berman, Northern Trust, MacArthur Foundation, McCormick, MSCI, Morgan Stanley, Parnassus Investments, Pax World Investments, RBC, Trillium Asset Management, and UBS.

For full details on sponsors of each event, please visit [ussif.org/conference](http://ussif.org/conference), click on the link for the year and then on the "Sponsors" tab.

## Do sponsors have speaking roles?

Designated sponsor levels have the benefit of providing remarks at selected points during the conference; this is separate from invited speakers. And, while representatives from sponsoring organizations have spoken at past conferences given their expertise in the field, sponsorship is not linked to invitations to speak at a session. US SIF welcomes suggestions for speakers and topics.

## Can we purchase exhibit space?

Exhibit space is available only as part of designated sponsorship levels described above.

## Can we purchase additional registrations beyond those provided through sponsorship?

Yes! Starting with the 2018 conference, US SIF is pleased to offer discounted registration rates for Supporting Sponsors and above. Additionally, Peter DeSimone Student Scholarship Sponsors and Contributing Sponsors may purchase additional registrations at US SIF member rates regardless of membership status.

## Further Information:

To learn more about US SIF membership, please visit [ussif.org/join](http://ussif.org/join) or contact us at + 202 872 5361

For inquiries on sponsorship or any other aspect of the conference, please contact:

Suzu Martin  
Events and Marketing Manager  
[smartin@ussif.org](mailto:smartin@ussif.org)  
+ 202 747 7820

