

Organized by



The 2014 USA Financial Services Conference

Towards an integrated transatlantic financial market?

June 2014 / Washington D.C.



Sponsorship Brochure

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www.forum-global.com

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The 2014 USA **Financial Services Conference** Towards an integrated transatlantic financial market?

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About The 2014 USA Financial Services Conference

Following the successful format of The European Financial Services Conference, Forum Global (sister company of Forum Europe) are delighted in 2014 to be launching this major new annual event in the U.S. which will provide a regular platform for experts from across the globe to come together for an exchange of views on EU and U.S. relations and international financial architecture.

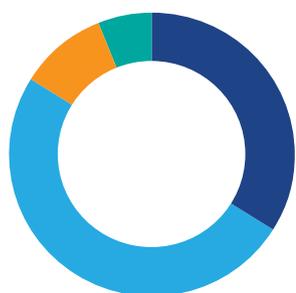
Details of the EU event



Some of the numerous organizations that have benefited from their association with the EU event in past years include:

Ansaldo, Assicurazioni Generali, Atos Origin, Banca Monte dei Paschi di Siena, Blackrock, BNP Paribas Fortis, Borsa Italiana, Citi, City of London Corporation, Cleary Gottlieb, Deutsche Börse Group, DLA Piper, Engineering, eni, Euroclear, European Association of Listed Companies, European Banking Federation, Finmeccanica, Forum of European Asset Managers, Grandi Lavori Fincosit, Indesit Company, ING, International Capital Market Association, Intesa Sanpaolo, Italcementi Group, IW Bank, KPMG, London Stock Exchange Group plc, Managed Funds Association, Moody's Investor Service, Multipartner, Poste Italiane, Poste Vita, PricewaterhouseCoopers, Securities Industry Association, Standard Life, Tesi, TLX and Unicredit Group.

Audience Breakdown 2013



Based on 450 delegates

- 21% Policy makers
- 7% National Financial Authorities
- 58% Corporate Organizations
- 14% Press

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The European Financial Services Conference - Previous Speakers Include:

Joaquín Almunia, EU Commissioner for Economic and Monetary Affairs

Jörg Asmussen, State Secretary, German Federal Ministry of Finance

Paul S. Atkins, Commissioner, SEC

Andrej Bajuk, Minister of Finance & President of Ecofin Council, Republic of Slovenia

Michel Barnier, EU Commissioner for Internal Markets & Services

Lorenzo Bini Smaghi, Member of the Executive Board, ECB

Sir Win Bischoff, Chairman, Citi

Giovanni Carosio, Chairman, CEBS

Liu Chunhang, Director General of the Statistics Department and Research Department, China Banking Regulatory Commission

Christian Clausen, President, EBF, and CEO, Nordea

Vitor Constâncio, Vice-President, ECB

Sandy Crombie, CEO, Standard Life

Cliff Dammers, Secretary General, International Primary Markets Association

Meleveetil Damodaran, Chairman, Securities & Exchange Board of India

Jonathan Faull, Director General, DG Internal Market and Services, European Commission

Alberto Giovannini, CEO, Unifortune

Vittorio Grilli, Chairman, Financial Services Committee of the European Council, and Director General, Italian Treasury

William E. Kennard, U.S. Ambassador to the EU

Wolf Klinz, MEP, European Parliament

Philip Lowe, Director-General, DG Competition, European Commission

Erkki Liikanen, Governor, Bank of Finland

Mario Monti, Former European Commissioner for Competition

Johnathan Moulds, President, EMEA, Bank of America Merrill Lynch

Peter Nyberg, Director-General of Financial Markets, Ministry of Finance, Finland

Tommaso Padoa Schioppa, Former Minister of Finance, Italy

Tom Parlon, Minister of State for Finance, Republic of Ireland

Corrado Passera, CEO, Banca Intesa

Toru Shikibu, Deputy Commissioner for International Affairs, Japanese Financial Services Agency

Mark Sobel, Deputy Assistant Secretary for International Finance, US Department of the Treasury

Ethiopsis Tafara, Director, Office of International Affairs, SEC

Pedro Solbes Mira, Former European Commissioner for Monetary Affairs & Spanish Minister of Economy and Finance

Koos Timmermans, Vice-Chairman, ING Bank
David Wright, Secretary General, IOSCO

Sponsorship of The 2014 USA Financial Services Conference

Annual events such as this are not simply stand alone, one-off marketing opportunities. Over time, they develop a brand of their own and a reputation for quality which adds value for all organizations that are associated with it. The 2014 USA Financial Services Conference offers sponsoring organizations the opportunity to become involved on a regular basis in a pivotal and talked about industry event.

There are a number of different ways in which you will benefit from taking out a sponsorship package at The 2014 USA Financial Services Conference. Simply having your name and brand associated with a high-level event such as this can be extremely valuable and it provides a great opportunity to raise your profile within the industry and with high level policy and decision makers.

Alternatively, should you wish to take a more active and high-profile role at the event, we are offering companies the chance to become an event host. In this scenario up to 3 organizations will act as hosts, with Forum Global's role as event organiser very much secondary to this. In addition to the very high level of visibility offered by this package, the event host is able to influence the scope of the event, and recoup their initial financial commitment via the sale of small sub-sponsorship packages.

Further details of the host package and all our other sponsorship opportunities can be found on the following pages. For more information and to discuss your sponsorship requirements, please contact **Charlene Selmer** on:

charlene.selmer@forum-global.com or call +44 (0) 2920 783 024.

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Event Host Package

Event Host Package: Initial outlay \$35,000 (with the opportunity to offset this cost in full)

As an event host, your organization would be seen as being a driving force behind the organization of the event. This gives you scope to shape the conference program and provide input into the issues to be discussed in each session.

Full benefits of becoming a host include:

Exclusive Speaking Opportunity

- The opportunity to put forward a senior individual to represent the organization in a high-visibility speaking slot, in the session of your choice.

Support the development of the Conference Program

- The opportunity to support the development of the conference program and have significant input and influence as part of this process, in liaison with the other event hosts (limited at 3).
- Personal invitations to all speakers sent out by Forum Global on behalf of the hosts (with representatives of the host companies as signatories on all letters).

Speaker/VIP Dinner

One of the highlights of the conference is the VIP/dinner debate on the eve of the conference where speakers and senior policy decision makers meet to discuss global financial markets challenges and issues.

- Your Chairman or CEO invited to attend the speaker/VIP dinner on the eve of the conference.

Host your own table at the lunch debate

Another highlight of the conference is the lunch session on the day of the conference with the participation of senior international speakers.

- One table of 10 people reserved for your company staff and guests.
- Your company logo prominently displayed on the table.
- Your guest invitations and seating plan arranged by your company (with assistance from Forum Global if required).

Prominent Branding

Named as event host on all event material, with top branding and exposure through the marketing beforehand, to the high level attendees who participate on the event day itself and through the high level of post-event press coverage that is expected. This will be displayed on the:

- Front of the conference program, speaker CVs., and lists of participants.
- Invitation mailings, minimum three mailings, each one sent to a targeted list of 5,000 potential participants.

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Event Host Package continued

- Front of the delegate folders.
- Conference platform banner (both fixed and by projection).
- Conference website with hyperlink to your company website.
- Front of the conference report.

Distribution of company literature

- On the day of the conference, a table display for your organization's documentation in a prime location in the refreshments area.
- The opportunity to place a brochure, flyer or other literature into the conference bags.

Conference Report

- A full-page advert for your organization in the conference report, 1000 copies produced and widely distributed
- Consultation on the final report prior to publication.

Offset your initial financial commitment, or even make a profit!

In addition to the benefits listed above, as a host company you would have the option to offset your organization's financial input by offering smaller sponsorship packages (see sponsorship levels on next page) to your contacts and clients. All additional sponsorship revenue brought in by your company is offset against the cost of the initial commitment. This offers you the benefits of high profile visibility at a prestigious conference with the possibility of a very low financial commitment, or even the ability to make a profit from the event.

To discuss in more detail how the conference host opportunity works, please contact the event organiser, Charlene Selmer on the details below.

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Sponsorship Packages

Partnership Package: \$12,500

Speaker/VIP Dinner

One of the highlights of the conference is the VIP/dinner debate on the eve of the conference where speakers and senior policy decision makers meet to discuss global financial markets challenges and issues.

- Your Chairman or CEO invited to attend the speaker/VIP dinner on the eve of the conference.

Host your own table at the lunch debate

Another highlight of the conference is the lunch session on the day of the conference with the participation of senior international speakers.

- One table of 10 people reserved for your company staff and guests.
- Your company logo prominently displayed on the table.
- Your guest invitations and seating plan arranged by your company (with assistance from Forum Global if required).

Prominent Branding

Your company name mentioned "in partnership with..." and your company logo prominently displayed on the:

- Front of the conference program.
- Speaker CVs.
- Lists of participants.
- Invitation mailings, minimum three mailings, each one sent to a targeted list of 5,000 potential participants.
- Front of the delegate folders.
- Conference platform banner (fixed or by projection).
- Forum Global website with hyperlink to your company website.
- Front of the conference report.

Advertisement in the Conference Report

- A full-page advertisement of your company in the conference report, 1000 copies produced and widely distributed.

Table Display

- On the day of the conference, a table display for your company documentation.

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Sponsorship Packages

Support Package: \$7,000

Branding

Your company name mentioned "with the support of. . ." and your company logo displayed on the:

- Front of the conference program.
- Speaker CVs.
- Lists of participants.
- Invitation mailings, minimum three mailings, each one sent to a targeted list of 5,000 potential participants.
- Front of the delegate folders.
- Conference platform banner (fixed or by projection).
- Forum Global website with hyperlink to your company website.
- Front of the conference report.

Advertisement in the Conference Report

- A half-page advertisement of your company in the conference report, 1000 copies produced and widely distributed.

Table Display

- On the day of the conference, a table display for your company documentation.

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Catering Packages

Exclusive Sponsorship of Speaker/VIP Dinner \$9,000

One of the highlights of this event is expected to be the invitation-only Speaker/VIP Dinner Debate, which will take place on the eve of the main conference. With around 30 participants expected, the dinner-debate allows for an open and frank exchange amongst policy and decision makers, in addition to providing an excellent networking opportunity in an intimate environment with a small scale but high-level group.

- Opportunity to introduce and lead dinner-debate
- Three-course dinner for speakers and high-level invited guests
- Three seats at dinner reserved for your representatives or guests
- Opportunity to provide input into guest list and dinner seating plan
- Corporate identity displayed in dining area during dinner
- Corporate identity included on menu cards

Exclusive Sponsorship of Refreshments: \$2,500

- Corporate identity displayed in the refreshment area during coffee breaks
- Opportunity to include branded items such as napkins, chocolates or biscuits for instance (to be provided by sponsor and subject to venue terms and conditions)

In addition to the above benefits, all catering sponsors will also be included in the sponsor section of the event program.

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Product Opportunities

As well as the main Sponsorship Packages, there are also a range of product based branding opportunities available with Forum Global. These have been chosen specifically for their ease of production and value beyond the event itself. The list below is by no means exhaustive and our marketing team will be happy to work with you to create innovative sponsorship packages tailored to the needs of you and your company.



Sponsorship of WI-FI

\$6,000 (based on 200 delegates)

Guests offered complimentary WI-FI access, with your logo included in the program along with access details.



Sponsored Lanyards

\$1700 + cost of production

Lanyards are distributed to all delegates on arrival at the conference, ensuring high visibility of your brand throughout the event.



Data Sticks

\$1700 + cost of production

In addition to providing a high value branded product to delegates beyond the event, conference proceedings can be loaded onto the sticks prior to the event and distributed to delegates on arrival.



Conference Pens and Pads

\$1500 + cost of production

Distributed to all attendees upon arrival, branded pens and pads again offer visibility to you and value to the delegate both during and beyond the event.



Insert in Delegate Packs

\$650

Product or promotional materials can be included within the delegate packs distributed to each participant upon arrival. A high value option providing detailed company information to all delegates.

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Product Opportunities



Conference Badges

\$1250

All delegates are required to wear their personalized conference badge on arrival at the venue. Have your company logo on all delegate badges (position as design allows) and remind delegates of your company's input into the conference.



Advert in the Delegate Handout

The delegate handout is provided both in hard copy and electronically to all attendees at the event. Placing an advert in the handout is a quick, easy and cost-effective way of getting your message across to this high level and targeted list of participants.

Please note: All page sizes are A4 (210mm x 297mm)

Color full page advert - \$600

Color half page advert - \$400

Black and white full page advert - \$400

Black and white half page advert - \$300

The options contained within are negotiable and are listed only as a guide. We look to cater for your individual requirements on a per event basis.

If you wish to discuss any of the information found in this document, please do not hesitate to contact Charlene Selmer.

We look forward to discussing the positive and high value promotion of your organization.

Forum Global

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Sponsorship Reservation Form

I am interested in the (please tick box):

Event Host Package (\$35,000) Partnership Package (\$12,500) Support Package (\$7,000)

I am interested in the: VIP Dinner (\$9,000) Refreshments (\$2,500)

I am interested in the following Product Opportunities (please tick box):

Wi-Fi Sponsored Lanyards Data Sticks Conference Pens & Pads

Insert in Delegate Packs Conference Badges Advert in Delegate Handout

June 2014 / Washington D.C.

Company:

Address:

Name of contact:

Contact
Tel. Number:

Contact
Email:

Signature:

Date:

Please Faxback to +44 (0) 2920 020 432

Please contact **Charlene Selmer** to discuss all opportunities listed in this brochure.

Charlene Selmer, Senior Event Manager

Tel: +44 (0) 2920 783 024 . Fax: +44 (0) 2920 020 432 . Email: charlene.selmer@forum-global.com

Forum Global, 2 - 4 Second floor, High Street Arcade Chambers, Cardiff, CF10 1BE. UK

[On receipt of this information, we will contact you to discuss and confirm your requirements.](#)

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