

ADVISOR SUMMIT ON CLOSED-END FUNDS

Chicago, IL • September 23, 2019 • Mid-America Club Atop the AON Center

We invite you to participate in the next CEFA Advisor Summit. This event offers financial advisors the chance to gain insight from closed-end fund industry experts and portfolio managers, exchange ideas, and obtain the latest information on issues, trends and topics related to CEFs. Speaker presentations and open discussions will focus on understanding, analyzing, and using closed-end funds, including interval funds and BDCs, to position in a diversified portfolio and generate income.

This is a great opportunity to present to a group of Chicago-area financial advisors with particular interest in utilizing CEFs, interval funds, and BDCs for their clients.

The feedback from the past sixteen CEFA Advisor Summits has been very positive. **97%** of the advisors found them beneficial and **96%** would attend the event again.



View from the Mid-America Club atop the AON Center

Generate brand awareness. Build advisor relationships. Network with industry leaders.

Gold Sponsor - \$7,500

- Keynote, moderator or panelist opportunities, as available
- 4 sponsor attendees
- Distribution of post-event registration and attendee lists
- Company logo displayed in all promotions:
 - Digital event communications and promotions
 - Printed materials
 - Advisor Summit event webpage
 - Powerpoint presentation
 - Signage in meeting and registration areas
- Display educational and marketing materials and attendee giveaways at event
- Taped video interview of speaker with audio transcript
 - Videos are distributed through CEFA content platforms
 - Content available for client use and distribution

CEFA Member - FREE

- 2 member attendees at one event per year at no charge

Silver Sponsor - \$5,000

- Panel speaking opportunity
- 2 sponsor attendees
- Distribution of post-event attendee lists
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Bronze Sponsor - \$2,500

- 2 sponsor attendees
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 - Signage in meeting and registration areas
- Display educational and marketing materials at event

For questions and additional information about participation, contact Tim Sullivan at tsullivan@cefa.com or Cole Johnson at cjohnson@cefa.com or by phone at 816.413.8900.

