Global Challenges and Opportunities for the Asset Management Industry
(Formerly Annual Conference on the Globalisation of Investment Funds)
9–11 June 2024, Boston, Massachusetts
# Sponsorship opportunities

## Non-law firms only

**ALL SPONSORSHIP PACKAGES ARE NON-EXCLUSIVE AND NON-NEGOTIABLE**


### Benefits

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Headline conference sponsorship £7,000</th>
<th>Associate conference sponsorship £5,000</th>
<th>Exhibitor display table £1,800</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complimentary sponsor delegate passes. Sponsor delegate passes, given away as part of a sponsorship agreement, cannot be used by speakers, moderators, panellists, Chairs or Co-Chairs, press, adjudicators or anyone listed in the programme. Complimentary delegate passes can only be used by a representative of the sponsoring company or by an in-house/general counsel of a company proposed by the sponsor. The sponsor delegate pass cannot be given to a private practitioner of a law firm. Registration of complimentary delegate passes must be completed no later than 14 days prior to conference commencement date.</td>
<td>Three</td>
<td>Two</td>
<td></td>
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<tr>
<td>Complimentary attendance to all social events including ticketed dinners for named sponsor delegates</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Option to provide two minute promotional video of company, played as delegates enter meeting room prior to each session commencing. <strong>Video to be supplied in .WMV format.</strong></td>
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<tr>
<td>Sponsor logos to appear on all conference promotional materials from date of booking. <strong>(Logo to be supplied in EPS Vector format)</strong></td>
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</tr>
<tr>
<td>Sponsor logo on the cover of the online and final programmes</td>
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<tr>
<td>Sponsor logo to appear inside online and final programmes</td>
<td>•</td>
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</tr>
<tr>
<td>Sponsor logo to appear on the conference holding slide in main session room</td>
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</tr>
<tr>
<td>Sponsor logo to appear on general conference signage</td>
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<td></td>
</tr>
<tr>
<td>Sponsor logo on signage at conference dinner</td>
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<tr>
<td>Sponsor logo on signage at conference reception</td>
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<tr>
<td>Sponsor logo on signage at conference refreshment breaks</td>
<td>•</td>
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<tr>
<td>Sponsor logo on signage at conference luncheon</td>
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</tr>
<tr>
<td>Sponsor/exhibitor logo and link on the conference website</td>
<td>•</td>
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<tr>
<td>Exhibitor display table</td>
<td>•</td>
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</tr>
<tr>
<td>Two exhibitor passes (Exhibitor passes given away as part of an exhibitor sponsorship package, cannot be assigned to a lawyer, even if they are no longer practicing or retired. In addition, the passes cannot be assigned to speakers, panellists, Chairs or Co-Chairs, members of the press or adjudicators. Exhibitor pass holders cannot attend working sessions or social events other than the opening reception, if held. Registration of exhibitor passes must be completed no later than 14 days prior to the conference commencement date).</td>
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<tr>
<td>Full page colour advertisement to be included in the online programme. <strong>Artwork to be supplied no later than 14 days before the conference commencement date.</strong></td>
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<td>Full page colour advertisement to be included in the final programme. <strong>Artwork to be supplied no later than 14 days before the conference commencement date.</strong></td>
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<tr>
<td>Sponsors acknowledged via IBA LinkedIn accounts</td>
<td>•</td>
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</table>

### Notes:

IBA sponsorship packages do not include speaking opportunities. Speaking opportunities cannot be linked to sponsorship discussions or financial arrangements. Neither officers, nor representatives of the Sponsorship Department are authorised to agree, discuss or confirm speaking opportunities at an IBA conference as part of a sponsorship or financial agreement. Please notify Andrew Webster-Dunn, Sponsorship Director, International Bar Association on andrew.webster-dunn@int-bar.org if you are asked to sponsor a conference or event as a condition of an invitation to speak at the conference.

Should you wish to be considered for a speaking position at an IBA Conference, please email conferences@int-bar.org stating the conference of interest and ask to be put in touch with the relevant Conference Chair.

If you have any questions regarding sponsorship of this conference, please email jenny.roote@int-bar.org.
Sponsorship opportunities

Available to all

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<table>
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<tr>
<th>Benefits</th>
<th>Headline social event sponsorship</th>
<th>Conference dinner sponsorship</th>
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Assignment of sponsorships

All sponsorships are non-exclusive and non-negotiable.

Interpretation and definitions

In this agreement, unless the context otherwise requires, the following definitions shall apply:

1. ‘sponsorship’ includes Headline Conference, Associate Conference, exhibitor, Headline sponsor, Conference session, Conference refreshment, Conference refreshment break, Conference lunches or any other category named by the IBA.

2. ‘sponsor’ means an organisation that is named as one of the above listed sponsorship categories or any other category named by the IBA.

3. ‘IBA’ means International Bar Association


5. ‘Data Protection Law’ means the GDPR and all other national, international, or other laws related to data protection and privacy that are applicable to any territory where IBA or IBA processes personal data or is established.

Application/cancellation of sponsorship

Applications to sponsor an event or exhibit at an IBA specialist conference must be made by clicking on the appropriate link in this pack and completing the relevant online booking form.

Exhibitor/sponsorship packages, including benefits and costs cannot be shared between firms or companies. No discount or refund will be given for non-use of benefits by the sponsor associated with a sponsorship package.

Should the sponsor wish to withdraw from being a sponsor of the chosen IBA specialist conference after placing an order, the sponsor will be liable to pay the following amounts:

- Cancellation after Sponsor logo is placed on the relevant IBA specialist conference webpage, up to 60 days prior to the conference commencement date, 50 per cent of agreed value of invoice
- Cancellation 60 days prior to the conference commencement date as shown on the relevant conference webpage, 90 per cent of the agreed value of invoice
- Cancellation 30 days or less prior to the conference commencement date as shown on the relevant conference webpage, 100 per cent of the agreed value of invoice

Cancellation of sponsorship must be directed in writing to:
Andrew Webster-Dunn, Sponsorship Director, International Bar Association, Chancery House, 53-64 Chancery Lane, London, WC2A 1QS United Kingdom or andrew.webster-dunn@int-bar.org

Invoicing

We are now issuing pro-forma invoices rather than final invoices as we recognize income on a cash receipts basis, as such we cannot issue an invoice until the pro-forma invoice is paid. This is a recognised practice by HMRC as per guidelines published in 1970 (see below) and allows us to comply with the VAT regulations imposed on us by the UK authorities. Pro-forma invoices will be sent within 48 hours of the booking being placed. The invoice and receipt will be issued as soon as payment is received, the pro-forma invoice contains all the details that would be included on an invoice, including the VAT rate charged it just has the words pro-forma instead of invoice.

HMRC Published Guidelines (since 1970)

If you need to issue a sales document for goods or services, you have not supplied yet you issue a pro-forma invoice. A pro-forma invoice IS a valid invoice requiring your payment. A pro-forma invoice IS NOT a VAT invoice (you will receive one of those automatically on payment)

All invoices must be paid within 30 days of the date on the invoice or no later than 30 days after the invoice date, whichever is later. Late invoices remaining unpaid at the commencement of the conference must be paid in full at the conference before delegate or exhibitor passes are released. For the avoidance of doubt, you shall not be permitted entry to the Conference unless full payment has been received by us.

No deductions or withholdings

All fees payable to us by you in accordance with the terms contained in this ‘Information’ section shall be paid free and clear of all deductions or withholdings whatsoever. If any deductions or withholdings are required by law to be made from any fees payable to us by you under the terms contained in this ‘Information’ section you shall pay such sum as will, after the deduction of withholding has been made, leave us with the same amount as would have been entitled to receive in the absence of any such requirement to make a deduction or withholding.

If we obtain the benefit of any tax credit or other relief by reference to any such deductions or withholdings as then we shall repay to you such amount as, after such repayment has been made, will leave us in no worse position than we would have had had no such deductions or withholdings been required.

Contract acceptance

The acceptance of the booking shall be at the discretion of the IBA, and upon acceptance, becomes binding. The contract completes at the time the booking form, the agreement to agree and, subject to be completed in this document. The IBA reserves the right to refuse or deny sponsorships to prospective companies, with no explanation.

Sponsorship and speaking at an IBA conference

Under IBA Policy, speaking opportunities at an IBA conference or event CANNOT be linked to exhibiting or sponsorship discussions. Neither Officers, nor representatives of the IBA Sponsorship Department are authorised to agree, discuss, or confirm speaking opportunities at an IBA conference as part of a sponsorship agreement. If you are invited to speak at an IBA conference, and told that a condition of this invitation is that you MUST also pay to exhibit or be a sponsor at the conference, please email Andrew Webster-Dunn, Sponsorship Director, International Bar Association on andrew.webster-dunn@int-bar.org sending proof of your agreement. If it is your understanding that in order to be considered for a speaking slot, you must also exhibit or be a sponsor, or that any other condition of your speaker invitation, the necessary steps will be taken to reimburse your sponsorship funds and provide you with the sponsorship benefits in full.

Complimentary sponsor delegate badges

I BA best practices policy for attendees, exhibitors, and sponsors

IBA provides opportunities for speakers to have direct exposure to conference attendees during the sponsored conference defined in this document. All conference sponsors are expected to abide by the following policy:

(1) conference sponsors will not distribute promotional materials to, or compete with, the hosting of an event at the same time as an IBA sponsored event;

(2) conference sponsors will not interfere with another sponsor’s or exhibitor’s communication with an attendee communication, either directly or indirectly, e.g., the distribution of brochures, other collateral, or areas of a designated exhibit booth.

These and other similar actions will be considered unacceptable and will be prohibited except with the explicit written permission of IBA. All attendees, regardless of whether they sponsor, exhibit or network at an event, are subject to the guidelines of this policy. Attendance at the conference signifies agreement to this policy and subsequent consequences if violated.

Exhibitors and the exhibition hall

Law firms cannot exhibit or distribute literature promoting their firm at an IBA specialist conference. Exhibitors are not permitted to sublet, promote, or distribute books, magazines, journals or printed literature promoting products or services which are not owned, produced or published by the paying exhibitor. Exhibiting companies are not permitted to distribute promotional literature on behalf of law firms or law firm associations. Exhibitors found to be in breach of the above clauses will be instructed to stop or risk expulsion from the exhibition hall.

Exhibitor attendance and badges

The maximum number of named exhibitor passes allocated per exhibitor table for an IBA specialist conference is TWO, no exceptions will be given. No additional badges will be issued at the event. This is to avoid any overlap with other conference or exhibitor attendees. Attendee badges may not be exchanged, swapped, reassigned or given to another person or time at the event. Anyone found to be in the possession of an exhibitor badge that is assigned to someone else will be asked to leave and their exhibitor table will be closed immediately, with no refund or future bookings accepted for the same conference. Only those registered prior to the conference may attend the event. No additional team members from exhibiting companies will be given access to the conference venue and will not be permitted access to the exhibit hall. Each exhibitor pass is valid for the entire duration of the conference. Only those registered prior to the conference may attend the event. No additional team members from exhibiting companies will be given access to the conference venue and will not be permitted access to the exhibit hall. Each exhibitor pass is valid for the entire duration of the conference. Exhibitor passes must not be altered or covered. The exhibitor pass is valid for the duration of the conference. Exhibitor badges cannot be used by lawyers of any description. Exhibitor badge holders must be employed by the exhibiting company, not an agent, visitor or or other third party. Exhibitor badges are not permitted to attend lunches or refreshment breaks are not provided as part of an exhibition or sponsorship package; therefore, exhibitor personnel are not permitted to attend lunches or refreshment breaks; those who do will be asked to leave. Exhibitors are not permitted to invite guests to the conference or exhibition. Notification of changes to exhibitor staff must be sent via email, to the IBA meeting team. ‘Information’ section of this document. Exhibitors must not exchange, swap, or reassign their badge to another person. Hosted accommodation must be booked through the IBA office. All exhibitor passes must be returned to IBA UK office no later than five working days prior to the commencement of the conference.

Exhibitor use of space/promotional material

When exhibiting at any event, demonstration or other promotional activities must be confined to the limits of the area assigned. No sponsor can distribute promotional materials in a breakout room or session. Literature on display shall be limited to reasonable quantities and must not include or distribute promotional material regarding their firm, partner, employee, or exhibit at an IBA conference. Exhibitors who violate these guidelines may be removed from the exhibition hall by the IBA. The IBA will not refund any part of the booth rental and exhibitors will be liable for the full rental amount.

Scheduled exhibition dates and hours

Scheduled exhibition times are from 08:00hrs through to the end of the last working session specified in the programme for each day.

Installation of exhibits
Exhibitors must have display materials unpacked and ready for display, with all packaging cleared away before 08:00hrs on the commencement date of the conference. No work will be permitted once the conference registration desk has opened and the first delegate has arrived. Installation can be completed once delegates have begun the first session.

Booth construction and arrangement

IBA arranges for the erection of necessary draped tables of uniform style. All exhibits must be confined to the limits of the booth as indicated on the floor plan. Exhibitors are responsible for the delivery and removal of their freight to and from the exhibition area. All exhibits shall serve the interests of the members of IBA and be operated in a way that does not detract from other exhibits or the conference. Conference management determines the acceptability of persons, things, conduct, sound equipment and/or printed material and regulates the right to the immediate withdrawal of any exhibit which is believed to be injurious to the event, or of the bottom of the booth or eviction. IBA is not liable for any refund of exhibition fees or any other exhibition-related expenses.

Exhibiting companies assume entire responsibility and hereby agree to protect, indemnify and hold harmless the IBA from all such abuses, damages and claims arising out of injury or damage to the exhibitor's display, equipment and personal property brought upon the premises of the exhibition space if non-delivery is due to any of the following causes including, but not limited to: damage caused by fire, act of God, public enemy, war, or insurrections, strikes, the changing of the laws of the country in which the event is held. Explosive materials or explosives are not permitted in the exhibition area. All exhibits shall serve the interests of the members of IBA and be operated in a way that does not detract from other exhibits or the conference. Conference management determines the acceptability of persons, things, conduct, sound equipment and/or printed material and reserves the right to the immediate withdrawal of any exhibit which is believed to be injurious to the event or of the bottom of the booth or eviction. IBA is not liable for any refund of exhibition fees or any other exhibition-related expenses.

Exhibition freight

Exhibitors are responsible for the delivery and removal of their freight to and from the exhibition venue. The exhibitor is unable to assist in the shipment of materials to and from the conference. All freight must be labelled exactly as specified by the IBA. The IBA will not be held responsible for the loss of any freight materials, especially those incorrectly labelled. Information on shipping can be obtained by contacting Andrew Webster-Dunn at andrew.webster-dunn@int-bar.org or +44 (0)20 7842 0090.

Removal of exhibits

No exhibitor shall commence dismantling or packing product before the end of the final general break on the day of the conference. Each exhibitor is required to arrange with an IBA representative to arrange with the conference venue for the storage of materials until, collected by courier or Shipping Company. The IBA will not act on behalf of an exhibitor for the collection of any freight. All materials remaining after the conference closes or at a time specified; by an IBA representative, will be removed and destroyed by the conference venue staff, if arrangements have not been made for storage or collection. The IBA will not be held responsible for any items left behind.

Sales, samples and souvenirs

No goods are to be sold for delivery on the floor. Orders may be taken for future delivery. Free samples and souvenirs may be given away at your designated booth only. The placing of unauthorised promotional literature or gifts at an IBA conference or social event, is strictly forbidden. All unauthorised items will be removed and in the first instance returned to the representative of the relevant company. All subsequent items will be removed and disposed of without notification.

Insurance

All exhibitors MUST obtain insurance coverage against damage or loss and public liability insurance against injury to the person or property of others. Exhibitors are responsible for the delivery and removal of their freight to and from the exhibition area. The exhibitor is not liable to the owner of the premises or local authority if property brought upon the premises of the exhibition space for any reason caused to the lessee of the venue, its employees and agents.

Compliance

The exhibitor agrees to abide by and comply with all the Terms & Conditions, including any amendments that conference management may make from time to time, set out in this document. The exhibitor further agrees all responsibility for compliance with all pertinent laws, ordinances, regulations, and codes of duly authorized local, state, and federal governing bodies concerning fire, health and safety as well as the rules and regulations of the operators of and/or owners of the property where the conference is held.

Social event sponsors

Sponsors of IBA social events are NOT permitted to erect or display signage or distribute gifts or promotional literature of any kind. No speeches by sponsors are permitted during the sponsored event. The collection of delegate data at an IBA social event is strictly prohibited.

Conference signage/banners logo placements

The logo of a social event sponsor will appear on signage at the relevant sponsored event. Headline Conference, Headline social event sponsor logos will appear on the front cover of a specialist conference programme. These will be placed in alphabetical order from top to bottom. All artworks will be used as supplied. Any amendments may incur additional charges.

Programme logo placements

Logos attributed to organisations supporting and/or sponsoring a specialist conference will appear on the relevant sponsored conference programme along the bottom of the conference page in the following category order: Headline social event, Associate Conference, Conference dinner, Conference reception, Conference luncheon, Conference breakfast. Logos of all conference sponsorship categories will be listed in alphabetical order from left to right. Only logos for Headline Conference sponsors and co-sponsors are permitted to appear on the front cover of a specialist conference programme. These will be placed in alphabetical order from top to bottom. All artworks will be used as supplied. Any amendments may incur additional charges.

Programme – advert placements

Adverts attributed to organisations supporting and/or sponsoring a specialist conference will appear on the website. Adverts will appear in category order as follows: Headline Conference, Headline Social Event Sponsor, Associate Conference Sponsor and Conference dinner sponsor. Within each category of sponsorship, adverts will appear in alphabetical order. Adverts will be liable in no way to the sponsor for losses resulting from such delay or cancellation. IBA will not be liable for the collection of delegate data to the other party as specified in the agreement, and reserves the right to require the immediate withdrawal of any exhibit which is believed to be injurious to the event or of the bottom of the booth.

Function space

It is understood that no rooms, suites, or other space in the conference hotel are to be used for exhibition purposes, workshops, open houses, and similar exhibitor-sponsored affairs, should be checked with the IBA conference management so as not to conflict with any of the programmed events.

Conference postponement or cancellations

IBA at its discretion shall have the right to postpone or cancel the conference and shall be liable in no way to the sponsor for losses resulting from such delay or cancellation. IBA will not be liable for full compensation of this contract as to the delivery of exhibition space if non-delivery is due to any of the following causes including, but not limited to: damage caused by fire, act of God, public enemy, war, or insurrections, strikes, the changing of the laws of the country in which the event is held. For the purposes of this agreement and any amendments to them under the GDPR. IBA Privacy Policy on our website. All artworks will be used as supplied. Any amendments may incur additional charges.

Data Protection

For the purposes of this agreement and party’s processing of personal data in connection with this agreement, the parties agree that each party acts as an independent data controller. Each party shall (i) only process personal data in compliance with and shall not cause itself or the other party to be in breach of, Data Protection Law, (ii) only process the other party’s personal data as reasonably necessary to perform its obligations and exercise its rights under this agreement; (iii) ensure that is has obtained all necessary rights, permission and/or consents required for the disclosure of personal data to the other party as specified in the agreement, and (iv) act reasonably in providing such information and assistance as the other party reasonably request to enable the other party to comply with its obligations under Data Protection Law.

For the purposes of this agreement, the terms personal data, controller, processor, processing data subject and supervisory authority shall have the meanings ascribed to them under the GDPR. IBA Privacy Policy on our website. All artworks will be used as supplied. Any amendments may incur additional charges.