



CPBI | CANADIAN PENSION
& BENEFITS INSTITUTE

CPBI NATIONAL PARTNERSHIP PROGRAM & REGIONAL SPONSORSHIPS 2022





CPBI

CANADIAN PENSION
& BENEFITS INSTITUTE

*Join us in our mission
to provide quality educational content
to the Pension & Benefits Sector*



CPBI helps members stay current and anticipate upcoming changes in their sector.

Over its 60-year history, the Canadian Pension & Benefits Institute (CPBI) has developed a track record of trust and relevance with local and national decision-makers in the employee benefits, pension and institutional investment sectors.

Today, more than ever, CPBI is focused on offering top notch educational activities and networking opportunities so that the professionals in our sector can continue to learn, upgrade their skills, expand their network, and exchange on a wide range of topics.

The CPBI delivers a variety of events throughout the year at the national as well as the regional level, by partnering with us, your organization will achieve broad exposure to a targeted and active audience within the pension, benefits and investment communities.

We are proud to have delivered 100 online professional development events in 2021, resulting in 200 unique sessions in total.

At the end of the day, we all strive to become better at what we do and who we serve in our respective organizations.
Don Forbes,
member since 2002

Our 2022 hybrid offering will combine in-person and online professional development & networking sessions. We ensure an in-person delivery in line with provincial health authority guidelines.

Our **National Partnership Program & Regional Sponsorships opportunities** show that we are committed to helping you:

- Reach your target audience
- Strengthen your brand
- Drive your sales and other goals

CPBI can help you reach your audience.

This document consists of 2 sections.

The 1st section outlines our National Program which includes 2 parts: the National Conference (FORUM) provides targeted visibility, and the Annual Program provides visibility all year long.

The 2nd section outlines the various Regional Sponsorship opportunities offered by each of our 8 Regions, each catering to a different audience.

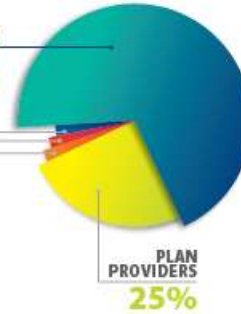


LABOUR UNIONS PHARMACEUTICAL COMPANIES
PRIVATE & PUBLIC CORPORATIONS PROFESSIONAL GROUPS
HUMAN RESOURCE CONSULTANTS **800** EMPLOYERS ACTIVE WITH CPBI
MUNICIPALITIES INSURANCE TRUST COMPANIES
FINANCE & INVESTMENT FIRMS FINANCIAL INSTITUTIONS
GOVERNMENTS & PUBLIC INSTITUTIONS LAW FIRMS

MEMBERSHIP

PLAN SPONSORS
69%

STUDENTS
2%
ASSOCIATES
2%
OTHER
2%





CPBI can help you reach your audience

CPBI NATIONAL PARTNERSHIP PROGRAM

What is the CPBI National Partnership Program?

The National Partnership Program is made up of **two parts**. It combines participation in CPBI's National Conference (FORUM), as well as additional year-round participation & visibility through its Annual Program (educational National webinar series, sponsored showcases, year-round visibility on CPBI's Web Site (ads, white papers), and newsletters).

Part 1: CPBI National Conference (FORUM)

The CPBI FORUM EXPERIENCE allows you to lend your support, be visible, and showcase your expertise to an audience that matters to you. A "must attend" event, FORUM has been held yearly for over 50 years.

Please refer to the table on page 8 for the visibility details.

FORUM FAST FACTS

2021 FORUM Metrics & Feedback:

Our 5-day June 14-18, 2021 Online FORUM included 600 online attendees, 48 speakers, 27 sessions, 18 sponsor-partners.

Some feedback from 2021 Participants & Sponsors:

Just want to say that this is the best online experience I have had in the last 15 months. I have attended many live conferences and so very many webinars etc. lately. Your team has done an incredible job of making this accessible, fresh, easy-to-use. And the content has been excellent. Kudos to you and everyone involved!

A quick note to offer my congratulations and gratitude for a great event! You pulled together an enjoyable, interactive, efficient and impactful virtual conference. I cannot imagine how challenging this must have been, how exhausted you all must be, but hopefully you are able to take a few minutes to reflect on the great outcomes of all of this effort and hours preparing. We are grateful to be in a position to support your valuable work.

I can, without hesitation, tell you that this was the best virtual conference I have been to both from content and platform. It is definitely the standard all those that come after will be held to. Fantastic week!

FORUM 2022: JUNE 13 - 15, 2022

Hybrid Format (In-Person & Virtual Broadcasting): Increased Audience

- The plan is for FORUM 2022 to be held in Montreal, in HYBRID format: in-person and including some virtual broadcasting.
- 250-300 in-person attendees, as well as 300 online attendees
- FORUM In-Person/Hybrid experience will only take place if public health authorities and CPBI Board & Partners deem it safe to be held in-person, including appropriate sanitary measures. The health and safety of the entire CPBI community is of utmost importance, including reputational risk management for both CPBI and its partners.
 - Physical Location is booked: Le Centre Sheraton Hotel, Montreal, QC
 - Date: June 13-15, 2022
- Partnership Levels & Investment will be as follows:
 - Diamond \$30,000 – 1 exclusive spot, including booth
 - Platinum \$25,000 – Max of 10 spots, including booth
 - Gold \$17,300 – Max of 5 spots
 - Silver \$12,500 – Max of 7 spots
 - Bronze \$7,500
 - Booth \$2,500 for Gold, Silver and Bronze PartnersPlease refer to the table on the next page for the visibility details.

FORUM 2022 Patnership Packages Overview

FORUM 2022 VISIBILITY											
	Welcome attendees	Introduce function or session	Logo on function signage	Logo on items	Logo or PPT Ad on screens	Reserved table during Gala	Logo on emails, Ads program, signage	listing in the program	Booth	in person Pass	Online Pass
Diamond Star \$30,000 - Exclusive											
Gala Dinner & Entertainment	✓	✓	✓	✓	✓	✓	✓	✓	✓	3	8
Platinum Star \$25,000 - Max 10 spots											
Welcome Reception - 1 spot	✓	✓	✓	✓	✓	✓	✓	✓	✓	3	7
Tues Lunch & Speaker - 1 spot	✓	✓	✓	✓	✓	✓	✓	✓	✓	3	7
Tues Breakfast & session - 1 spot	✓	✓	✓	✓	✓	✓	✓	✓	✓	3	7
Wed Breakfast & session - 1 spot	✓	✓	✓	✓	✓	✓	✓	✓	✓	3	7
Intro (2) Sessions - 6 spots	✓	✓	✓	✓	✓	✓	✓	✓	✓	3	7
Gold Star \$17,500 - Max 5 spots											
Intro (1) Session - 1 spot	✓	✓	✓	✓	✓	✓	✓	✓		2	5
Hotel Keys - 1 spot				✓		✓	✓	✓		2	5
WIFI sponsor - 1 spot				✓	✓	✓	✓	✓		2	5
Cocktail suite - 2 spots	✓	✓	✓	✓		✓	✓	✓		2	5
Silver Star \$12,500 - Max 7 spots											
Closing Lunch - 1 spot		✓	✓		✓		✓	✓	-	1	3
Health breaks - 4 spots			✓		✓		✓	✓	-	1	3
Social Wall - 3 spots			✓		✓		✓	✓	-	1	3
Bronze Star \$7,500											
Meet-Safe kit - 1 spot				✓		-	✓	✓	-	1 member pass	2
Pens or pads - 2 spots				✓			✓	✓	-	1 member pass	2
Prizes - 2 spots				✓			✓	✓		1 member pass	2
Booth \$2,500 (for sponsors only)											
							✓	✓			2

Part 2: Annual Program: Additional Year-Round National Participation & Visibility

The CPBI National Partnership Program offers a year-round opportunity for you to be visible with an audience that matters to you. This year-round program is included in the National Partnership, regardless of FORUM being delivered in-person (Hybrid) or fully virtual. All opportunities can be delivered in English and French. See table on page 11 for more details.

National Webinar Series – Educational Sessions / Thought Leadership

- The CPBI Program Committee is always looking for cutting edge topics to be featured in its National Webinar Series.
- Platinum-Level Partners can propose content in our call for speakers & topics for 1 of the 10 planned CPBI monthly National Webinars. CPBI is planning 1 session a month (except July and August), offered free to its members and non-members.
- Platinum-Level Partners are limited to 10.
- Working hand-in-hand with the CPBI Program Committee, Platinum-Level Partners are encouraged to propose content and speaker(s) to the Program Committee for discussion and final approval.
- Visibility: your logo included in the banner ad featuring our National Webinar Series partners.

Sponsored Showcases – Promote your Products & Services

- Dedicated Showcase presentation offered to all CPBI users. These are 30 minutes in length, designed to allow a showcase of the Partner's offering. CPBI will market these to its stakeholders as part of its digital marketing plan.
- Hosted by CPBI, on the CPBI virtual platform.
- Your showcase will be added on the CPBI website and communicated to all CPBI users via dedicated emails as well as on CPBI social channels.
- The showcase is complimentary to CPBI members and non-members alike and will be delivered live and on-demand. Statistics and insight will be shared with the Partner. S
- The list of attendees having given their consent will be shared with the Partner.

Logo on the CPBI Website – Brand Awareness

- Your logo will be featured on the CPBI website in the National Partners section.

Banners and Ad boxes – Brand Awareness

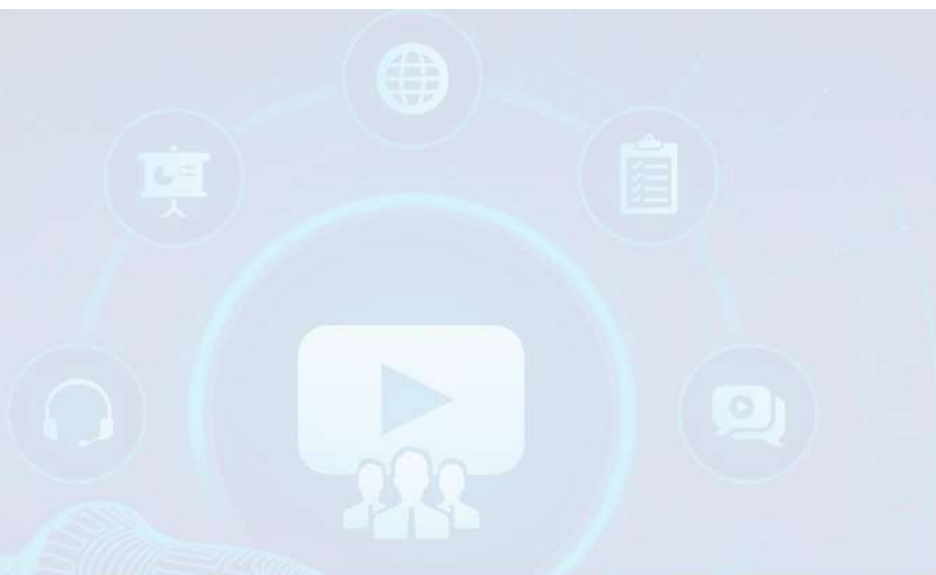
- Ad box placement on the CPBI website is offered to National Partners.
- Each ad box would be visible online for one month.
- Banner placement in CPBI newsletter e-bulletin is also offered to National Partners.

Dedicated emails to CPBI Data Base – Targeted Communication

- Email blast to CPBI Data Base to demonstrate your thought leadership
- Emails can be targeted based on users' interest (pension, benefits or investment)
- You can provide your content in html format or we can prepare the email for you to approve.

Resource materials: Shared with Users and Included in online library

- Share a white paper, survey results or other resources with CPBI users by including them in the CPBI Online library. CPBI audience are notified by a dedicated email with details about your resource material.



Annual Program Year-Round National Participation & Visibility

Part 2: Additional Year-Round Participation & Visibility				
	PLATINUM	GOLD	SILVER	BRONZE
Propose educational content for CPBI monthly National Webinar Series*	1*	--	--	--
Your company is featured during the national webinar series	Yes	--	--	--
Deliver a Sponsored Showcase**	1	--	--	--
Logo in the National Partners section of CPBI website	Yes***	Yes***	Yes***	Yes***
Banner in monthly newsletter (e-bulletin)	Twice a year	Twice a year	Once a year	--
Ad box placement on CPBI website	Twice a year	Twice a year	One a year	--
Inclusion of your resource materials (white papers or other) in CPBI online library	Twice a year	Once a year	--	--
Dedicated email sent to users about resource material	Twice a year	Once a year	--	--

***Webinar Content:** CPBI is planning 10 National Webinar Series in 2022. It is our goal to work hand in hand with our Platinum partners and our Program Committee in offering educational content to our members and CPBI community at large. CPBI prides itself on taking a neutral stance when delivering content and final approval of webinar content remains with the Program Committee.

**** Sponsored Showcases:** These are 30 minutes in length, designed to allow you to showcase the provider's offering. Includes one session in English and one session in French. CPBI cannot guarantee attendance numbers.

***** Logo Size:** Logo size as a function of the partnership level.



CPBI REGIONAL SPONSORSHIP OPPORTUNITIES



Regional Sponsorship opportunities are offered by each of our 8 Regions, each catering to a different audience.

Visibility runs January through December 2022.

Each detailed packages can be found on the following pages.

SPECIAL DISCOUNT FOR JOINING AS A NATIONAL PARTNER & MORE THAN ONE REGION – CONTACT US FOR MORE INFORMATION.

	Atlantic	Quebec	Ontario	Manitoba	Saskatchewan	Northern Alberta	Southern Alberta	Pacific
Annual Program								
Platinum						\$1,250		
Gold		\$2,500	\$5,000	\$1,500		\$1000	\$2,500	\$2,500
Silver		\$1,500	\$2,500	\$1,000		\$750	\$1,500	\$1,500
Bronze		\$500	\$1,000	\$500		\$500	\$500	\$500
One Level	\$2,500				\$1,500			
Golf				\$800				
CONFERENCE	CONFERENCE				CONFERENCE			
Title					\$10,000			
Diamond	TBD				\$4,000			
Platinum	TBD				\$3,000			
Gold	TBD				\$2,000			
Silver	TBD				\$1,500			
Bronze	TBD				\$1,000			
% DISCOUNT for both Annual + Conference	10% off conference				10% off conference			

CPBI Atlantic Region 2022 Annual Sponsorship

January 1, 2022 - December 31, 2022	Annual Sponsorship
Complimentary registrations to 2022 CPBI Atlantic Regular Programming Sessions	12 virtual individual registrations
Discount on CPBI Atlantic Regional Conference Sponsorship.	10%
Verbal Recognition as a Program Sponsor at the start and end of each CPBI Atlantic Regular Programming Session	Included
Recognition on the Atlantic section of the CPBI website	Included
Your Logo in Sponsorship Banner on all 2022 CPBI Atlantic Regular Programming Session <ul style="list-style-type: none"> • Event announcements • Opening Slide Show • Newsletters and Social events (TBD) 	Included
Linked In <ul style="list-style-type: none"> • Opportunity to submit one article, video, or publication relevant to Pension, Benefits, and Investment Information for Atlantic Canadians. This will be posted on CPBI Atlantic LinkedIn page. • Your Logo in Sponsorship Banner posted in various CPBI Atlantic Linked In Posts throughout the year 	Included
Annual Investment	\$2,500

2022 CPBI Atlantic Regional Conference

- Option to sponsor CPBI Atlantic Conference with a **10% discount** on Conference Sponsorship Pricing.
- *Note: Conference Sponsorship Levels are awarded based on first come, first serve basis- with first right of refusal going to previous year's sponsor. **Conference Sponsorship Package will be available in Spring 2022.***

CPBI-ICRA Quebec Region 2022 Annual Sponsorship

January to December 2022	GOLD	SILVER	BRONZE
Free registration for online sessions presented by CPBI Quebec (regular one-hour sessions)	10	5	2
Opportunity to address the public by introducing the keynote speaker	2 x / year	--	--
Verbal recognition of your company name at the start of online sessions (regular sessions)	Yes	Yes	--
Your logo in the sponsorship banner in announcement emails sent to members, key decision makers and other stakeholders, 20 times per year (logo size depending on level)	Yes	Yes	Yes
Recognition on CPBI Quebec Region web page of CPBI web site	Yes	Yes	Yes
Recognition in social media posts	4 x / year	2 x / year	--
Annual Investment	\$2,500	\$1,500	\$500

CPBI Ontario Region 2022 Annual Sponsorship

* Program Sponsorship does not include programs in partnership with HRP.A.

January to December 2022	GOLD	SILVER	BRONZE
Free registrations to any regular one-hour CPBI online sessions (conferences and summits are excluded)	10	5	2
Introduction of the main speaker and one free table of 6 at CPBI Ontario-hosted one-hour events	2 x / year	--	--
Recognition as sponsor at the start of CPBI Ontario-hosted one-hour events (regular sessions)	Yes	Yes	--
Your logo in the sponsorship banner in announcement emails sent to members, key decision makers and other stakeholders, at least 40 times per year (logo size depending on level)	Yes	Yes	Yes
Recognition on the Ontario region web page of the NEW CPBI website	Yes	Yes	Yes
Sponsor recognition in social media posts (4 x per year)	4 x / year	2 x / year	--
Customized LinkedIn Marketing post (as well as in correspondent weekly CPBI Ontario Newsletter)	2 x / year	1 x / year	--
Annual Investment	\$5,000	\$2,500	\$1,000

CPBI Manitoba Region 2022 Annual Sponsorship

January to December 2022	GOLD	SILVER	BRONZE	GOLF ONLY (Learn at the Links event)
Free registration for online sessions presented by CPBI Manitoba (regular sessions)	10	5	2	
Free tickets for the Learn at the Links event	1			2
Opportunity to address the public by introducing the keynote speaker	Once	--	--	--
Verbal recognition of your company name at the start of online sessions (regular sessions)	Yes	Yes	--	--
Your logo in the sponsorship banner in announcement emails sent to members, key decision makers and other stakeholders, 20 times per year (logo size depending on level)	Yes	Yes	Yes	Golf
Recognition on the CPBI Manitoba web page of the CPBI web site	Yes	Yes	Yes	--
Recognition in social media posts	4 x / year	2 x / year	--	Golf
Learn at the Links Golf Event Signage Recognition	Yes	Yes	-	Yes
Annual Investment	\$1,500	\$1,000	\$500	\$800

CPBI Saskatchewan Region 2022 Annual Sponsorship

July 1, 2021 to December 31, 2022	Annual Sponsorship (Unlimited Opportunities)
Complimentary registrations per program year at Saskatchewan regional breakfast, luncheon, or webinars of choice *	Maximum of four (4)
Acknowledgement on seminar announcements, newsletter, and website	Included
Verbal and sign acknowledgement at seminars *	Included
Annual Investment	\$1,500

* Program Sponsorship does not include programs in partnership with Humber College.

CPBI Saskatchewan Region 2022 Regional Conference Sponsorship

SPONSORSHIP DETAILS	Title	Diamond	Platinum	Gold	Silver	Bronze
Sponsorships available	1	3	3	7	4	Unlimited
Complimentary conference registrations	2	2				
Non-member conference registrations at the member rate	4	4	2			
Complimentary passes to the evening dinner (for guests not attending the conference)	4					
Sponsor entire conference including kick-off evening dinner and speaker, plus breakfast buffet & luncheon buffet on both days	Included					
Sponsor luncheon speaker on day 1 or day 2		Included				
Sponsor opening speaker on day 1 or day 2, or Sponsor reception at end of day 1			Included			
Sponsor a breakout session (includes both the pension and benefits presentations)				Included		
Sponsor a health break					•	
Reserved table(s) with preferred placement (at your sponsored event)	Included	Included	Included			
Opportunity to introduce sponsored speaker(s) or to welcome delegates prior to reception at end of day 1 (platinum reception sponsor)	Included	Included	•	•		
Exhibitor table	•	•	•	* Below	* Below	* Below
Special acknowledgement prior to your sponsored event(s)	•	•	•	•	•	
Special signage at sponsored event. On stage entire conference	•	•	•	•	•	
Recognition and logo on attendee brochure cover page	•					
Recognition in press releases and public relations initiatives	•					
Level	Title	Diamond	Platinum	Gold	Silver	Bronze
Price of sponsorship level	\$10,000	\$4,000	\$3,000	\$2,000	\$1,500	\$1,000

CPBI Northern Alberta Region 2022 Annual Sponsorship

July 1, 2021, to December 31, 2022	Platinum	Gold	Silver	Bronze
Free registrations to the online sessions presented by CPBI Northern Alberta (regular sessions)	8	6	4	2
Possibility of addressing the public by introducing our speaker	Included			
Verbal recognition at the start of online sessions (regular sessions).	Included	Included	Included	Included
Your logo in the sponsorship banner in announcement emails sent to members, key decision makers and other stakeholders, 10 times per year (logo size depending on level).	Included	Included	Included	Included
Recognition on the Northern Alberta region web page of the CPBI web site	Included	Included	Included	Included
Recognition in social media posts	4 x per year	3 x per year	2 x per year	1 x per year
Annual Investment	\$1,250	\$1000	\$750	\$500

CPBI Southern Alberta Region 2022 Annual Sponsorship

January - December 2022	Gold	Silver	Bronze
Applicable to on-line events hosted by CPBI Southern Alberta and in-person events when permitted			
Thank you credits to attend events. Credits may be used toward event registrations. ¹	25 credits	15 credits	5 credits
Sponsors recognized and thanked at all educational events held in 2022 and on the Southern Alberta section of the CPBI website.	Included	Included	Included
Sponsors' logo included on announcements, pre-event slide shows and sponsor sheets (logo size depending on level).	Included	Included	Included
Sponsors will be assigned a CPBI liaison for the purpose of communicating potential topic and speaker recommendations to the program committee.	Included	Included	Included
Sponsors may place promotional materials on the registration table and/or in the handouts section of our virtual platform.	Included	Included	N/A
Sponsors may place promotional materials on the delegate tables at the half day education seminars (Benefits 101, Retirement Plans 101, etc.) and/or in the handouts section of our virtual platform.	Included	N/A	N/A
Annual Investment²	\$2,500	\$1,500	\$500

Notes:

- Credits may be redeemed for events:
 - Online events hosted by CPBI Southern Alberta: One hour session = 1 credit; Virtual table = 3 credits
 - In person events when permitted: Lunch = 3 credits; Half-day seminar = 5 credits.
- We will accept up to 10 Gold, 10 Silver and unlimited Bronze sponsorships.

CPBI Pacific Region 2022 Annual Sponsorship

January - December 2022	Gold	Silver	Bronze
Invites to attend CPBI events. Invites may be used toward one or many event registrations. Half and full day seminars except.	40	25	10
Sponsor to introduce keynote speaker	Twice a year	N/A	N/A
Sponsors may place promotional materials on the delegate tables at the half day education seminars (Benefits 101, Retirement Plans 101)	Included	Included	N/A
Sponsors recognized and thanked at all educational events held in 2022 and on the Pacific section of the CPBI website.	Included	Included	Included
Sponsors' logo included on announcements, pre-event slide shows and sponsor sheets (logo size depending on level).	Included	Included	Included
Sponsors will be assigned a CPBI liaison for the purpose of communicating potential topic and speaker recommendations to the program committee.	Included	Included	Included
Annual Investment	\$2,500	\$1,500	\$500
Additional Extra Add On – Sponsor is introduced during a breakout or group discussion session at one of CPBI’s events during the year.	1 Intro Included	1 Intro for \$500	1 Intro for \$500

Notes: 1. We will accept up to 10 Gold, 10 Silver and unlimited Bronze sponsorships



Summary of National Partnership Program & Regional Sponsorships

NATIONAL	HYBRID FORUM (In-Person & Virtual) & Year-Round Visibility (Annual Program)	&	REGIONAL SPONSORSHIPS						
			Level	Level 1	Level 2	Level 3	Golf	Conference	
Diamond	\$30,000		Atlantic		\$2,500				\$1k to \$10k
Platinum	\$25,000		Quebec		\$2,500	\$1,500	\$500		
Gold	\$17,500		Ontario		\$5,000	\$2,500	\$1,000		
Silver	\$12,500		Manitoba		\$1,500	\$1,000	\$500	\$800	
Bronze	\$7,500		Saskatchewan		\$1,500				\$1k to \$10k
			Northern Alberta	\$1,250	\$1,000	\$750	\$500		
			Southern Alberta		\$2,500	\$1,500	\$500		
			Pacific		\$2,500	\$1,500	\$500		