





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 2022, 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 2023 hybrid offering will combine in-person and online professional development and networking sessions.

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.



PRIVATE & PUBLIC CORPORATIONS PHARMACEUTICAL COMPANIES
PRIVATE & PUBLIC CORPORATIONS PROFESSIONAL GROUPS
HUMAN RESOURCE BOOMEN WITH CPBI
MUNICIPALITIES INSURANCE TRUST COMPANIES
FINANCE & INVESTMENT FIRMS FINANCIAL INSTITUTIONS
GOVERNMENTS & PUBLIC INSTITUTIONS
LAW FIRMS

MEMBERSHIP













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 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

2022 FORUM Metrics & Feedback:

Our 3-day June 14-16, 2022 hybrid FORUM attracted 250 attendees distributed equally in person and online, 48 speakers, 27 sessions, 18 sponsor-partners.

Some feedback from 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 2023: JUNE 5 -7, 2023

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

- o FORUM will be held in Winnipeg, MB in HYBRID format: in-person and including some virtual broadcasting.
- o 250-300 in-person attendees, as well as 300 online attendees
- Partnership Levels & Investment will be as follows:
 - Diamond \$35,000 1 exclusive spot, including booth
 - Platinum \$27,500 Max of 10 spots, including booth
 - Gold \$20,000 Max of 6 spots
 - Silver \$12,500 Max of 6 spots
 - Bronze \$7,500 Max of 4 spots
 - Exhibition \$2,500 for Gold, Silver and Bronze Partners
 Please refer to the table on the next page for the visibility details.



FORUM SPONSORSHIP BENEFITS	\$35,000 - Exclusive	PLATINUM \$27,500 - max 10 spots	GOLD \$20,000 - max 6 spots	SILVER \$12,500 - max 6 spots	BRONZE \$7,500 - max 4 spots
Complimentary in person pass	3	3	2	1	1 member pass
Complimentary online pass	10	8	6	4	2
30 minutes in person showcase session included in the conference agenda	✓				
Introduce function or session and speaker(s)	✓	✓	✓		
Company Logo on the tent cards placed on the tables	✓	✓	✓	✓	
Company Logo on the evening program	✓				
Company Logo on drink tickets	✓	✓	✓		
Company Logo on function signage	✓	✓	✓	✓	
Company Logo on sponsored item in the delegate kit	Provided by sponsor	Provided by sponsor			Provided by CPBI
Company Ad/message to play on the screens (PPT Loop)	✓	✓	✓	✓	
Reserved table during Gala Dinner (invite other attendees to come join your team)	✓	✓			
Company description in the program	Aprox 50 words	40 words	30 words	20 words	10 words
Company Logo in the program	✓	✓	✓	✓	✓
Company Logo on all emails sent to promote the function and session as well as as the entire conference	✓	✓	✓	✓	✓
Company Logo on the conference webpage	✓	✓	✓	✓	✓
Company Logo on printed Ads and onsite banners	✓	✓	✓	✓	✓
Recognition during the welcome and closing remarks	✓	✓	✓	✓	✓
Booth in the Exhibition	✓	✓			

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 nonmembers.
- 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.
- 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

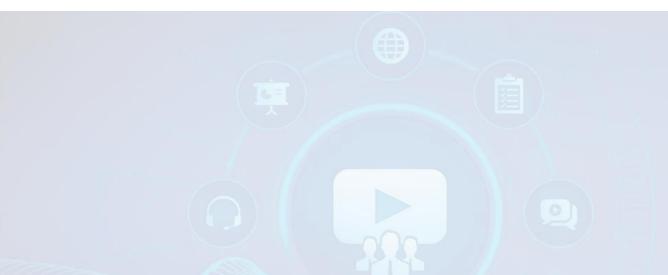
- Ad box placement on the CPBI website is offered to National Partners.
- Each ad box would be visible online for one month.
- Banner placement in CPBI newsletter e-bulletin is also offered to National Partners.

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

ANNUAL PARTNERSHIP BENEFITS	DIAMOND \$35,000 - Exclusive	PLATINUM \$27,500 - max 10 spots	GOLD \$20,000 - max 6 spots	SILVER \$12,500 - max 6 spots	BRONZE \$7,500 - max 4 spots
Opportunity to propose a topic for the CPBI National Webinar series	4	√			
Logo on the emails promoting CPBI National Webinars	✓	✓			
30 minutes sponsored online showcase	✓	✓			
Logo on the CPBI website	✓	✓	✓	✓	✓
Your banner in the CPBI Newsletter	2/year	2/year	1/year	1/year	
Your Ad box on the CPBI website	2/year	2/year	1/year	1/year	1
Dedicated sponsored email blast	2/year	2/year	1/year		
Complimentary National Webinar series pass	10	8	6	4	2

THE CPBI MEMBERSHIP ADVANTAGE





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 2023.

Each detailed packages can be found on the following pages.

WE ARE HAPPY TO DISCUSS A CUSTOMIZED PACKAGE – CONTACT US FOR MORE INFORMATION.

	Atlantic	Quebec	Ontario	Manitoba	Saskatchewan	Northern Alberta	Southern Alberta	Pacific
Annual Program								
Platinum			\$10,000					
Gold		\$2,500	\$5,000	\$1,500		\$2,000	\$2,500	\$2,500
Silver		\$1,500	\$2,500	\$1,000		\$1,000	\$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				\$4,500			
Platinum	TBD				\$3,500			
Gold	TBD				\$2,500			
Silver	TBD				\$1,500			
Bronze	TBD				\$500			
% DISCOUNT for both Annual + Conference	10% off conference				10% off conference			

CPBI Atlantic Region 2023 Annual Sponsorship

January 1, 2023 - December 31, 2023	Annual Sponsorship
Complimentary registrations to 2023 CPBI Atlantic Regular Programming Sessions	18 registration credits
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 2023 CPBI Atlantic Regular Programming event announcements and general newsletters sent to CPBI Atlantic members, key decision makers and other stakeholders.	Included
 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. Please note, direct advertisement is not something we are able to share, just educational content and articles. 	Included
Annual Investment	\$2,500

2023 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 2023.

CPBI-ICRA Quebec Region 2023 Annual Sponsorship

January to December 2023	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 / yr		
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 / yr	2 x / yr	
Annual Contribution:	\$2,500	\$1,500	\$500

CPBI Ontario Region 2023 Annual Sponsorship

^{*} Program Sponsorship does not include programs in partnership with HRPA.

January to December 2023	PLATINUM	GOLD	SILVER	BRONZE
Headline sponsor of one of our three in-person networking events in 2023	1 x / year			
One free table of 8 at CPBI Ontario-hosted sponsored event (1 per year)	1 x / year			
Introduction of the speaker & recognition as headline sponsor to the sponsored in-person event	1 x / year			
Invitation to our Links & Learn event with a discounted foursome.		1		
Free registration to any regular one-hour CPBI online webinar	unlimited	unlimited	10	5
Introduction of the speaker for one of our online seminar programs		1		
Recognition at the start of CPBI Ontario-hosted one-hour webinars	Yes	Yes	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	Yes
Recognition on the Ontario region web page of the NEW CPBI website	Yes	Yes	Yes	Yes
Sponsor recognition in social media posts	4 x / year	4 x / year	2 x / year	

CPBI Ontario Region 2023 Annual Sponsorship - Continued

January to December 2023	PLATINUM	GOLD	SILVER	BRONZE
Customized social media (LinkedIn) Marketing post	2 x / year	2 x / year	1 x / year	
Sponsorship Available	3	5	5	10
Annual Investment	\$10,000	\$5,000	\$2,500	\$1,000

CPBI Manitoba Region 2023 Annual Sponsorship

January to December 2023	GOLD	SILVER	BRONZE	GOLF
Free registration for online sessions presented by CPBI Manitoba (regular sessions)	15 session credits 1 Golf	6 session credits	4 session credits	2 Golf Registrations
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 / yr	2 x / yr		Golf
Learn at the Links Golf Event Signage Recognition	Yes	Yes	-	Yes
Annual Investment:	\$1,500	\$1,000	\$500	\$800

CPBI Saskatchewan Region 2023 Annual Sponsorship

January 1, 2023, to December 31, 2023	Annual Sponsorship (Unlimited Opportunities)
 12 sponsorship credits per program year, credits may be redeemed for events: Online events hosted by CPBI Saskatchewan: 1 hour webinar = 1 credit In person events are calculated by length and cost of session, please reference the event webpage for # of credits per event.* 	Included
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.

Receive a 10% discount by applying for both Program and Conference Sponsorship by November 30, 2022!

CPBI Saskatchewan Region 2023 Regional Conference Sponsorship

SPONSORSHIP DETAILS	Title	Diamond	Platinum	Gold	Silver	Bronze
Sponsorships available	1	3+	4+	6	4	Unlimited
Complimentary conference registrations	4	3	2	1		
Non-member conference registrations at the member rate	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
Complimentary passes to the evening dinner (for guests not attending the conference)	4					
Sponsor entire conference including breakfast buffet & luncheon buffet on both days. Speaking opportunities at opening and closing ceremonies.	•					
Sponsor one of the Diamond level events. (keynote speakers or equivalent, first come first serve)		•				
Sponsor one of the Platinum level events. (keynote speakers, tours, reception, wine, virtual app, first come first serve)			•			
Sponsor a breakout session (includes one pension and one benefits presentation)				•		
Sponsor a wellness break					•	
Reserved table(s) with preferred placement	•	•	•			
Exhibitor table	•	•	•			
Special acknowledgement prior to your sponsored event(s)	•	•	•	•	•	
Special signage at sponsored event.	•	•	•	•	•	
Recognition and logo on attendee brochure cover page	•					
Recognition in press releases and public relations initiatives	•					
Special thank you at opening and closing ceremonies.	•	•	•	•	•	•
Logo on conference website with link to sponsor's website.	•	•	•	•	•	•

CPBI Saskatchewan Region 2023 Regional Conference Sponsorship - Continued -

SPONSORSHIP DETAILS	Title	Diamond	Platinum	Gold	Silver	Bronze
Company logo in conference advertising, emails, brochures, and conference signage	•	•	•	•	•	•
Sponsor badge recognition for all your employees at the conference.	•	•	•	•	•	•
Opportunity to provide promotional items for the delegate bags.	•	•	•	•	•	•
Advance notice for selection at next year's conference.	•	•	•	•	•	•
Opportunity to put forth a volunteer (Conference planning volunteers attend the conference in full at no charge)	•	•	•	•	•	•
Opportunity to put forth a topic idea (to be reviewed by the Conference planning committee)	•	•	•	•	•	•
Level	Title	Diamond	Platinum	Gold	Silver	Bronze
Price of sponsorship level	\$10,000	\$4,500	\$3,500	\$2,500	\$1,500	\$500

Receive a 10% discount by applying for both Saskatchewan annual program and Conference Sponsorship by November 30, 2022!

CPBI Northern Alberta Region 2023 Annual Sponsorship

January - December 2023	Gold	Silver	Bronze
Credits to register and attend CPBI events/sessions ¹	25	15	5
Ability to introduce event/session speakers	included	N/A	N/A
Recognition at all events/sessions and on the CPBI website Northern Alberta section	Included	Included	Included
Sponsors' logo included on announcements, pre-event slideshows and sponsor sheets (logo size dependent on level).	Included	Included	Included
Ability to suggest topics and speakers to the CPBI Northern Alberta program committee.	Included	Included	Included
Ability to place promotional materials on the registration table and/or in the handouts section of the CPBI virtual platform.	Included	Included	N/A
Recognition on all CPBI Northern Region's Social Media posts	Included	Included	Included
Annual Investment ²	\$1000	\$750	\$500

- 1. Credits may be redeemed for events/sessions:
- Online events/sessions hosted by CPBI Northern Alberta: One hour = 1 credit; Virtual table = 3 credits
- In person events/sessions: Half-day = 5 credits; Lunch = 3 credits; Breakfast = 2 credits
- 2. Gold and Silver Levels capped at 10/year; unlimited Bronze sponsorships are available

CPBI Southern Alberta Region 2023 Annual Sponsorship

January - December 2023	Gold	Silver	Bronze	
Thank you credits to attend CPBI 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 2023 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.	Included	Included	Included	
Sponsors are encouraged to submit topic and speaker recommendations throughout the year.	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 introduce speaker(s) at a CPBI session within the 2023 program year.	Included	N/A	N/A	
Sponsorship Package ²	\$2,500	\$1,500	\$500	

Notes:

- 1. Credits may be redeemed for events:
 - Online events hosted by CPBI Southern Alberta: 1 hour webinar = 1 credit
 - In person events are calculated by length and cost of session, please reference the event webpage for # of credits per event.
- 2. We will accept up to 6 Gold, unlimited Silver and unlimited Bronze sponsorships.

CPBI Pacific Region 2023 Annual Sponsorship

January – December 2023	Gold	Silver	Bronze
 Credits to attend CPBI events: Online events hosted by CPBI Pacific: 1 hour webinar = 1 credit In-person events are calculated by length and cost of session, please reference the event webpage for # of credits per event. 	25 Credits 15 Credits		5 Credits
Sponsor to introduce speaker 1x in year.	Included	N/A	N/A
Sponsors may place promotional materials on the registration table and/or in the handouts section of our virtual platform.	Included	Included	N/A
Sponsors recognized and thanked at all educational events held in 2023 and on the Pacific section of the CPBI website.	Included	Included	Included
Sponsors' logo included on announcements, pre-event slide shows and sponsor sheets.	Included	Included	Included
Sponsors are encouraged to submit topic and speaker recommendations throughout the year.	Included	Included	Included
Sponsorship Package ¹	\$2,500	\$1,500	\$500
Additional Extra Add On – Sponsor to introduce speaker at a CPBI session within the 2023 program year. 2 Intro's for \$500.	1 Intro Included, 2 Intro's for \$500	2 Intro's for \$500	2 Intro's for \$500

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

Credits may be redeemed for events:

- Online events hosted by CPBI Pacific: 1 hour webinar = 1 credit
- In-person events are calculated by length and cost of session, please reference the event webpage for # of credits per event.



Summary of the 2023 National Partnership Program & Regional Sponsorships

NATIONAL	HYBRID FORUM (In-Person & Virtual) & Year-Round Visibility (Annual Program)	&
Diamond	\$35,000	
Platinum	\$27,500	
Gold	\$20,000	
Silver	\$12,500	
Bronze	\$7,500	

REGIONAL SPONSORSHIPS	Level	Level 1	Level 2	Level 3	Golf	Conference
Atlantic		\$2,500				\$1.5k to \$20k
Quebec		\$2,500	\$1,500	\$500		
Ontario	\$10,000	\$5,000	\$2,500	\$1,000		
Manitoba		\$1,500	\$1,000	\$500	\$800	
Saskatchewan		\$1,500				\$500 to \$10k
Northern Alberta		\$2,000	\$1,000	\$500		
Southern Alberta		\$2,500	\$1,500	\$500		
Pacific		\$2,500	\$1,500	\$500		