

GAIN TARGETED HIGH VALUE MARKETING EXPOSURE IN THE TRI-STATE REGION



Council of New Jersey Grantmakers

Investment Forum for Foundations and Endowments

November 7, 2018 • The Palace • Somerset, New Jersey



SPONSORSHIP OPPORTUNITIES
for
Asset Managers, Financial Services Providers
and Other Professional Advisors

SPONSORSHIP OPPORTUNITIES

If you are an asset manager, financial services provider or professional advisor seeking to broaden your reach among tri-state region philanthropies and endowed charities, you won't want to miss the Council of New Jersey Grantmakers' 2018 Investment Forum for Foundations and Endowments. This special, biennial event offers you the unique opportunity to link your expertise with senior executives and trustees who collectively oversee billions of dollars in assets and who are eager to gain insight into successful endowment management.

The Council is the Garden State's premier philanthropic association. Members include a broad spectrum of philanthropic entities, including leading family, independent, corporate and community foundations. CNJG's membership covers 80% of the assets of New Jersey's 50 largest foundations.*

As a sponsor, you can rely on the Council's track record, both as a proven convener of the philanthropic and non-profit communities in our state and a highly-regarded member of national philanthropy association networks, to ensure the Investment Forum will deliver a robust, exclusive audience of foundation and endowment representatives.

The 2018 Investment Forum features a day of plenary sessions, interactive workshops, and networking during which sponsors and attendees engage in a high-level exchange of topical and strategic investment intelligence. Sponsors can choose from an array of funding options and benefits that will enable you to effectively reach the Investment Forum's valued target audience. One of those benefits is exclusivity: to maintain a favorable ratio of sponsors to conference registrants, only 16 sponsor slots are available in support of the 2018 Investment Forum. In addition, each slot is associated with a pre-determined number of complimentary and for-purchase registrations; therefore, only sponsoring organizations will have the opportunity to "be in the room" with our special attendees.

For further information about sponsorship opportunities and benefits, please contact Theresa Jacks, CNJG Deputy Director, by phone at 609-341-2022 or by email at tjacks@cnjg.org.

* As per FC Stats: The Foundation Center's Statistical Information Service 2016

Previous Investment Forum Attendee Evaluation Comments:

"The entire conference was well-conceived and executed. Very informative."

"Well done...I would be interested in attending this again the next time it is offered."

"I met new colleagues who I look forward to staying in touch with."



Plenary or reception speaking and/or welcome opportunity

Session welcome opportunity

Session expert placement opportunity

Prominent placement of sponsor name/logo in all pre-event press releases, social media updates, marketing and advertising materials

Inclusion of sponsor name/logo in pre-event press releases, social media updates, marketing and advertising materials

Prominent placement of sponsor name on all event-day signage and materials

Inclusion of sponsor name on event-day signage and materials

Prominent placement of sponsor name in all post-event communications

Inclusion of sponsor name in post-event communications

One-time post-event sponsor marketing message emailed to all attendees by CNJG

Complimentary Program Ad

Complimentary Exhibit Space

Complimentary Registrations/Additional Ticket Purchase Option

**Subject to approval by vetting committee and availability



SIGNATURE INVESTOR \$12,000 Luncheon Plenary – Exclusive SOLD!	PARTNER \$10,000 Opening Plenary – Exclusive	HOST 3 @ \$7,500 each Breakfast, Closing Reception, Table Gift or Book – Exclusive	STRATEGIST \$6,500 Exclusive	EXPERT 8 @ \$5,500 each	ADVISOR 2 @ \$4,500 each
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Council of New Jersey Grantmakers
**Investment Forum
for Foundations
and Endowments**



Joshua Fenton, Director of Investments,
The Leona M. and Harry B. Helmsley
Charitable Trust, speaking at the 2016
Investment Forum

AGENDA

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|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8:30 – 9:15 a.m. | Registration and Networking Breakfast |
| 9:15 – 10:15 a.m. | Opening Plenary |
| 10:30 – 11:20 a.m. | Concurrent Break-Outs – Session 1 <ul style="list-style-type: none"> • <i>A Primer on Portfolio Construction</i> • <i>The Basics of Endowment Investing</i> • <i>The Art and Science of Selecting and Managing an Investment Consultant</i> • <i>Alternative Investing: What You Should Know About Hedge Funds</i> |
| 11:30 – 12:20 p.m. | Concurrent Break-Outs – Session 2 <ul style="list-style-type: none"> • <i>Best Practices for Rebalancing Your Portfolio's Asset Allocation</i> • <i>Setting a Spending Policy That Meets Your Endowment's Objectives</i> • <i>From Active to Passive Investing: The Evolution of ETFs</i> • <i>A Framework for Evaluating Your Endowment's Investment Risk</i> |
| 12:30 – 2:15 p.m. | Luncheon Plenary <ul style="list-style-type: none"> • <i>Market Outlook</i> |
| 2:30 – 3:20 p.m. | Concurrent Break-Outs – Session 3 <ul style="list-style-type: none"> • <i>Governing Your Corpus: From Policies to Practices</i> • <i>Understanding the Cost of Investments: Negotiating and Tracking Management Fees</i> • <i>Effective Approaches to Small Endowment Stewardship</i> • <i>The Role of Socially Responsible Investments in an Endowment Portfolio</i> |
| 3:30 p.m. | Closing Reception |

FOR MORE INFORMATION ON SPONSORSHIP OPPORTUNITIES:
Contact Theresa Jacks, CNJG Deputy Director, at 609-341-2022 or tjacks@cnjg.org.

About the Council of New Jersey Grantmakers

The Council of New Jersey Grantmakers (CNJG) is the center for philanthropy in New Jersey, serving the leading independent, corporate, family and community foundations as well as public grantmakers of our state. We support our 125+ members by strengthening their capacity to address New Jersey's and society's most difficult problems. We also access the resources of the philanthropic community – funding, expertise, leverage – to provide leadership on statewide issues. Past leadership efforts include a study of healthcare conversions and their philanthropic legacies, creating access to philanthropic dollars in underserved communities, and partnering with the State to pilot a highly-regarded national model that addresses crime prevention through youth development. In addition, the Council facilitated the landmark study, *Facing Our Future*, which outlined the fiscal crisis facing all levels of New Jersey government.