



tisa

Leading on Investments and Savings

TISA Annual Conference 2018

Social change: impacting financial services for the better

Tuesday 20th November

etc. venues, 200 Aldersgate, St Paul's, London, EC1A 4HD

Sponsorship Opportunities



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#TISAConf2018

April 2018



TISA Annual Conference 2018

The annual conference is the flagship event in TISA's calendar and an ever-popular event across the financial services industry. More than 300 senior industry executives and influencers attended last year's conference.

TISA's 2018 Conference theme will put the focus on the economic issues and the opportunities today's richly diverse society offers UK financial services. In the year that marks the centenary of women's suffrage, our conference programme will:

- Examine the impact of government policy on the financial wellbeing of women;
- Explore the business opportunities a diverse population presents;
- Consider the state of the nation's savings and the needs of vulnerable customers;
- Put the spotlight on the gender pay gap and impact on the levels of personal savings;
- Look to the future for the UK and global markets and the prospects for enhancing the financial wellbeing of all UK citizens post-Brexit.

Our conference Chair is the renowned writer and broadcaster Louise Cooper. A respected contributor on business economics and finance, Louise regularly presents the BBC's Wake Up To Money and Money Box Live. Confirmed speakers to date are:

- Anjalika Bardalai, Chief Economist and Head of Research, TheCityUK
- Elissa Bayer, Senior Investment Director, Investec
- John Glen (Economic Secretary to the Treasury and City Minister)
- Mark Littlewood, Director General of the Institute of Economic Affairs

Following its successful introduction last year, we will be hosting the TISA Information Zone again in 2018. This popular free one-hour session before lunch extends the programme for the day allowing more time for exhibitors and sponsors to meet with delegates.

Sponsorship of this year's conference provides your organisation with an excellent opportunity to get 'front of mind' with our influential delegates and speakers, and to demonstrate your support for TISA. Our exciting range of sponsorship and exhibition options are outlined below, and we look forward to discussing these in more detail with you.

TISA's Annual Conference is taking place on Tuesday 20th November 2018 at etc. venues, 200 Aldersgate, St Paul's, London, EC1A 4HD. Located near St. Paul's Cathedral and The Barbican, 200 Aldersgate is a state of the art conference centre offering a modern and versatile event space ideal for conferences with exhibitors, and networking.



TISA Annual Conference 2018: Sponsorship Opportunities

Lead sponsorship package

Sponsorship rate - £11,500 ex VAT.

Lead sponsorship at the TISA conference is an ideal opportunity for your company to emphasise your influence and support for the financial services sector.

Pre-conference marketing

- TISA social media: announcement to confirm your lead sponsorship
- TISA website: acknowledgement as a lead conference sponsor on TISA conference micro-site with a hyperlink to your company homepage
- Delegate registration e-brochure: your company logo on front cover and the opportunity to include a 250-word company profile

At the conference

Branding opportunities

- Acknowledgement as a lead sponsor on video wall at main entrance to venue
- Acknowledgement as a lead sponsor on all event signage
- Company logo displayed in the main hall
- Company logo on all event documentation
- Hyperlink from TISA conference micro-site to your company homepage
- TISA social media acknowledgement of your sponsorship support

Delegate pack

- Acknowledgement as a lead sponsor on the cover of the delegate brochure
- Opportunity to include 250-word company profile within delegate brochure
- Welcome letter (pre-agreed words) from your company within delegate pack
- Opportunity to include company literature within delegate pack

Exhibition space

- Exhibition space (approx. 12ft x 7ft) in a prominent position including a table for marketing materials, power supply and Wi-Fi

Post-conference follow up

- Additional pre-agreed mailing to all attendees and TISA members after the event, undertaken by TISA on your behalf
- Acknowledgement of sponsorship in TISA conference review

Additional benefits

- 5 Complimentary places for your company representatives with the opportunity to book delegates/guests at members' rate, subject to capacity
- Option to discuss other branding suggestions with TISA engagement team prior to event.



TISA Annual Conference 2018: Sponsorship Opportunities

FinTech Exhibition Zone sponsorship package

Sponsorship rate - £6,000 ex VAT.

The FinTech Zone was introduced to the TISA Annual Conference in 2016 and proved to be a great success. The sponsor will work with TISA to select a range of FinTech specialists – who will not be required to pay any additional fee - who will be able to demonstrate their expertise in this vital part of the future of financial services. The Fin Tech Zone will be sited in a prominent area within the conference venue and the sponsor will be seen as a major supporter of this exciting development in the future of our industry.

Pre-conference marketing

- TISA social media: announcement to confirm your sponsorship support for the conference
- Acknowledgement as a sponsor within the delegate registration e-brochure
- Hyperlink from TISA website conference micro-site to your company homepage

At the conference

Branding opportunities

- Acknowledgement of your sponsorship
- Company logo on all event documentation
- Hyperlink from TISA website conference micro-site to your company homepage

Delegate pack

- Acknowledgement as a sponsor within the delegate brochure
- Opportunity to include 250-word company profile within delegate brochure
- Welcome letter (pre-agreed words) from your company within delegate pack
- Opportunity to include company literature within delegate pack

Exhibition space

- Exhibition space (approx. 7ft x 7ft) including a table for marketing materials, power supply, Wi-Fi

Post-conference follow up

- Additional pre-agreed mailing to all attendees and TISA members after the event, undertaken by TISA on your behalf
- Acknowledgement of sponsorship in TISA conference review

Additional benefits

- 3 Complimentary places for your company representatives with the opportunity to book delegates/guests at members' rate, subject to capacity
- Option to discuss other branding suggestions with TISA engagement team prior to event



Refreshment sponsorship packages

Lunch Sponsor - rate £5,750ex. VAT

Drinks Reception Sponsor - rate £5,250 ex. VAT

Interval Refreshments Sponsor - rate £5,000 ex. VAT

Networking opportunities are one of the key components of a successful conference and in addition to the benefits highlighted below sponsorship of a social aspect of the conference allows you the freedom to provide branded items such as aprons and napkins, subject to prior agreement with TISA.

Pre-conference marketing

- TISA social media: announcement to confirm your sponsorship support for the conference
- Acknowledgement as a sponsor within the delegate registration e-brochure
- Hyperlink from TISA website conference micro-site to your company homepage

At the conference

Branding opportunities

- Acknowledgement of your sponsorship
- Company logo on all event documentation
- Hyperlink from TISA website conference micro-site to your company homepage

Delegate pack

- Acknowledgement as a sponsor within the delegate brochure
- Opportunity to include 250-word company profile within delegate brochure
- Welcome letter (pre-agreed words) from your company within delegate pack
- Opportunity to include company literature within delegate pack

Exhibition space

- Exhibition space (approx. 7ft x 7ft) including a table for marketing materials, power supply, Wi-Fi

Post-conference follow up

- Additional pre-agreed mailing to all attendees and TISA members after the event, undertaken by TISA on your behalf
- Acknowledgement of sponsorship in TISA conference review

Additional benefits

- 3 Complimentary places for your company representatives with the opportunity to book delegates/guests at members' rate, subject to capacity
- Option to discuss other branding suggestions with TISA engagement team prior to event.



TISA Annual Conference 2018: Sponsorship Opportunities

Exhibitor Sponsorship - rate £3,500 ex VAT.

With membership and attendees from across the financial services spectrum, exhibiting at the TISA conference allows you access to firms and individuals from areas of the industry you may not ordinarily encounter. Past exhibitors have commented that this is a great benefit and the reason that many firms return to exhibit year after year.

The benefits of exhibiting at the TISA conference include:

Exhibition space

- Exhibition space (approx. 7ft x 7ft) including a table for marketing materials, power supply and Wi-Fi
- 2 Complimentary places for your company representatives
- The opportunity to book delegates/guests at members' rate, subject to capacity

Branding opportunities

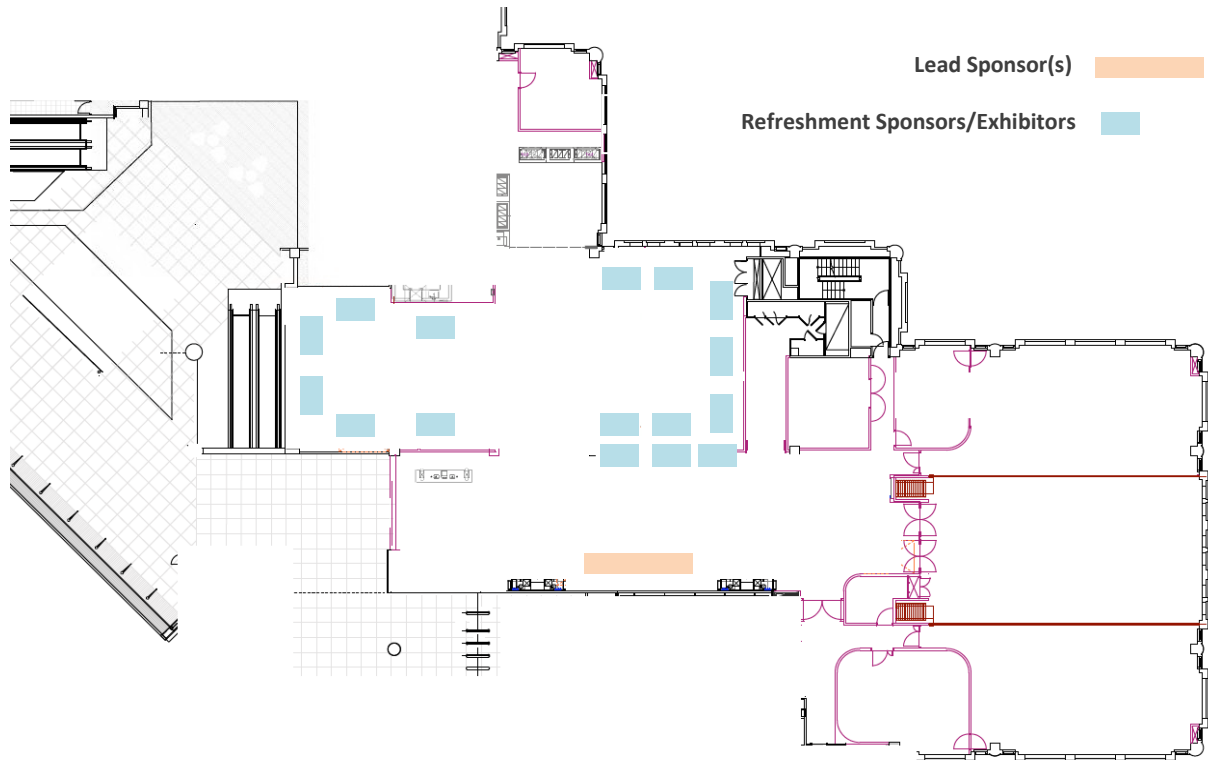
- Company logo appearing on all event documentation
- Hyperlink from TISA website conference micro-site to your company homepage
- Acknowledgement as an exhibitor within conference delegate brochure
- Opportunity to include 100-word company profile within conference delegate brochure
- Opportunity to include a welcome letter (pre-agreed words) from your company within delegate pack
- Opportunity to include company literature within delegate pack

Post-conference follow up

- Additional pre-agreed mailing to all attendees and TISA members after the event, undertaken by TISA on your behalf
- Acknowledgement of sponsorship in TISA conference review.

About the venue

TISA has exclusive use of the Premium Suite (conference room), Galleria, and Dining areas within the North Wing offering premium exhibition space for all our sponsorship categories. The full venue floorplan is available online [here](#). Get a feel for the venue by taking a 360° virtual tour of both the entrance hall and the exhibition area [here](#). Find out more about the venue [here](#) and at www.etcvenues.co.uk/venues/stpauls.



2017 Sponsors

Main Sponsor

DST Systems

Lunch Sponsor

Aberdeen Standard Investments

Refreshments Sponsor

Duff & Phelps

Lanyard Sponsor

LexisNexis Risk Solutions

Exhibitors

Altus

FCA

AutoRek

Investment 2020

Calastone

KickStart Money

Euroclear

Origo

Experian

2017 Speakers & Conference Programme

Last year's Conference Chair was Richard Romer-Lee, MD, Square Mile Investment Consulting and Research. Our speaker line-up included:

- **Rt Hon Sir Vince Cable MP**, Leader of the Liberal Democrats
- **Rt Hon Nicky Morgan MP**, Chair of the Treasury Select Committee
- **Rupert Harrison**, PhD, Managing Director Blackrock
- **Jonathan Bamford**, Head of Parliamentary & Government Affairs, Information Commissioners Office
- **Pru Ashby**, Head of North America, London & Partners
- **Rupert Pybus**, Global Head of Marketing, Columbia Threadneedle Investments & **Jane Goodland**, Responsible Business Director, Old Mutual Wealth
- **Adrian Boulding**, Director of Retirement, TISA and **Bill Robinson**, Senior Adviser, KPMG
- **Tom McPhail**, Hargreaves Lansdown

Brexit Panel Session

- **John Rowland**, Executive Director at Cicero - Chair
- **Oliver Wright**, Public Policy Editor of The Times
- **Barney Reynolds**, Partner at Shearman & Sterling

TISA Information Zone

Session 1: Technical Update

Our Technical Policy Director Jeffrey Mushens provided the latest on regulations impacting UK financial services, including MiFID II, Client Assets, SM&CR and GDPR.

Session 2: Savings Update

Renny Biggins, Pensions Technical Officer, showcase our expertise in the savings and retirement space on complex areas like traversing the age 75 watershed with multiple pensions and the expanding ISA universe.

Session 3: Digital Update

Delegates heard the latest on TISA's Digital Identity pilot and how the Code of Conduct in Data Handling will apply. In addition, we announced new initiatives the TISA FinTech Forum and a MiFID II project to deliver a common, digital solution to the requirements regarding the collection and distribution of investment fees, charges and target market information.