

## 2010 Sponsorship Invitation

We are pleased to invite you to join us as a sponsor of the 2010 SRI in the Rockies Conference. Come join us in the Exhibit Hall at our 21st annual conference!

SRI in the Rockies is the premier annual gathering of the sustainable and responsible (SRI) investment industry in North America. This conference showcases leaders in the investment industry, businesses striving to be good corporate citizens, and organizations working to direct the flow of investment capital to those underserved by traditional lending institutions.

Sponsorship is an excellent way to introduce new services and place new products in front of hundreds of SRI practitioners, from diverse corners of the industry. From industry veterans to new players, all sponsors enjoy unparalleled networking opportunities and face time with conference attendees.



SRI in the Rockies sponsors receive high value return on their sponsorship dollars. The SRI industry is changing rapidly. For new and old players alike, SRI in the Rockies is the most prudent, efficient, and effective way to make your organization known to SRI practitioners.

Now, more than ever, is the time to join and support this innovative, cutting edge industry as we continue to create the “change we want to see.”

**Three levels of sponsorship provide flexibility** for your budget and your organization’s unique needs; all with great exposure to ensure high value return on your sponsorship dollars. Your brand will be presented in a number of ways: exhibit space, print ad, logo slideshow during conference meals, representation on the SRI in the Rockies website, and much more.

On behalf of First Affirmative Financial Network, we thank you for giving serious consideration to supporting the 21st annual SRI in the Rockies Conference. We look forward to speaking with you, and answering your questions.

And, we hope to see you in San Antonio in November!

Sincerely, your hosts,



George R. Gay, CEO  
First Affirmative Financial Network, LLC



Steven J. Schueth, President  
First Affirmative Financial Network, LLC

*Questions? Contact Conference Coordinator Krystala Kalil at 888.774.2663 / [Krystala@SRIintheRockies.com](mailto:Krystala@SRIintheRockies.com)*



## 2010 Sponsorship Facts At-A-Glance

**When?** November 18–21, 2010

**Where?** JW Marriott Hill Country Resort & Spa, San Antonio, Texas (<http://www.jwsanantonio.com/>)

**Who Attends?** We are expecting 650+ SRI practitioners to join us this year. It is conservatively estimated that conference participants have influence over investment portfolios worth more than \$1 trillion. They represent:

- ✓ Licensed Investment Professionals
- ✓ SRI Mutual Fund Companies
- ✓ Asset Managers
- ✓ Community Development Banks
- ✓ Social Research Organizations
- ✓ Faith-based Organizations
- ✓ Non-Profit Organizations
- ✓ Others Groups Working with the SRI Community on Social Change Initiatives

### Why Sponsor?

- ✓ Visibility and Exposure to National and Global SRI Industry Leaders
- ✓ Create and Nurture New Business Partnerships
- ✓ Networking for Cutting Edge Thought and Action
- ✓ An Opportunity to Introduce and Market Products and Services to SRI Practitioners
- ✓ Accelerate Knowledge and Expertise for Organizations New to the SRI Space
- ✓ Fertile Ground for the Development of Innovative Products and Services, Partnerships and Collaborations

### Sponsor Benefits?

- ✓ Three Levels of Sponsorship: Benefactor, Meal/Event, General
- ✓ Exhibit Space in the SRI in the Rockies Exhibit Hall
- ✓ One to Three Conference Registrations, including Meals, depending on Sponsorship Level
- ✓ Print Ad in Conference Notebook
- ✓ Four Minute Meal Presentation for Meal/Event Sponsors
- ✓ Presence on SRI in the Rockies Website
- ✓ Opportunity to Purchase 30-Minute Sponsored Presentation Slot
- ✓ Access to Conference Roster Prior to the Conference

SPONSORSHIPS			DEADLINES
Type	Cost	By March 31	
Benefactors	\$17,500	\$16,000	<b>March 31:</b> Early Discount Expires
Meal/Event Sponsorships	\$6,900–\$8,500	\$6,500–\$7,900	<b>March 31:</b> 50% of Payment Due
General	\$4,950	\$4,700	<b>July 15:</b> Payment Due in Full
30-Min Presentation	+\$3,500	+\$3,250	<i>See 2010 Sponsorship Opportunities for details.</i>

## 2010 Sponsorship Opportunities Overview

**General Sponsorships: \$4,950**

**Early Discount through March 31, 2010: \$4,700**

General Sponsors of the 2010 SRI in the Rockies Conference will enjoy the following benefits:

- ✓ One full conference registration, including eight meals, receptions, taxes and gratuities for one person (*Benefactors receive three full registrations.*)
- ✓ One quarter-page black & white ad in the Conference Notebook (*Benefactors receive a full-page color ad.*)
- ✓ Access to the conference registration list in advance of the conference, and thereafter, upon request
- ✓ A six-foot display table draped and skirted (*Benefactors receive a larger and more prominent display space.*)
- ✓ Logo with brief description of your organization on the conference website with a link to your website
- ✓ Inclusion in a looped PowerPoint presentation of sponsor logos projected continuously during meals
- ✓ Distribution of product/service information to First Affirmative affiliated advisors throughout the year

Sponsor exhibits will be positioned “in the flow” of conference traffic. In addition to our annual Exhibitor Fair on Friday night (November 19, 2010), we will be positioning breaks in the exhibit spaces, providing sponsors with as much participant traffic flow as possible throughout our time together in San Antonio.

### Conference Notebook: Advertising Upgrades

Sponsors may upgrade to a full-page black & white ad for an additional **\$535** or to a half-page black & white ad for an additional **\$295**. The Conference Notebook will be spiral bound and will include the conference agenda, plenary speaker photos and bios, and the list of conference participants, with sponsor ads interspersed throughout.

Benefactor ads will receive priority placement. Other conference sponsor ads will be placed on a first-come, first-served basis—so don't be late with your submission! Ad specifications and submission details will be provided upon receipt of your sponsorship commitment.

**Sponsor Presentations: \$3,500**

**Early Discount through March 31, 2010: \$3,250**

Twenty 30-minute presentation time slots are available to sponsoring organizations. Benefactors, Meal/Event Sponsors, and General Sponsors may purchase a Sponsor Presentation. Sponsor Presentations will be scheduled in as non-duplicative a manner as possible.

**The cost of a 30-minute Sponsor Presentation is an add-on to the price of a General Sponsorship, or a Meal/Event Sponsorship.**

*One 30-minute Sponsor Presentation time slot is automatically included as a benefit for Benefactors.*

**QUESTIONS? Contact Conference Coordinator Krystala Kalil at 888.774.2663 / [Krystala@SRIintheRockies.com](mailto:Krystala@SRIintheRockies.com)**

## Meal / Event Sponsors

**Early Discount: March 31**

Meal/Event Sponsors will receive all of the General Sponsorship benefits described above PLUS additional benefits (see the Notes below for more details). Previous sponsors have the right of first refusal on the Meal or Event that they sponsored the past year.

MEAL / EVENT	DATE	SPONSOR FEE	SPONSOR	EARLY DISCOUNT
Opening Reception*	Nov. 18	\$17,500	AVAILABLE	\$16,000
Dinner*	Nov. 18	\$17,500	ECD/Hope Community Credit Union	\$16,000
Ice Cream Social*	Nov. 18	\$17,500	Pax World Management LLC	\$16,000
Breakfast	Nov. 19	\$6,900	Milberg LLP	\$6,500
Morning Break	Nov. 19	\$6,900	Moxy Vote	\$6,500
Lunch	Nov. 19	\$6,900	Self Help Credit Union	\$6,500
Afternoon Break	Nov. 19	\$6,900	AVAILABLE	\$6,500
Dinner*	Nov. 19	\$17,500	RiskMetrics Group	\$16,000
Breakfast	Nov. 20	\$6,900	AVAILABLE	\$6,500
Morning Break	Nov. 20	\$6,900	AVAILABLE	\$6,500
Lunch	Nov. 20	\$6,900	AVAILABLE	\$6,500
Afternoon Break	Nov. 20	\$6,900	AVAILABLE	\$6,500
Dinner*	Nov. 20	\$17,500	Calvert	\$16,000
Celebration/Dance*	Nov. 20	\$17,500	Sustainalytics	\$16,000
Brunch	Nov. 20	\$8,500	Calvert Foundation	\$7,900
Recycling		\$8,500	AVAILABLE	\$7,900
Cyber Stations		\$8,500	ShoreBank	\$7,900
Appreciation Gifts		\$8,500	AVAILABLE	\$7,900
Carbon Offsets		\$8,500	Trillium Asset Management	\$7,900
Computers		\$6,900	Dell (plus loan of 15 laptop computers)	\$6,500
Photography		\$8,500	AVAILABLE	\$7,900

\* Certain Meal / Event Sponsorships are generally reserved for Benefactor Level Sponsors.

### Meal / Event Sponsorship Notes:

The following sponsors may present for **up to four minutes** at the meals designated below:

- **Breakfast Sponsors** , Morning and Afternoon **Break Sponsors** will have the opportunity to speak after lunch the day they sponsor.
- **Lunch Sponsors** will have the opportunity to speak near the end of their lunch.
- **Dinner Sponsors** will have an opportunity to speak near the end of their dinner.
- Our **Brunch Sponsor** will have an opportunity to speak after dinner the prior evening.

- **Opening Reception, Recycling, Cyber Station, and Carbon Offset Sponsors** will each have an opportunity to speak near the end of a dinner during the conference.
- Our **Appreciation Gifts Sponsor** will have an opportunity to speak after a dinner. This sponsorship enables us to provide high-quality appreciation gifts to Speakers, Agenda Committee members, Directors of the Social Investment Forum, and Conference Staff. The sponsor's logo and company story are included in the information that accompanies the appreciation gift.
- Our **Photography Sponsor** will have an opportunity to speak during a lunch. This sponsor will be recognized for underwriting the professional photographs taken throughout the conference. The sponsor's logo will be prominently featured on the video montage shown prior to the Celebration/Dance, as well as on the website photos highlighting the 2010 conference.

Please remember that each of the above speaking opportunities is for **up to FOUR MINUTES**.

In addition to the sponsorship fee identified above, our **Computer Sponsor** will provide fifteen laptop computers for use during the conference. The Computer Sponsor's logo will be projected on screen at the beginning of every session where a PowerPoint presentation is used. The computer sponsorship benefit package **does not include an opportunity to speak**.

**Benefactors: \$17,500**

**Early Discount through March 31, 2010: \$16,000**

**Benefactors are our most valued allies and supporters.** Bloomberg, Calvert, Dell, Pax World Funds, and the Social Investment Forum supported the conference at the Benefactor level in 2009. First Affirmative is recognized as a Benefactor due to the incredible amount of time and effort it contributes toward organizing the conference.

**Benefactor level sponsors will receive all of the General Sponsorship benefits described above PLUS:**

- ✓ Three conference registrations (3 individual participants, including 8 meals, receptions, events, taxes and gratuities)
- ✓ Meal/Event sponsorship with up to **four minutes** to speak to everyone assembled for a meal
- ✓ One 30-minute Sponsor Presentation time slot
- ✓ A full-page color ad in the Conference Notebook
- ✓ Banner ad on conference website
- ✓ Premium exhibit space—larger, more prominent display space than lower level sponsors

## **Deadlines:**

- ✓ **March 31, 2010**      Early Discount Deadline: 50% of Sponsorship Payment Due
- ✓ **July 15, 2010**      Sponsorship Payment Due in Full

**QUESTIONS? Contact Conference Coordinator Krystala Kalil at 888.774.2663 / [Krystala@SRIntheRockies.com](mailto:Krystala@SRIntheRockies.com)**



## 2010 Sponsor Registration Form

21st Annual SRI in the Rockies Conference  
 JW Marriott Hill Country Resort & Spa • November 18–21, 2010

Please see the preceding descriptions of sponsorship levels and benefits.

<b>Sponsorship Level</b>	We would be proud to be a Conference Benefactor	\$ _____
	We want to sponsor a Meal / Event: _____	\$ _____
	We want to support the conference as a General Sponsor	\$ _____
	We want to reserve a 30-Minute Sponsor Presentation Breakout time slot	\$ _____
<b>Ad Upgrade</b>	We want to upgrade to a Full-Page black & white ad (+\$535)	\$ _____
	We want to upgrade to a 1/2-Page black & white ad (+\$295)	\$ _____
<b>Payment</b>	<b>Total Amount Due</b>	= \$ _____
	<b>Amount Enclosed</b>	= \$ _____

### Instruction

Payment of at least 50% of sponsorship fee is required with submission of this form.

**Mail this form along with your check payable to SRI in the Rockies to:**

SRI in the Rockies, 5475 Mark Dabling Boulevard, Suite 108, Colorado Springs, Colorado 80918

**Send overnight packages to** the above address. Use 719.636.1045 as the telephone number.

To pay by credit card call 888.774.2663.

**Fax to:** 719.636.1943

### Deadlines

Early Discount Deadline: **March 31, 2010**

50% of Sponsorship Payment Due: **March 31, 2010**

Full Sponsorship Payment Due: **July 15, 2010**

### Organization Information

Attach business card and complete fields that differ from your card.

Organization: \_\_\_\_\_

**Administrative Contact:** \_\_\_\_\_

**Attending the Conference?** \_\_\_\_\_

Street Address: \_\_\_\_\_

City, State & Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

*If attending, special dietary needs (e.g., vegan; dairy intolerant):* \_\_\_\_\_

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## 2010 Sponsor Participant Registration

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Please provide contact information for **EVERY PERSON** attending the conference from your organization—including the Administrative Contact, if applicable. **PLEASE PROVIDE ALL OF THE INFORMATION REQUESTED BELOW, EVEN IF YOU THINK WE ALREADY HAVE IT.** If you prefer, you are welcome to attach a business card for each attendee. Please copy this form as needed for additional attendees. Thank you!

<b>Sponsor Attendee</b>	Name:	Badge Name (if different):
	Company:	Title:
	Street Address:	
	City, State & Zip:	
	Telephone:	E-mail:
	<input type="checkbox"/> Please do not publish this contact information in the conference attendee list.	
	<a href="#">Special dietary needs (e.g., vegan; dairy intolerant):</a>	

<b>Sponsor Attendee</b>	Name:	Badge Name (if different):
	Company:	Title:
	Street Address:	
	City, State & Zip:	
	Telephone:	E-mail:
	<input type="checkbox"/> Please do not publish this contact information in the conference attendee list.	
	<a href="#">Special dietary needs (e.g., vegan; dairy intolerant):</a>	

<b>Sponsor Attendee</b>	Name:	Badge Name (if different):
	Company:	Title:
	Street Address:	
	City, State & Zip:	
	Telephone:	E-mail:
	<input type="checkbox"/> Please do not publish this contact information in the conference attendee list.	
	<a href="#">Special dietary needs (e.g., vegan; dairy intolerant):</a>	

<b>Sponsor Attendee</b>	Name:	Badge Name (if different):
	Company:	Title:
	Street Address:	
	City, State & Zip:	
	Telephone:	E-mail:
	<input type="checkbox"/> Please do not publish this contact information in the conference attendee list.	
	<a href="#">Special dietary needs (e.g., vegan; dairy intolerant):</a>	

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