



**CFA Society  
New Mexico**

## 2018 SPONSORSHIP OPPORTUNITIES



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**CFA Society  
New Mexico**

### **KEY BENEFITS OF SPONSORING CFA SOCIETY NEW MEXICO**

- Exposure at the CFA Society New Mexico's most prominent events
- Networking opportunities
- Sponsor names are prominently displayed throughout events
- Promotion of your goods and services to top executives and investment industry professionals

### **AVAILABLE SPONSORSHIP OPPORTUNITIES**

- 19<sup>th</sup> Annual Economic Forecast Dinner - February 8<sup>th</sup>, 2018

**CFA Society New Mexico events hosted throughout the year provide excellent marketing opportunities for your company. Our events focus on bringing knowledge to professionals in the investment community. They are also a time to connect and build relationships with professionals throughout the region.**

### **Why Sponsor the CFA Society New Mexico?**

The CFA Society New Mexico provides sponsorship opportunities to organizations and companies who support our mission to promote the highest professional and ethical standards for local CFA Charterholders as well as within the investment industry.

Your sponsorship promotes your company as a community leader who embodies the same values and ethics as the CFA Institute.

Attendees of CFA Society New Mexico events hold positions across the financial industry, as well as in other related industries, providing you with excellent marketing, networking, and brand recognition opportunities.

Your investment is also a contribution to the continued educational and professional development of investment professionals in our community.

Your support is greatly appreciated.

For Sponsorship Opportunities please contact Sonny Gokhale, CFA  
505.847.6389 or at [sonny@ironoakcapital.com](mailto:sonny@ironoakcapital.com)



## About CFA Society New Mexico

The CFA Society New Mexico is a statewide organization of investment management and research professionals. Founded in 1998, it is the local chapter of the CFA Institute, a global organization representing the views of investment professionals before standard setters, regulatory authorities and legislative bodies around the world. The purpose of the CFA Society New Mexico is to advance the development of the investment profession and to improve the visibility of the members by supporting professional development and advocating for the New Mexico investing community.

### Key Membership Facts:

- Over 95 Members in New Mexico
- Majority of members have 15+ years of industry experience
- 89% of local members are CFA charterholders
- 30% of members are Portfolio Managers
- 18% Female / 82% Male

## Why the CFA Designation Is Important

The CFA credential is a highly respected and globally recognized investment designation providing a strong foundation of portfolio management and investment analysis skills to its Charterholders. The curriculum of the program provides candidates with practical knowledge, portfolio management expertise, and real-world analysis skills. This strong foundation of knowledge coupled with dedication to the highest ethical and professional standards helps to ensure those with a CFA designation demonstrate professional excellence.

## The CFA Program

The CFA program is a three-year study program with three levels of examination. The exams are offered only once or twice a year and are six hours long. In order to obtain the CFA designation, an investment professional must pass each of the three exams and have a minimum of four years of investment industry experience. Candidates and Charterholders must also adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct.

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# CFA Society New Mexico

## 19<sup>th</sup> ANNUAL ECONOMIC FORECAST DINNER

Thursday, February 8<sup>th</sup>, 2018    Albuquerque, NM    Hotel Albuquerque

Expected Attendance: 150-200 people

Please join CFA Society New Mexico as we celebrate our 19<sup>th</sup> Annual Economic Forecast Dinner. This elegant dinner event brings together New Mexico's local leaders and professionals to listen to top speakers share ideas and information.

### KEYNOTE SPEAKER: Laird R. Landmann

Group Managing Director, Co-Director Fixed Income at TCW Group



Mr. Landmann is a Generalist Portfolio Manager in the U.S. Fixed Income Group. He joined TCW in 2009 during the acquisition of Metropolitan West Asset Management LLC (MetWest). Mr. Landmann currently serves on the boards of the TCW and Metropolitan West Mutual Funds. Mr. Landmann currently co-manages many of TCW and MetWest's mutual funds, including the MetWest Total Return Bond Fund, the MetWest High Yield Bond Fund and the TCW Core Fixed Income Fund, and leads the fixed income group's risk management efforts. He is a leader of the MetWest investment team that was recognized as Morningstar's Fixed Income

Manager of the Year for 2005 and has been nominated for the award eight times.

Prior to founding MetWest in 1996, Mr. Landmann was a principal and the co-director of fixed income at Hotchkis and Wiley. He also served as a portfolio manager and vice president at PIMCO. Mr. Landmann holds an AB in Economics from Dartmouth College and an MBA from the University of Chicago Booth School of Business.

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# CFA Society New Mexico

## 2018 ECONOMIC FORECAST DINNER SPONSORSHIP OPPORTUNITIES

	GOLD	SILVER	BRONZE
Commitment	\$1,800	\$1,300	\$1,000
Number of Sponsorships Available at Each Level	2	3	4
<b>SPONSORSHIP BENEFITS</b>			
Economic Forecast Dinner Seating	Table of 8 Prime Location	Table of 8 Priority Location	8
Sponsor Logo and Link on CFANM Homepage	★	★	Name only
Sponsor Logo in CFANM Forecast Dinner Emails	★	Name only	Name only
Sponsor Logo on Signage on Display during Event	★	★	Name only
Sponsor Recognition in Symposium Program (Logo/Name)	LOGO	LOGO	Name only
Sponsor Logo displayed on Screens during Social Hour Before Registration	★	★	
Sponsor's Literature Available at Registration Table	★		
Opportunity to Provide Promotional Items	★		
Support of Travel Funding for Local Candidates*	★	★	★

### Additional Sponsorship Opportunities:

Wine Sponsor     \$500  
Table of 8         \$500

*\*Since the 2017 loss of the Albuquerque CFA Program Exam Center, CFA Society New Mexico has been proud to help assist our 40+ local candidates with their now increased travel costs. A portion of all our event sponsorships will go to this program.*

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# CFA Society New Mexico

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# CFA Society New Mexico

## 2018 SPONSORSHIP AGREEMENT

### ECONOMIC FORECAST DINNER

- |                          |              |        |
|--------------------------|--------------|--------|
| <input type="checkbox"/> | GOLD         | \$1800 |
| <input type="checkbox"/> | SILVER       | \$1300 |
| <input type="checkbox"/> | BRONZE       | \$1000 |
| <input type="checkbox"/> | WINE SPONSOR | \$500  |
| <input type="checkbox"/> | TABLE of 8   | \$500  |

#### PAYMENT INFORMATION

- CREDIT CARD (we will contact you for credit card payment processing)
- CHECK INCLUDED
- INVOICE REQUESTED

#### Please remit payments to:

**CFA Society New Mexico**  
**P.O. BOX 36947**  
**Albuquerque, NM 87176-6947**

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Primary Sponsor Contact Name

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Organization Name and Website (as you wish it to appear in publicity)

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Mailing Address

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Primary Phone

Primary Email

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Authorized Signature

Date

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