

Second Annual Forecast Dinner

Sponsorship Opportunities

February 6, 2008

Portland Art Museum
Kridel Grand Ballroom

5:30 pm Cocktail Hour
6:30 pm Dinner & Speaker Presentation

Featuring:



James W. Paulsen, Ph.D.
Wells Capital Management



Andrew Barker
Julius Baer Investment Management

CFA SOCIETY OF
PORTLAND

PO Box 434
Portland, OR
97207-0434

info@cfaportland.org
www.cfaportland.org



Sponsorship Packages

PRESENTING – \$8,000

There will be only one Presenting Sponsor. Sponsorship at this level includes:

- Recognition as Presenting Sponsor
- Opening remarks by representative of your choice
- Corporate logo in promotional newspaper ads before and after event and on the CFA Society of Portland website
- One-page insert in program (please provide to CFASP)
- Corporate logo recognition at your tables and at the registration table
- Corporate logo recognition via projection during cocktail hour and dinner
- Permission to distribute promotional materials at all tables
- Invitation to the VIP cocktail reception with the keynote speakers for 24 attendees
- Three sponsor tables at dinner (24 tickets) with preferred seating

GOLD – \$4,000

Sponsorship at this level includes:

- Recognition as a Gold Sponsor
- Name recognition in opening remarks
- Corporate logo in promotional newspaper ads before and after event and on the CFA Society of Portland website
- Half-page insert in program (please provide to CFASP)
- Corporate logo recognition at your tables and at the registration table
- Corporate logo recognition via projection during cocktail hour and dinner
- Invitation to the VIP cocktail reception with the keynote speakers for 16 attendees
- Two sponsor tables at dinner (16 tickets) with preferred seating

SILVER – \$2,500

Sponsorship at this level includes:

- Recognition as a Silver Sponsor
- Name recognition in promotional newspaper ads before and after event and on the CFA Society of Portland website
- Corporate logo recognition in program
- Corporate logo recognition at your table
- Name recognition via projection during cocktail hour and dinner
- Invitation to the VIP cocktail reception with the keynote speakers for 8 attendees
- One sponsor table at dinner (8 tickets) with preferred seating

TABLE—\$750

This level includes:

- Name recognition at your table
- One sponsor table at dinner (8 tickets) with preferred seating



CFA Society of Portland

Our society is an association of local investment professionals. Consisting of portfolio managers, security analysts, investment advisors, and other financial professionals, we:

- promote ethical and professional standards within the investment industry;
- encourage professional development through the CFA Program and continuing education;
- facilitate the exchange of information and opinions among people within the local investment community and beyond; and
- work to further the public's understanding of the CFA designation and investment industry.

As one of many CFA Institute member societies, our society connects members to a global network of investment professionals.

The Portland Society and the Community

An integral part of the local financial community, the CFA Society of Portland (CFASP) is committed to helping the next generation of investment professionals. We support local students with scholarships, hands-on investment practice and industry connections to develop tomorrow's investment professionals. The CFASP partners with Portland State University to allow MBA and senior-level finance students to manage the CFASP's investment portfolio, which is nearing \$200,000. We also provide Wall Street Journal subscriptions to high school libraries in the Portland Public Schools system. In addition, many society members volunteer their time serving on the boards of pension funds, endowments, charitable organizations and corporations to help them meet their fiduciary obligations to retirees and beneficiaries. Your support of the CFASP and the Second Annual Forecast Dinner helps us to better serve our community.



Last year's Forecast Dinner was a huge success, with over 200 attendees.

CFA Society of Portland Board:

John Schlendorf, CFA, *President*
Carl Burgdorfer, CFA, *Treasurer*
Andrew Fisher, CFA, *Program Chair*
Mark Corcoran, CFA, *Membership Chair*
Chad Phillips, CFA, *Education Chair*
Dougal Williams, CFA, *Secretary*
Lisa Decker, CFA, *Public Awareness Chair*
John Settle, CFA, *University Liaison*
Stacey Flier, CFA, *Past President*



Sponsorship Registration and Payment Form

Second Annual Forecast Dinner

CFA SOCIETY OF PORTLAND

Want to be a sponsor? Fill out the form below and email to Lisa Decker, Public Awareness Chair at info@cfaportland.org.

Please print or type:

Company (as you would like it announced or printed) _____

Principal Contact Person _____

Address _____

City _____ State _____ Zip _____

Telephone () _____ Fax () _____

Email Address _____

Sponsorship Level:		Quantity	Total
Presenting	\$8,000	_____	_____
Gold	\$4,000	_____	_____
Silver	\$2,500	_____	_____
Table (8 seats)	\$750	_____	_____

Individual Tickets (Individual tickets can also be purchased at www.cfaportland.org):

Before 12/31/06		Quantity	Total
Member	\$75	_____	_____
Non-Member	\$85	_____	_____
After 12/31/06			
Member	\$85	_____	_____
Non-Member	\$95	_____	_____

Total Payment Amount: \$ _____

Please send check or money order to:
 CFA Society of Portland (CFASP)
 P.O. Box 434
 Portland, OR 97207-0434

All sponsors will be contacted upon receipt of payment with a request for a **guest list**, as well as a **current logo** to be used as per the sponsorship agreement. The deadline for lists and logos is **January 15th, 2008**. Information can be sent in advance to Lisa Decker per the contact information above.

