



2020 Partnership Opportunities

CFA Society Cleveland is supported by partners like you who help offset the cost of delivering quality programming to our members. Your generous sponsorship allows CFA Society Cleveland to offer events and continuing education to our 500 plus CFA Institute, CFA Society Cleveland local members and members of the local finance community. With your help we further our mission of promoting professional development, ethics, and awareness through outreach to and engagement with the financial community,

Our Gold, Silver and Bronze packages for the 2020 Wealth Management Conference and additional add-on (on back of form) sponsorship opportunities offer you an excellent opportunity to be a valued partner of CFA Society Cleveland and enjoy the benefits of establishing a relationship with the financial community in Cleveland and Northeast Ohio.

2020 Wealth Management Conference September 2020 More Details Available Soon

2019 CFA Society Cleveland Wealth Management Conference Sponsorship Levels	Gold \$5000	Silver \$3000	Bronze \$1500
Number Sponsorships Available	2	3	Unlimited
Exhibition Table	Prime Location	Good Location	•
Table at event for guests	1 Table of 8	4 Seats	2 Seats
Large Banner	•		
Opening Remarks Mention	•		
Supply Company Materials	•		
Podium Signage	•	•	
Web Site Listing	•	•	
Social Media Recognition	•	•	
# Job Postings	2	1	
Brand Placement	Prominent	Better	Good
Entrance Signage	•	•	•
Table Top Signage	•	•	•
Program Listing	•	•	•
Email Recognition	•	•	•



Partnership Commitment Form and Payment Form



Please return to CFA Society Cleveland. Invoices will be emailed

Email: cfa@cleveland.cfasociety.org
Mail: 24199 Lyman Blvd Shaker Heights OH 44122

Partnership Level

- Gold Partner \$5000
- Silver Partner \$3000
- Bronze Partner \$1500

Additional Sponsorship Opportunities

- Kickoff Lunch in September \$2500
- Annual Forecast Lunch in January/February \$2500
- Women's Networking Breakfast (2 per year) \$500
- All Member Social Event - (3 per year) \$1000
- Annual Member Event - June \$500
- Lunch Speaker Sponsorship \$1500
- Wealth Management Conference Happy Hour (4-5PM day of conference) \$1500
- Corporate Yearly Membership - 2 seats at each event \$1000

Annual Harry W. Millis Golf Outing - August 2020 Shaker Heights Country Club

- Title Sponsor \$3000
- Dinner Sponsor \$1500
- Lunch Sponsor \$1500
- Cart Sponsor \$1500
- Golf Lesson Sponsor \$1000
- Locker Room Sponsor \$1000
- Beverage Sponsor \$500
- Hole Sponsor \$300

Partner agrees to the above terms, and hereby applies for a Gold - Silver - Bronze (circle one) Partnership

Signature

Date

Company Name

Contact Name

Mailing Address, City, State and Zip Code

Email

Phone

Website link to be added to CFASociety Cleveland Website

Thanks for partnering with CFA Society Cleveland, we look forward to another succesful year!

