



**CFA Society
Cleveland**

3RD ANNUAL WEALTH MANAGEMENT CONFERENCE



2019 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 2019 Wealth Management Conference and additional add-on 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.

September 11, 2019

11:30AM to 5:00PM

The Silver Grille at the
Ritz Carlton, Tower City

KEYNOTE SPEAKER:

Howard Marks
Oak Tree Capital

Dr. Giovinazzo
Fuller Thayer

Jean Dunn
T. Rowe Price

**Speaker 4 to be
announced soon**

Expected Attendance: 200

| Sponsorship Levels | Gold \$5,000 | Silver \$3,000 | Bronze \$1,500 |
|---|-----------------|-------------------|-------------------|
| Number of 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 AND PAYMENT FORM

Please return to CFA Society Cleveland on or before May 1, 2019.
Invoices will be emailed.

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

PARTNERSHIP LEVEL

- Gold Partner \$5,000
 Silver Partner \$3,000
 Bronze Partner \$1,500

ADDITIONAL SPONSORSHIP OPPORTUNITIES

- | | |
|---|---------|
| <input type="checkbox"/> Kickoff Lunch in September | \$2,500 |
| <input type="checkbox"/> Annual Forecast Lunch in January/February | \$2,500 |
| <input type="checkbox"/> Women's Networking Breakfast (2 per year) | \$500 |
| <input type="checkbox"/> All Member Social Event (3 per year) | \$1,000 |
| <input type="checkbox"/> Annual Member Event in June | \$500 |
| <input type="checkbox"/> Lunch Speaker Sponsorship | \$1,500 |
| <input type="checkbox"/> Wealth Management Conference Happy Hour (4-5PM day of conference) | \$1,500 |
| <input type="checkbox"/> Corporate Yearly Membership – 2 seats at each event | \$1,000 |

ANNUAL HARRY W. MILLIS GOLF OUTING – August 19, 2019 Shaker Heights Country Club

- | | |
|--|---------|
| <input type="checkbox"/> Title Sponsor | \$3,000 |
| <input type="checkbox"/> Dinner Sponsor | \$1,500 |
| <input type="checkbox"/> Lunch Sponsor | \$1,500 |
| <input type="checkbox"/> Cart Sponsor | \$1,500 |
| <input type="checkbox"/> Golf Lesson Sponsor | \$1,000 |
| <input type="checkbox"/> Locker Room Sponsor | \$1,000 |
| <input type="checkbox"/> Beverage Sponsor | \$500 |
| <input type="checkbox"/> 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 _____

ADDRESS _____

CITY _____ STATE _____ ZIP CODE _____

E-MAIL _____ PHONE _____

Website link to be added to CFA Society Cleveland Website

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