2017 Annual Forecast Dinner

Connecticut Convention Center
Thursday, January 26, 2017
5:00 PM - 9:00 PM

Sponsorship Opportunities
Event Overview

“A New Path: The Growth & Reflation Trade”

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Please join the CFA Society Hartford as we celebrate our 2017 Annual Forecast Dinner on Thursday, January 26, 2017. This is the Society’s premier networking event of the year, bringing together over 400 of the Hartford area’s leading investment and financial professionals as well as key decision makers in other local organizations. Sponsorship Opportunities provide firm exposure at the Annual Forecast Dinner and on the Society website as well as networking opportunities to engage our members and guests throughout the year at periodic luncheons and conferences hosted by the Society.

Sponsorship Levels start at $1,000 for our Non-Profit Sponsorship level and continue to the Diamond Sponsorship at $10,000.

AGENDA

5:00 PM
Networking / Social Hour Exhibitors

6:15 PM
Dinner

Welcome
Raymond Bovich, CFA
President
CFA Society Hartford

The Future of Hartford
Luke Bronin
Mayor of Hartford

Opening Remarks
Paul Smith, CFA
President & CEO
CFA Institute

7:00 PM
Keynote Speaker
Douglas Coté, CFA
Chief Market Strategist, VOYA Investment Management
“A New Path: The Growth & Reflation Trade”
Voya Global Perspectives
2017 Forecast

The U.S. elections ushered in a new path forward with a populist uprising that voted out the incumbent party. The markets celebrated President-Elect Donald Trump’s pro-growth economic policies worldwide with rising markets and rising yields. This will certainly assist the Fed’s path to normalization by allowing it to scale back its unconventional monetary policies – the old path. The new path order is classical economic policies that promote free market capitalism through tax and regulatory reform. Substantial risks and uncertainties remain: President-Elect Trump’s anti-growth protectionist policies; a distaste for pro-growth structural reforms in Europe; a possible U.S. dollar surge wreaking havoc with commodity nations; and an unexpected China growth scare. But, there is evidence that pent up animal spirits have been sparked by the election and we look for this to bolster growth and reflation in 2017. Douglas Coté, CFA will address these and other topics with relevance to the outlook for 2017.

Keynote Speaker
Douglas Coté, CFA
Chief Market Strategist
VOYA Investment Management

Douglas Coté, CFA, is the chief market strategist at Voya Investment Management. He is also the senior portfolio manager and founder of the Voya Global Perspectives Funds and separately managed accounts, a group of global tactical asset allocation strategies. With over 20 years of active money management experience as a portfolio manager and hedge fund chief investment officer, Doug delivers hands-on interpretations of the forces driving capital markets and effective ways to respond. Previously, he was a portfolio manager with the firm and managed over $14 billion in equity assets. Doug is regularly featured on Fox Business’ Mornings With Maria with Maria Bartiromo, Bloomberg TV’s In the Loop with Betty Liu, CNBC Squawk Box, and other media outlets. A recognized authority on trading cost, impact and timing risk, he has also been published in the International Journal of Managerial Finance and other publications, coining the term “Honest EPS” as a way of identifying high quality stocks. He holds the Chartered Financial Analyst® designation.
About CFA Society Hartford
CFA Society Hartford is the leading association of local investment professionals in Connecticut, steeped in rich history spanning over 60 years. The non-profit organization has been serving Connecticut since 1953.

Top employers of CFA Society Hartford Members
The Society's membership is well represented in all the leading financial institutions in the area: Virtus Investment Partners, HIMCO, Prudential, VOYA, Babson Capital, CIGNA, Conning Asset Management, Fiduciary Investment Advisors, Aegis Wealth Partners, Webster Bank and more.

Dinner Attendee Demographics
The attendee profile reflects aggregate data from the past five CFA Society Hartford Annual Dinners.

403 Average Investment Professional Attendees

Attendee Occupation
- Portfolio Manager (32%)
- Chief-Level Executive (14%)
- Research Analyst (9%)
- Consultant (7%)
- Relationship Manager (7%)
- Manager of Managers (5%)
- Financial Advisor (5%)
- Strategists (4%)
- Risk Managers (4%)
- Other (13%)

Top Firms Represented
- The Hartford (16%)
- Conning (15%)
- Virtus/Newfleet (9%)
- Fiduciary Investment Advisors (7%)
- MassMutual (7%)
- Prudential (7%)
- VOYA (6%)
- Business Schools/Universities (5%)
- CIGNA (5%)
- Webster Bank (5%)
- Other Firms (18%)

Sponsorship Contacts
To secure sponsorship opportunities and gain access to investment professionals attending the 2017 Annual Forecast Dinner, please contact:

Shannon Carbray, CFA
scarbraycfa@yahoo.com
(860) 707-6472

Rakesh Kansara, CFA
Rakesh.kansara@gmail.com
(240) 353-6002
## Forecast Dinner Sponsorship Opportunities

*All benefits are dependent on the Sponsor providing the required materials and information prior to deadlines.*

<table>
<thead>
<tr>
<th>Level</th>
<th>Diamond $10,000</th>
<th>Platinum $7,500</th>
<th>Gold $5,000</th>
<th>Silver $3,500</th>
<th>Bronze $2,000</th>
<th>Non-Profit $1,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Sponsorships available at each level</td>
<td>1</td>
<td>SOLD</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>7</td>
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### Pre-Event Benefits
- Corporate name printed as a sponsor in Formal Invitation mailed to 1,000 members and past attendees
- Listing as sponsor in Annual Meeting eblasts/digital invitations

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<tr>
<th>Level</th>
<th>Pre-Event Benefits</th>
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<tbody>
<tr>
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<td>Logo</td>
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### Event Benefits
- Annual Dinner Guest Tickets (10 guests per table). Additional tables can be purchased for $1,100/each
- Prime table placement of corporate sponsored tables at Annual Dinner
- Prominent Display of logo on tables as an event sponsor
- Full Color Advertisement in the Program Booklet
- Firm name, description, and logo listed in Annual Dinner Program
- Company logo on name badges of all attendees
- Firm logo as a sponsor on signage at Annual Dinner Attendee Registration
- Firm name/logo as a sponsor on signage at Social Hour
- Exhibitor Table/Booth (8’x30”) in Social Hour/Reception area
- Firm Logo Display: projection screens will display logo image as a sponsor multiple times during program
- Special Recognition as a sponsor during President’s Opening Remarks

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<tr>
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<td>Logo &amp; Company Description</td>
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### Post-Event Benefits
- List of attendees including Name, Company and Job Title
- Priority Speaker at CFA Society Hartford Education Luncheon(s) including one Investment Conference*
- Listing as sponsor in Society’s Post-Event Newsletter and One Year listing on CFA Website with organization/Business Description.

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*Based on request from Sponsor and Sponsor's business alignment with program topic*

## Forecast Dinner Event Registration

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<tr>
<th>Purchase Options</th>
<th>Before January 15th</th>
<th>After January 15th</th>
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<tbody>
<tr>
<td>Table of 10</td>
<td>Members &amp; Non-Members $1,100</td>
<td>$1,300</td>
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<tr>
<td>Individual Seats</td>
<td>CFA Society Hartford Member $90</td>
<td>$110</td>
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<tr>
<td></td>
<td>Non-Member $135</td>
<td>$145</td>
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Forecast Dinner Program
Advertising Opportunities

The CFA Society Hartford Forecast Dinner program is a great place to get the word out about your company. With more than 500 printed, our program advertisements reach hundreds of leading investment and financial professionals.

We offer many advertising options to fit every budget and every need. Select from three size options.

With the Half Page & Full Page advertisements, add a ticket to the Forecast Dinner for an additional $50.

2017 Rates

Full Color Advertisements

1/8” Page, 1.25” x 2.5”
$140.00

Quarter Page, 1.75” High x 5” Wide or 5” x 1.75” Wide
$150.00

Half Page, 3.75” High x 5” Wide
$250.00
$300.00*

Full Page, 7-1/2” High x 5” Wide
$450.00
$500.00*

*Includes one (1) Admission to Forecast Dinner