The 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.

By supporting the CFA Society New Mexico you are also supporting our on-going effort to provide our members and our community with educational and professional enrichment.

We sincerely thank you for your support!

For Sponsorship Opportunities please contact Sonny Gokhale, CFA
505.847.6389 or at sonny@ironoakcapital.com
Why Sponsor the CFA Society New Mexico?

The CFA Society New Mexico (CFANM) 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 CFANM 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.

KEY BENEFITS OF SPONSORING CFANM

• 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

• Annual Society Sponsorship
• CFANM Annual Events
• 16th Annual Economic Forecast Dinner
• Putting Investors First Symposium
• Monthly Luncheons

For Sponsorship Opportunities please contact Sonny Gokhale, CFA
505.847.6389 or at 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 80 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
21% Female / 78% 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 ensures 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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505.847.6389 or at sonny@ironoakcapital.com
CFA SOCIETY NEW MEXICO
16th ANNUAL ECONOMIC FORECAST DINNER
Thursday, February 12th, 2015     Albuquerque, NM     Tanoan Country Club

Expected Attendance: 100 – 150 people

Please join CFA Society New Mexico as we celebrate our 16th 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:
Troy Davig, Senior Vice President & Director of Research, Federal Reserve Bank of Kansas City

In this role, Mr. Davig is the Bank’s chief economic policy advisor and provides executive oversight for the Bank’s Research Division. He is a member of the Bank’s Management Committee, which has responsibility for the Bank’s strategic planning and policy direction.

He holds a bachelor of arts in economics from the University of Colorado, Boulder, and a Ph.D. in economics from Indiana University.

PAST SPONSORS INCLUDE:

For Sponsorship Opportunities please contact Sonny Gokhale, CFA
505.847.6389 or at sonny@ironoakcapital.com
## 2015 Economic Forecast Dinner Sponsorship Opportunities

### 2015 Economic Forecast Dinner Sponsorship Levels

<table>
<thead>
<tr>
<th></th>
<th>Gold</th>
<th>Silver</th>
<th>Bronze</th>
<th>Table</th>
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<tbody>
<tr>
<td>Commitment</td>
<td>$1500</td>
<td>$1000</td>
<td>$750</td>
<td>$500</td>
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<td>Number of Sponsorships Available at Each Level</td>
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### Sponsorship Benefits

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<tr>
<td>Economic Forecast Dinner Seating</td>
<td>★</td>
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<tr>
<td>Prime Location</td>
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<td>Priority Location</td>
<td></td>
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<tr>
<td>Sponsor Logo and Link on CFANM Homepage</td>
<td>★</td>
<td>★</td>
<td>★</td>
<td>★</td>
</tr>
<tr>
<td>Sponsor Logo in CFANM Emails</td>
<td>★</td>
<td>★</td>
<td>★</td>
<td>NAME ONLY</td>
</tr>
<tr>
<td>Sponsor Logo on Signage on Display during Event</td>
<td>★</td>
<td>★</td>
<td>★</td>
<td>NAME ONLY</td>
</tr>
<tr>
<td>Sponsor Recognition in Program (Logo/Name)</td>
<td>★</td>
<td>★</td>
<td>★</td>
<td>NAME ONLY</td>
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<tr>
<td>Sponsor Logo displayed on Screens during Social Hour Before Registration</td>
<td>★</td>
<td>★</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsor’s Literature Available at Registration Table</td>
<td>★</td>
<td>★</td>
<td></td>
<td></td>
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<tr>
<td>Sponsor’s Literature Available on Tables</td>
<td>★</td>
<td></td>
<td></td>
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<tr>
<td>Opportunity to Provide Promotional Items</td>
<td>★</td>
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</table>

### Additional Sponsorship Opportunities:

Wine Sponsor  $350

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For Sponsorship Opportunities please contact Sonny Gokhale, CFA  
505.847.6389 or at sonny@ironoakcapital.com
Putting Investors First is a one-day symposium on professional investment management standards to be held May 21, 2015 in Albuquerque, NM. The symposium is being organized by CFA Society New Mexico as a part of the CFA Institute’s Future of Finance initiative. This premier event begins with breakfast, includes workshops, continues through lunch and additional workshops and concludes in the afternoon.

It is targeted to financial services, accounting, and legal professionals as well as individual investors. The purpose of this event is to build awareness of the duty to protect investor interests and to encourage financial professionals to make a commitment to place investor interests above all others.

**2015 PUTTING INVESTORS FIRST SYMPOSIUM SPONSORSHIP OPPORTUNITIES**

Premier Keynote Sponsor

2 Sponsorships Available
- Sponsor Link & Logo on CFA NM page
- Sponsor Logo on Signage on Display during Event
- Firm Name on Front Stage Signage
- Recognition during Opening Remarks of Keynote
- Firm Name and Logo on Projection Screens throughout Event
- Opportunity to Provide Promotional Items

Workshop Speaker Sponsor

6 Sponsorships Available
- Sponsor Link & Logo on CFA NM page
- Sponsor Logo on Signage on Display during Event
- Firm Name on Front Stage Signage
- Recognition during Opening Remarks of Breakout Session
- Firm Name and Logo on Projection Screens throughout Event
- Opportunity to Provide Promotional Items

For Sponsorship Opportunities please contact Sonny Gokhale, CFA
505.847.6389 or at sonny@ironoakcapital.com
OTHER CFANM SPONSORSHIP OPPORTUNITIES:
MONTHLY EDUCATION LUNCHEON PROGRAMS

CFA Society New Mexico is committed to providing professional development opportunities to our members. Monthly luncheons featuring top quality speakers and industry professionals give insight and knowledge to attendees. These events attract anywhere between 20 to 30 members and guests and are a great opportunity for networking and idea sharing.

Sponsorships are available for CFANM luncheons for which members receive Continuing Education credit. Luncheon sponsors typically provide a cash sponsorship of $350 to be considered full sponsors. Other types of sponsorship can be constructed as well. Sponsors may provide a speaker and cover the speaker's expenses or speaker fees.

ANNUAL SOCIETY LUNCHEON SPONSORSHIP

We also offer you the opportunity to become an annual CFANM Luncheon Sponsor. Rather than sponsoring one event, your investment would be used across every CFANM luncheon events and provide you with exposure and brand growth opportunities throughout the year. Your sponsorship also includes two tickets that can be used at any CFANM Luncheon event you choose to attend. The table below includes specifics about each Annual Luncheon Sponsorship Level.

<table>
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<tr>
<th>2015 CFANM ANNUAL SPONSORSHIP LEVELS</th>
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<td>Sponsor Logo and Link on CFANM Homepage</td>
<td>★</td>
<td>★</td>
<td>NAME ONLY</td>
</tr>
<tr>
<td>Sponsor Logo in CFANM Emails</td>
<td>★</td>
<td>★</td>
<td>NAME ONLY</td>
</tr>
<tr>
<td>Sponsor Logo on Signage on Display during Event</td>
<td>★</td>
<td>★</td>
<td>★</td>
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<tr>
<td>Firm Name on Projection Screens Before Event</td>
<td>★</td>
<td>★</td>
<td></td>
</tr>
<tr>
<td>Opportunity to Provide Promotional Items</td>
<td>★</td>
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<td></td>
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For Sponsorship Opportunities please contact Sonny Gokhale, CFA
505.847.6389 or at sonny@ironoakcapital.com
# SPONSORSHIP AGREEMENT

## ECONOMIC FORECAST DINNER

<table>
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<th>Level</th>
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<td>WINE</td>
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## CFA SOCIETY NEW MEXICO ANNUAL LUNCHEON SPONSORSHIP

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<td>BRONZE</td>
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## PUTTING INVESTORS FIRST SYMPOSIUM

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<td>WORKSHOP SPEAKER</td>
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Please remit payments to:
CFA Society New Mexico  
P.O. BOX 36947  
Albuquerque, NM 87176-6947

### PAYMENT INFORMATION

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

Primary Sponsor Contact Name

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

Mailing Address

Primary Phone          Primary Email

Authorized Signature    Date

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