ABOUT US

OUR MISSION
To drive member value and foster a vibrant finance community by promoting the highest standards of ethics and professionalism through outstanding educational and networking events in central Florida.

THE CHARTER
We are a member society of the CFA Institute representing over 125,000 financial professionals. The Chartered Financial Analyst® (CFA) credential has become the most respected and recognized investment designation in the world. “The gold standard among countless finance degrees” – Financial Times.

OUR MEMBERS
Over 170 influential finance professionals in the central Florida region.

- Chief Level Executives
- Portfolio Managers
- Financial Advisors
- Investment Consultants

Our member base is responsible for or helps to manage billions in client’s assets. According to CFA Institute, 65 of our members work for firms with assets under management in excess of $1 billion.

WHAT WE DO
The society holds educational and social events designed to add value to our members and strengthen the central Florida finance community. Our marquee event is the annual investment dinner, regularly attended by 100+ finance professionals, lawyers, clients, and those interested in learning about finance and the economy.

PAST SPEAKERS
The society focuses on bringing luminaries from the industry to central Florida. Examples of past speakers include –

- Charley Ellis
- Peter Schiff
- Marc Faber
- Elizabeth Hamilton Keen
- Leah Bennett, CFA
- Bob Doll
- Harry Markopolos
- Jim Rogers
- Dr. Jeremy Siegel
- Jim Swanson, CFA

SOCIETY AWARDS
CFA Society Orlando was recognized by CFA Institute in 2014 and 2015 as recipient of Society Excellence Awards. The awards recognize exceptional across-the-board performance.

SOCIETY MOMENTUM
The society has shown impressive growth in the past year with memberships up 10% and strong attendance at many marquee society events, including our annual Career Services event, Putting Investors First Event and Annual Forecast Dinner.

PUTTING INVESTORS FIRST
The society embraces the putting investors first initiative from the CFA Institute with advocacy efforts, which in part lead to Governor Scott’s declaration of May as putting investors first month in Florida in
OPPORTUNITIES

Build credibility by partnering with the premier organization for investment professionals in central Florida.

MAXIMUM EXPOSURE THROUGH MULTIPLE TOUCH POINTS

In addition to recognition at our events, sponsors may receive logo recognition through –

- Inclusion in quarterly newsletter reaching approximately 1,000 professionals.
- Website logo recognition.
- Inclusion in email communications to member base and community at large. CFA Society Orlando constantly reaches out to the central Florida community promoting events, conferences, partner events, etc.
- Logo recognition in all promotional materials.

CUSTOMIZE YOUR LEVEL OF SPONSORSHIP

- Flexibility allows for annual sponsorships or single event sponsorships.
- Special packages may be available.

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<thead>
<tr>
<th>Sponsorship Level</th>
<th>Platinum*</th>
<th>Gold*</th>
<th>Silver*</th>
<th>Premium Single Event</th>
<th>Single Event</th>
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<td>Logo on all Marketing for Event</td>
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*Platinum, Gold, and Silver sponsorships are valid for a 12-month period.
THANK YOU

CFA Society Orlando appreciates your support and consideration of a partnership.

As a sponsor, you become a valued partner in our efforts to build a strong, vibrant investment community in central Florida.

We invite each and every one of our partners to attend events and get to know our audience. We welcome participation and a sharing of ideas on how to best reach our mutual goals.

Your support allows the society to achieve our goals of becoming a widely respected and highly valued organization in the community.

Please reach out to our current Programming Chair at programming@cfaorlando.org for more information.