



CFA Society
Ottawa

CFA SOCIETY OTTAWA

2020 **SPONSORSHIP PACKAGE**



2020 FORECAST DINNER
APRIL 15, 2020 | 5:00 PM
SHAW CONVENTION CENTRE

With 400+ members in the Ottawa-Gatineau region, the CFA Society Ottawa's mission is: To support the business and professional growth of its members by: Promoting awareness of the CFA charter amongst the local community, key employers and the investing public; and providing opportunities for the local financial community to gather in a collegial atmosphere of knowledge sharing and networking.

Aligned with our mission the annual CFA Society Ottawa Forecast Dinner is the foremost investment conference in the nation's capital, attended by investment professionals, including portfolio managers, security analysts, investment advisors, corporations, and CFA Program candidates.



KEYNOTE SPEAKER

THE RIGHT HONORABLE STEPHEN HARPER

CHAIRMAN AND CHIEF EXECUTIVE OFFICER OF HARPER & ASSOCIATES

The Right Honourable Stephen Harper served as Canada's 22nd Prime Minister from 2006 to 2015, the longest-serving Conservative Leader to hold this office since Canada's founding Prime Minister. Prime Minister Harper created the modern Conservative Party of Canada and won three successive national elections, in 2006, 2008, and 2011. A strong advocate for free trade and open markets, Prime Minister Harper led a government that focused on pragmatic, growth-oriented economic policies and results-driven social policy.

Prime Minister Harper's keynote address will offer the audience insights into his experience while in office, including stories and lessons in leadership and governance. Prime Minister Harper will also provide his perspectives on the outcome of the Canadian election, his assessment of current affairs affecting geopolitics, international relations and financial markets.



KEYNOTE SPEAKER

MARGARET FRANKLIN, CFA

PRESIDENT AND CEO, CFA INSTITUTE

Margaret Franklin, CFA, leads CFA Institute and its more than 170,000 members worldwide in promoting the highest standards of education, ethics, and professional excellence in the investment profession. She assumed her role in September 2019 and has more than 25 years of investment and wealth management experience.

Before joining CFA Institute, Margaret led International Wealth Management for North America and was president of BNY Mellon Wealth Management, Advisory Services in Canada. She also served as a board member of BNY Mellon Trust Company (Cayman). Margaret previously served as chair of CFA Institute Board of Governors and is a former president of the CFA Society Toronto Board. She is a founding member of the CFA Institute Women in Investment Initiative, a past recipient of the Alfred C. Morley Distinguished Service Award in 2014, and a member of its Future of Finance Content Council.



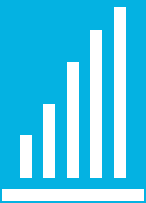
EVENT HOST

ERICA SIGURDSON

RENOWNED COMEDIAN

Best known for her rapier wit on CBC Radio's smash hit *The Debaters*, as well as her numerous television appearances on both CBC and CTV - Erica Sigurdson is one of Canada's most beloved comedians.

Having performed in Iceland, Singapore, Thailand, England, The Philippines, Afghanistan and from coast to coast in Canada – Erica Sigurdson has a comedy following world-wide. In addition to her accomplishments on stage, Erica is an award-winning comedy writer – having won a Leo Award for co-writing the 21st Annual Gemini Awards. As a story-editor Erica has written for CBC's *Mr. D* and CTV's *Corner Gas Animated* as well as numerous pilots.



STRATEGIC EVENTS

- Forecast Dinner
- Women in Investment Management
- Industry Expert Knowledge Sharing
- Member Celebrations



EDUCATION

- Forum Conference
- Continuing Professional Development
- University Relations
- Mock Exams
- Financial Literacy



CAREER SUPPORT

- Mentorship Program
- Career Fair Wine & Cheese
- Job Board
- Networking Opportunities



COMMUNICATION

- Newsletters
- Social Media
- Brand Awareness Campaigns
- Society Updates
- Member Discounts

UPCOMING EVENTS

ANNUAL LIFESTYLE EVENT

JANUARY 28, 2020

The CFA Society Ottawa is introducing a lifestyle event – the first of its kind – to its annual programming line-up. Our event will bring together CFA charterholders and candidates, as well as the local finance community for a multi-speaker conference on mindfulness, focus, and a healthy work/life balance. The event is set to take place on the morning of January 28, 2020 and our speakers for the inaugural lifestyle event include: Jason Voss, who'll speak about meditation for generating investment alpha; and Dr. Greg Wells, who'll describe best practices for improved focus. Following the presentations, Mr. Voss and Dr. Wells will be available for a book signing.

ANNUAL GOLF TOURNAMENT

JUNE 2020

The CFA Society Ottawa Golf Tournament is an afternoon of fun, sun and networking held annually each June. Golfers enjoy a collegial round of golf, lunch, cocktails and the good company of fellow CFA Society Ottawa members, candidates and supporters.

FORUM CONFERENCE & CAREER FAIR

SEPTEMBER 2020

The Forum Conference offers a full day of networking and speaking events in September. Participants have the opportunity to learn from, and engage with experts representing multiple asset classes and influential keynote speakers. The event is both entertaining and educational. The Forum Conference is followed by the Career Fair Wine & Cheese event, where students and job seekers have the opportunity to network with some of the most prominent and sought-after employers interested in meeting CFA charterholders and candidates. Information on the 2019 Forum Conference & Career Fair, including speakers and sponsors, can be found on our website.

SPONSORSHIP OPPORTUNITIES

SPONSORSHIP OPPORTUNITIES	TITLE	PLATINUM	GOLD	SILVER	BRONZE	CONTRIBUTOR
Right of first refusal to be next year's title sponsor	X					
FORECAST DINNER April 15, 2020						
Introduction of Keynote Speaker	x					
Tables at Forecast Dinner (additional tables receive \$100 discount)	2	1	1	1		
Guest Tables for CFA Candidates/students	2					
Table Seating	Front	Front	Central			
Corporate ad in event program, logo at event reception, logo on website	Full Page	Half Page	Half Page	Logo Only	Logo Only	
FORUM CONFERENCE & CAREER FAIR September 2020						
Introduction of Keynote Speaker	x					
Speaking slot: 25 minutes + 5 minutes Q&A	x	x				x
Company representative tickets	4	4				4
Booth at Wine and Cheese Career Fair	1	1				1
Corporate ad in event program, logo at event reception, logo on website	Full Page	Half Page			Logo Only	Half Page
ANNUAL GOLF TOURNAMENT June 2020						
Company representative tickets	4	4	2	2	2	2
ANNUAL LIFESTYLE EVENT January 28, 2020						
Company representative tickets	4	4	2	2	2	2
PRICE (CAD)	15,000	7,500	5,500	4,500	2,500	3,000

For more information, or to secure sponsorship, contact events@cfaottawa.ca or visit our website at: cfasociety.org/ottawa.

THANK YOU

TO OUR 2019 FORECAST DINNER SPONSORS

TITLE



PLATINUM



GOLD



SILVER



BRONZE



THANK YOU

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