Reach hundreds of key financial and investment decision makers with a sponsorship in CFA Society Pittsburgh!

Our goal is to generate more recognition and networking opportunities for your organization through our special event and partnership sponsorship programs.

**BENEFITS**

- Positive association and exposure for your organization and its products/services through premium visibility with industry leading firms and professionals in the region.
- Access to our members through event attendance, our website, e-mails, and newsletter.
- Network with and cultivate relationships with a targeted group of financial professionals, colleagues, and clients.
- Priority signage, tabling/seating, and marketing.
- Support professional development and continuing education.

**MEMBERSHIP FAST FACTS**

- Our over 420 members are represented across 140 organizations.
- Our members average more than 20 years of experience.
- More than 140 members manage institutional assets.
- Over 110 members are in private wealth management.
- Our top five employers include Federated Investors, BNY Mellon, PNC Financial Services, Wilshire Associates, and C.S. McKee.
- Top reported job functions include:
  - Portfolio Managers (32%)
  - Analyst (14%)
  - Investment Consultant (12%)
  - Chief Level Executive (10%)

**CFA SOCIETY PITTSBURGH**

CFA Society Pittsburgh was formed in 1957 and is a chapter of the CFA Institute (CFAI). The mission of the Society is to lead the regional investment profession by providing educational and career development opportunities for members, investment professionals, and the community. The Society pursues this mission by actively promoting ethical and professional standards within the investment industry, encouraging professional development through the Chartered Financial Analyst (CFA) Program, and by facilitating the open exchange of information and opinions. The CFAI is a global organization that awards the CFA charter and leads the investment industry by setting the highest standard for ethics and professional excellence while vigorously advocating for professional development and a fair capital markets system.

The CFA Society Pittsburgh has 420 members of which 93% hold the CFA designation. In addition, our event invites typically go out to approximately another 400 candidates for this prestigious designation. The CFA designation is often considered the “gold standard” in the investment management industry. Our members are frequently the key decision makers at their firms and work in diverse areas of investment management and finance, including institutional portfolio management, investment consulting, plan sponsors, private wealth management, hedge funds, private equity, corporate finance, and academia. We also periodically partner with other local professional organizations, have educational partnerships with universities, and a financial literacy campaign with Junior Achievement.

Your sponsorship will assist the Society in its ongoing effort to provide high quality programming, to raise awareness in our local community, increase membership and participation, and continue our mission of investor advocacy. Your sponsorship will identify your organization as one that understands the need to support the highest standards in the financial services industry by endorsing a professional organization such as CFA Society Pittsburgh. Additionally, sponsoring of our events will provide your organization a high profile opportunity in front of our members and their colleagues in both formal and informal settings, thus providing exposure to and interaction with this targeted group. We host monthly educational and/or social events as well as special events, including our:

- Annual Meeting & New Charter Awards Ceremony
- Endowments & Foundations Conference
- Investment Research Challenge
- Market Outlook Dinner
- Stock Pickers Luncheon
Following you will find we have created both annual partnership and special event sponsorship opportunities to suit the needs of every budget. Please choose the opportunity that best fits your organization and contact the CFA Society Pittsburgh today.

**ANNUAL PARTNERSHIPS**
These annual sponsorships are designed to provide support from the employers and vendors of our members. Some of the benefits of this partnership include:

- Increasing awareness of your organizations’ name, brand, and services
- Providing a unique marketing opportunity by recognition at selected program events
- Supporting employee involvement in the CFA program and the value of professional development and the credentialing activity
- Helping the investing public through the society’s ethical standards and increasing advocacy efforts

### MARKET OUTLOOK DINNER | January 5, 2015
This event is one of our most highly attended, drawing over 100 investment professionals from our region. This premier networking event includes dinner and cocktails and brings together a panel of some of the region’s top investment leaders and key decision makers to share their views on the economy, market environment, and recommended strategies.

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<tr>
<th>Benefits</th>
<th>GOLD</th>
<th>SILVER</th>
<th>BRONZE</th>
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<td>Event Tickets</td>
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<td>Additional Event Tickets</td>
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<td>Company logo/advertisement in Program</td>
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<td>Company Information Table</td>
<td>Display Table</td>
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<td>at Registration Table</td>
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<tr>
<td>Recognition in Quarterly Newsletter</td>
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<td>Opening Remarks Recognition</td>
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<td>Participate in Opening Remarks</td>
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<td>Opportunity to provide promotional item</td>
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<tr>
<td>Free Job Posting</td>
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**STOCK PICKERS LUNCHEON** | February 18, 2015

Our annual stock picker’s luncheon provides attendees the opportunity to hear from some of their esteemed colleagues as our panel shares their best stock ideas for the year. Each featured contestant will offer three stock names which they perceive as having the best prospects for superior price change performance between the luncheon date and the end of the calendar year. The contestants will share company background and financials, and discuss the rationale for the picks. The event is informative and entertaining for both equity and fixed income professionals that enjoy hearing different perspectives as well as crunching the data.

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<td>Free Job Posting</td>
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**INVESTMENT RESEARCH CHALLENGE** | March 2, 2015

The CFA Institute Research Challenge is an annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis. Students gain real-world experience as they assume the role of a research analyst and are tested on their ability to value a stock, write an initiation-of-coverage report, and present their recommendations.

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<tr>
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<tr>
<td>Opportunity to encourage students pursuing an investment management career</td>
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<td>Opportunity to meet likely further Charter holders</td>
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<td>Table for marketing material and/or promotional items</td>
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<td>Special recognition during Opening Remarks</td>
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<td>Opportunity to address students and audience</td>
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ANNUAL MEETING/CHARTER AWARD SOCIAL | Date to be determined
This ceremonious social event draws some of our most engaged members to an event. Members, candidates, and new charter holders socialize and network in a festive atmosphere. By attending and sponsoring this event, Pittsburgh firms support their society member employees and honor newly inducted Charter Holders as they’re awarded their designation. Ensure your company is represented as a sponsor for this high profile event.

<table>
<thead>
<tr>
<th>Sponsorship Level</th>
<th>GOLD*</th>
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<tr>
<td>Number of Sponsorships Available</td>
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Benefits

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<th>Benefit</th>
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FINANCIAL LITERACY CAMPAIGN AND COMPETITION | Dates to be determined
Two programs have been created to foster financial literacy among students. The first is aimed at high school students who receive and read The Missing Semester (recognized as the 2013 Book of the Year for “excellence in financial literacy education” by the Institute for Financial Literacy) and create a personal financial plan to be judged by their peers. The second, Involvement in Collegiate Financial Plans, encourages local colleges to incorporate The Missing Semester into their curriculum. A “certificate of accomplishment” will be awarded to college students who create personal financial plans and meet a minimum standard.

<table>
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<td>Number of Sponsorships Available</td>
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Benefits

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<tbody>
<tr>
<td>Recognition of support level on Financial Literacy Webpage</td>
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<tr>
<td>Opportunity to support high school and college students become better prepared for their financial future</td>
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<tr>
<td>Opportunity to increase awareness of the value of pursuing a Financial Planning/Wealth Management Career</td>
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<tr>
<td>Acknowledgement as a sponsor on students’ Certificate of Achievement</td>
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<tr>
<td>Special recognition during opening remarks at a luncheon honoring top student plans</td>
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*Exclusivity available to first sponsor at 40% premium over standard cost.

To learn more about CFA Society Pittsburgh, visit our website at [www.cfapittsburgh.org](http://www.cfapittsburgh.org). For more information about sponsorship or other underwriting opportunities not outlined above, contact us at [info@cfapittsburgh.org](mailto:info@cfapittsburgh.org).