



SPONSORSHIP OPPORTUNITIES

Showcase your brand before a room full of engaged investment professionals by partnering with us!

EVENTS

Investment Strategy Dinner: January / February

LOCATION: Portland Art Museum

ATTENDANCE: 300+

PRESENTING SPONSOR (limit 1): \$6,000

- Gold Sponsor: \$3,000
- Silver Sponsor: \$1,500

Annual Meeting & Mixer Event: June

LOCATION: Gerding Theater at The Armory

ATTENDANCE: 60+

PRESENTING SPONSOR (limit 1): \$4,000

- Company logo engraved on wine glasses for event tasting (along with CFASP logo)
- Website presence for event
- Company logo projected at the event
- Speaking opportunity

Golf Tournament: September

LOCATION: Langdon Farms

ATTENDANCE: 70+

PRESENTING SPONSOR (limit 1): \$4,000

- Branded signage
- Website presence for event
- Opportunity for branded promotional item giveaway (towels, balls, tees, etc.)
- Speaking opportunity
- Six free players

HOLE SPONSORSHIP: \$500

- Table/tent at a hole
- Opportunity for branded promotional item giveaway (towels, balls, tees, etc.)
- Marketing material

Holiday Social: December

LOCATION: Portland City Grill

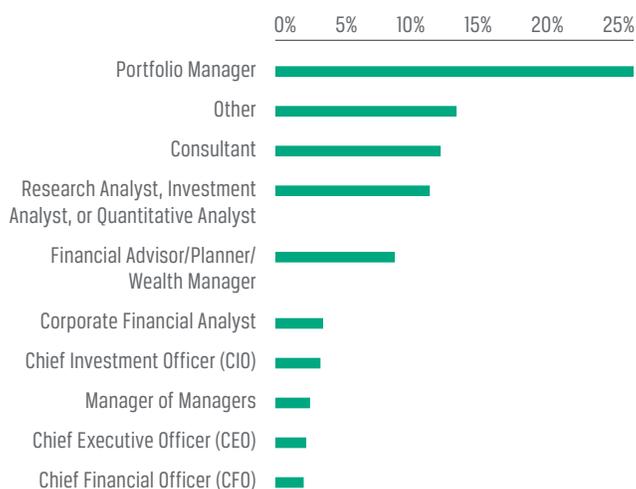
ATTENDANCE: 80+

EVENT SPONSORSHIP: \$4,000

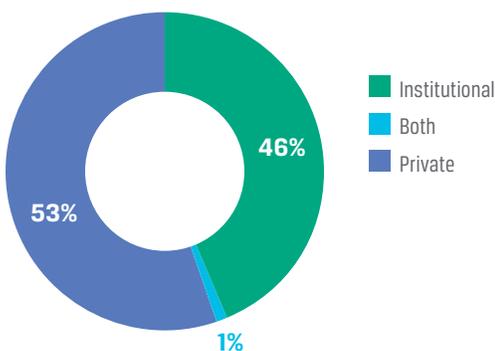
- Website presence for event
- Speaking opportunity
- Chance to mingle with new and existing Charterholders

MEMBER JOB FUNCTIONS

475+ Active Members



PRIMARY ASSET BASE



CONTACT FOR DETAILS
info@cfaportland.org



**CFA Society
Portland**

ABOUT CFA SOCIETY PORTLAND

CFA Society Portland is the preeminent association of investment professionals in Oregon. Consisting of portfolio managers, security analysts, investment advisors, consultants and other financial professionals, we promote ethical and professional standards within the investment industry; encourage professional development through the CFA Program and continuing education; facilitate the exchange of information and opinions among people within the local investment community and beyond; and work to further the public's understanding of the CFA designation and investment industry. As one of many CFA Institute member societies, our society connects members to a global network of investment professionals.

As an integral part of the local financial community, CFA Society Portland is committed to helping the next generation of investment professionals. We support and develop local students with scholarships, hands-on investment practice and industry connections. CFA Society Portland partners with Portland State University to allow MBA and senior-level finance students to manage CFA Society Portland's investment reserve portfolio and provides over a dozen annual scholarships to local universities. In addition, many society members volunteer their time serving on the boards of pension funds, endowments, charitable organizations and corporations to help them meet their fiduciary obligations to retirees and beneficiaries. Your support of CFA Society Portland helps further all these initiatives.

CFA SOCIETY PORTLAND BOARD MEMBERS

PRESIDENT: Ben Werner, CFA

VICE PRESIDENT/TREASURER: Andy Hoyt, CFA

PROGRAMS CHAIR: Lisa Massena, CFA

PUBLIC AWARENESS CHAIR: Chris Lakumb, CFA

MEMBERSHIP & EDUCATION CHAIR: Tyra Pratt, CFA

SECRETARY: Anthony Tursich, CFA

IMMEDIATE PAST PRESIDENT: Corrie Oliva, CFA

UNIVERSITY LIAISON: Piman Limpaphayom, CFA

ADVOCACY CHAIR: Kim Cash, CFA, CIPM, CAIA, CSCP



CFA SOCIETY PORTLAND BOARD MEMBERS

President

Corrie Oliva, CFA, has over 20 years' experience in the investment industry and currently works for Matisse Capital in Lake Oswego, Oregon advising retirement plan, endowment and foundation clients. She is experienced in all aspects of plan management with expertise in investment menu design, investment manager research, and portfolio construction. Corrie has been a member of CFA Society Portland and CFA Institute since 2003 and a member of the Board since 2012. Corrie currently serves as the President of the board. Corrie is also a member of the National Charity League, a national non-profit organization comprised of mother and daughter members in Chapters across the United States.

VICE PRESIDENT/TREASURER

Benjamin Werner, CFA, is a Senior Fixed income Portfolio Manager for Standard Insurance Company where he manages investment grade corporate and municipal bond portfolios. Ben has held previous positions conducting derivative-based hedging, doing mutual fund due diligence and conducting sell-side equity research. Ben joined CFA Society Portland's board in 2016 and currently serves as Vice President and Treasurer. Additionally, Ben serves on the board of directors for REACH Community Development, an affordable housing developer and manager in the Portland Metro area.

PROGRAMS CHAIR

Andy Hoyt, CFA, is Director of Finance and Strategy for Campbell Global, a timberland investment manager, where he is responsible for financial structure optimization, tax strategy, financial modeling, and performance calculation. Andy began his career in public accounting with Deloitte & Touche LLP, performing financial statement audits of both publicly traded and private companies. He is a Certified Public Accountant and a CFA Charterholder. He has been a board member of CFA Society Portland since 2017.

PUBLIC AWARENESS CHAIR

Lisa A. Massena, CFA, is a retirement leader partnering with states and governments to develop savings programs focused on increasing private sector retirement coverage. In 2020 Lisa founded Massena Associates to help clients successfully navigate this new space, achieving on-budget implementation, state of the art operations, and happy users. Services to support these outcomes include strategic advice on market position and opportunities; financial analysis; program design and development; implementation planning and support; issue expertise and testimony; marketplace updates and education; and communication services. Prior to establishing Massena Associates, Lisa served on the Government Savings team at Ascensus, the nation's largest independent recordkeeper, and as the founding Executive Director of the OregonSaves program. She has also held executive positions at State Street and mPower. Lisa has been a CFA Charterholder since 1994, and she believes it's one of the most empowering designations a person can get!



CFA Society Portland

CFA SOCIETY PORTLAND BOARD MEMBERS *continued*

MEMBERSHIP & EDUCATION CHAIR

Chris Lakumb, CFA, joined RiverNorth in 2009 and serves as a member of the portfolio specialist team. Chris is responsible for supporting the investment management team, serving as a liaison between the portfolio managers and the firm's investor base. Chris joined CFA Society Portland in 2019 and serves as the Director of Membership and Education. He has volunteered in various capacities at CFA Societies Chicago, San Francisco, and Portland since receiving his CFA Charter in 2005.

SECRETARY

Tyra Pratt, CFA, is a Business Analyst at Jensen Investment Management, where she conducts fundamental research for the Quality Value Strategy. Prior to Jensen, Tyra worked as a Hedge Fund Research Analyst at CTC | myCFO. Tyra became a CFA Charterholder in 2018 and joined the board in 2019.

UNIVERSITY LIAISON

Piman Limpaphayom, CFA, is a member of the finance faculty at Portland State University and has served as University Liaison for CFA Society Portland since 2011. He is also a member of the Advisory Board for CFA Society of Thailand. Piman's research focuses on corporate governance and firm value in Asia. He has worked on various consulting projects for international organizations (e.g., OECD, World Bank) and financial market regulators in Asia.

ADVOCACY CHAIR

Kim Cash, CFA, CIPM, CAIA, CSCP, is the Founder of Cascade Investment Compliance & Verification, a certified woman-owned consulting firm founded in 2017 to provide GIPS compliance consulting and independent verification and performance examination services to the investment industry. Kim is the 2019 Chair of the AICPA Task Force developing national guidance for CPAs conducting verifications in the U.S., and she became the Advocacy Liaison for CFA Society Portland in 2018. She has over 24 years of investment industry experience, including being Partner in a global CPA firm dedicated to investment industry engagements and Consultant and Chief Compliance Officer for RVK, Inc., a national consulting firm headquartered in Portland, Oregon. Kim is a member of Rotary International and the Rotary Club of Portland, where she serves on the Youth Exchange and Preserve Planet Earth Committees.