



# CFA Society San Diego

## ABOUT CFA SOCIETY SAN DIEGO

### OUR MISSION

The mission of the CFASDD is to serve the needs of professionals in the investment decision making process by providing a forum for the exchange of information and ideas among its members, by enhancing members' investment knowledge, and by encouraging high ethical standards and professional conduct among all participants in the investment industry.

### WHO WE ARE

The CFA Society San Diego was founded in 1962 as the Financial Analysts Society of San Diego, Inc. to promote a high standard of ethics and sound professional standards of investment management and research, and to enhance professional knowledge and skills. The Society was admitted to the Association for Investment Management and Research (AIMR) on November 4, 1963. In May 2004, AIMR became CFA Institute and in May 2005, the Society changed its name to CFA Society of San Diego (CFASDD), in order to more closely align with the CFA Institute and the Chartered Financial Analyst (CFA®) designation. Last year we changed our name to CFA Society San Diego and updated our logo to align with the CFA Institute's rebranding initiative.

There are over 450 members of the CFASDD, including security analysts, portfolio managers, bankers, and other investment professionals. Over 400 CFASDD members hold the Chartered Financial Analyst designation. In addition approximately 400 are currently candidates for this prestigious professional designation. CFASDD members work in diverse areas of finance and investment management, including institutional portfolio management, investment consulting, private wealth management, hedge funds, venture capital, corporate finance, academia and government.

### AMONG US:

- Over 180 members work for firms with more than \$1 billion under management
- Over 160 members are in leadership and investment decision-making roles
- Over 300 members have more than 10 years of industry experience
- Over 140 members manage institutional assets
- Over 100 members are in private wealth management

**For more information about the Society, please visit our website at [www.cfasociety.org/sandiego](http://www.cfasociety.org/sandiego)**

SHAPE  
THE  
FUTURE  
OF  
INVESTING



## CFA Society San Diego



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San Diego**

## **ABOUT OUR EVENTS & SPONSOR BENEFITS**

### **ANNUAL FORECAST DINNER (MARCH)**

This event began in 2007 and has quickly become a premier Forecast event for the Southern California investment community. On average, approximately 300 investment professionals, clients and guests from all over Southern California attend to enjoy an elegant dinner and world class speakers who share their views on the market environment and strategies.

#### **Previous speakers include:**

- Chris Thornberg — Principal, Beacon Economics
- Horacio Valeiras — Chief Investment Officer, Nicholas Applegate Capital Management
- David Goerz — Chief Investment Officer, Highmark Capital Management
- Thomas Lee — Chief Strategist, JP Morgan
- Howard Marks — Chairman, Oaktree Capital Management
- Tad Rivelle — Chief Investment Officer, Trust Company of the West
- Jeffrey Gundlach — CEO and Chief Investment Officer, DoubleLine Capital LP

### **ANNUAL SOCIAL/CHARTER AWARD CEREMONY (LATE OCTOBER)**

This ceremony brings the largest number of CFASDD members to a single event each year. As a social dinner hosted at a venue that provides a festive and entertaining atmosphere, members have the opportunity to interact with each other and enjoy one of the many cultural gems that San Diego has to offer. The evening is concluded with the CFA Charter Award Ceremony, where the new CFA Charterholders are awarded their designation and welcomed into the CFA Society San Diego.

### **SOCIETY-HOSTED MONTHLY LUNCHEON AND NETWORKING EVENTS (YEAR ROUND)**

Designed primarily to provide our membership with regular access to continuing education and thought leaders in the industry, our monthly luncheons offer presentations on a wide range of investment topics. The luncheons are typically held mid-week at an upscale hotel venue and have an average attendance of 50-75 members and non-member investment professionals.

#### **Sample of previous speakers include:**

- Dr. John C. Williams - President/CEO of the Federal Reserve Bank of San Francisco
- Dr. John Hofmeister - Member, U. S. Energy Security Council, Former CEO Shell Oil Company
- Jon Sundt - Founder, Altegris Advisors
- Glenn Carlson - Executive Director, Brandes Investment Partners
- Yin Luo, CFA - Managing Director, Deutsche Bank
- Kunal Ghosh - Senior Vice President, Portfolio Manager, Allianz Global Investors
- Robert S. Koenigsberger - Founder, CIO, Managing Partner Gramercy

The networking events are set in social environments optimal for networking and conversation. Examples of these events would include our Annual Summer Social and quarterly Book Club meetings as well as our CFASDD Afternoon at Petco Park. We will also be holding our second annual golf and networking event this spring and anticipate that it will continue to develop into our hallmark event.



## SPONSORSHIP OPPORTUNITIES & BENEFITS

	PLATINUM	GOLD	SILVER*
	\$10,000	\$7,500	\$5,000
	Limit 2	Limit 3	Limit 5
<b>CFASSD ANNUAL FORECAST DINNER</b>			
• Tables for 10 Guests	2-Front Row	1-Preferred	1-Preferred
• Sponsor Recognition in event Program	Full Page	Half Page	Logo
• Sponsor Recognition in event Print Advertising	✓	✓	✓
• Reception event Sponsor Marketing Table	✓	✓	✓
<b>CFASSD ANNUAL SOCIAL/CHARTER AWARD CEREMONY</b>			
• Table for 10 Guests	Front Row		
• Sponsor Recognition in event Program	✓	✓	
• Sponsor Recognition in event Print Advertising	✓	✓	
<b>CFASSD MONTHLY LUNCHEON/NETWORKING EVENTS</b>			
• Opportunity to give company presentation	1		
• Sponsor signage/logo display at events	2	1	
• Recognition as sponsor at designated level	2	1	1
<b>OTHER ADVERTISING BENEFITS</b>			
• Sponsor Recognition on CFASSD home page	12 Mo.	12 Mo.	6Mo.
• Sponsor Signage/Logo at Post CFA Exam Events	✓	✓	✓
<b>STUDENT MEMBERSHIP EVENTS</b>			
• Annual University 'Investment Challenge' program/print sponsor recognition	✓	✓	
• Sponsor Marketing table at Investment Challenge	✓	✓	
• Opportunity to give company presentation to CFASSD Student Membership	1		

### LUNCH SPONSOR – \$1,500 – LIMIT 4

- Sponsor table near registration table for marketing collateral/giveaways
- Sponsor signage/logo display at event projects on welcome presentation screen
- Recognition as Lunch Sponsor in emails to membership for specific event sponsored

\* Silver sponsors have the choice of sponsoring either the Annual Forecast Dinner or the Annual Social/Charter Ceremony. Both events include a Preferred table as well as all Sponsor Recognition benefits.





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## CFASSD SPONSOR REGISTRATION FORM

### SPONSORSHIP RESERVATIONS:

- \$10,000 Platinum Sponsor
- \$7,500 Gold Sponsor
- \$5,000 Silver Sponsor
- \$1,500 Lunch Sponsor

### PAYMENT OPTIONS:

- Check (Payable to CFA Society San Diego)
- Payment by wire transfer (CFASSD will contact you with details)

### FOR SPONSOR/TABLE RECOGNITION, PLEASE PRINT YOUR NAME AS YOU WISH TO BE RECOGNIZED:

- Name and Title:

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- Company:

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- Address:

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- Telephone:

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- Email:

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If you have additional questions regarding CFASSD sponsor opportunities please contact:  
[executivedirector@sandiego.cfasociety.org](mailto:executivedirector@sandiego.cfasociety.org)

Please fax form to 760-795-3445  
or mail to: CFASSD  
PO. Box 928456  
San Diego, CA 92192-8456  
Website: <http://www.cfasociety.org/sandiego>

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