



CFA Society
South Florida

ANNUAL SPONSORSHIPS

2020 - 2021

CFA Society South Florida is a 501(c)(6) non-profit organization that has more than 450 members. The Society, founded in 1971, serves the investment community and its members by promoting active participation in the Society and by providing useful tools to advance personal and professional development among members.

YOU'RE INVITED to **CONNECT** with influential investment managers and financial **DECISION-MAKERS** throughout the South Florida.

POSITION YOUR FIRM as an industry leader. **CULTIVATE RELATIONSHIPS** with key clients. **MAXIMIZE EXPOSURE** in the financial services industry.

A sponsorship places your firm in front of an **ELITE AUDIENCE** and aligns you with our society's mission to promote professional excellence and integrity in the financial profession.

BECOME A CFA Society South Florida **CORPORATE SPONSOR.**

BY THE NUMBERS

A SNAPSHOT OF CFASFL MEMBERS

400+ MEMBERS

90% of eligible members renew annually



TOP 5 EMPLOYERS



NextEra Energy, Inc.

Wells Fargo

Franklin Templeton Investments

Northern Trust

Polen Capital Management

CFA CHARTERHOLDERS

TOP POSITIONS

Portfolio Manager

Financial Advisor

Research Analyst

Financial Analyst

Consultant



AVERAGE AGE 47

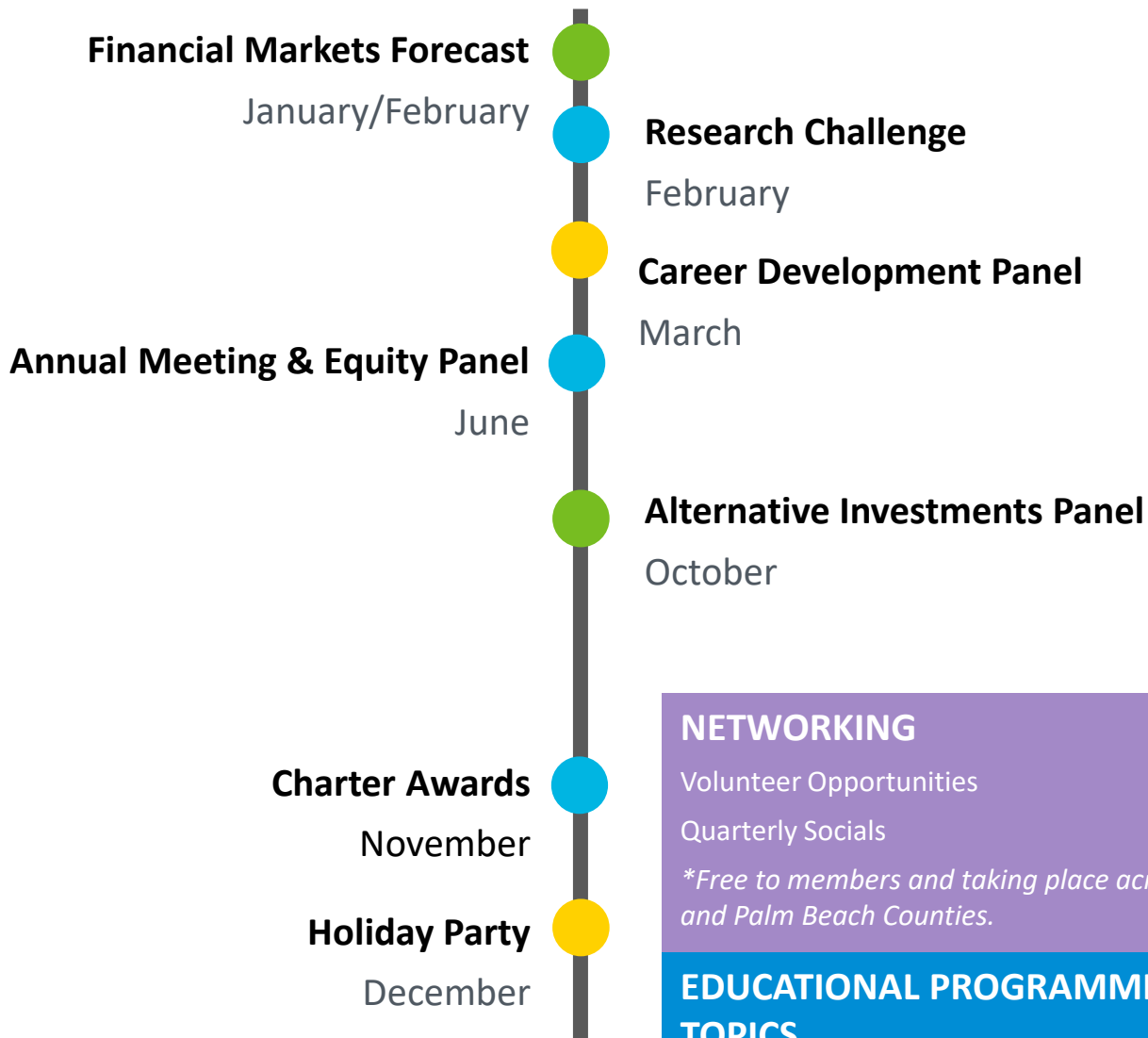


A majority of our members are in the peak season of their career and eager to connect.

BE RECOGNIZED

Build your credibility through your relationship with the premiere organization for investment professionals in South Florida. Our signature events are historically held in the following months but subject to change.

SIGNATURE EVENTS



NETWORKING

Volunteer Opportunities

Quarterly Socials

**Free to members and taking place across Broward and Palm Beach Counties.*

EDUCATIONAL PROGRAMMING TOPICS

Alternative Investments

Behavioral Finance

CFA Program

Information Sessions

Corporate Finance

Derivatives

Economics

Equity Investments

Financial Statement

Analysis

Fixed Income

Diversity & Inclusion

Leadership,

Management, and

Communication Skills

Performance

Measurement and

Evaluation

Portfolio Management

Private Wealth

Management

Quantitative Methods

Risk Management

Standards, Ethics, and

Regulations

Technical Analysis

CHOOSE YOUR SPONSORSHIP

Have an idea for an opportunity not listed on this page? Contact us to discuss.

SPONSORSHIP LEVELS				
	Platinum	Gold	Silver	Bronze
	\$10,000	\$5,000	\$2,500	\$1,500
Quantity Available	1	3	5	5
<i>Looking for special recognition not shown here? Let us know and we'll do our best to make it happen.</i>				
Logo Recognition				
Society website	Firm logo & link to website	Firm logo & link to website	Firm logo & link to website	Firm logo & link to website
Promotional materials (social, event calendar, and more) <i>Per sponsored event(s)</i>	Firm Logo	Firm Logo	Firm Logo	Firm Name
Quarterly Newsletter	Firm logo & link to website	Firm logo & link to website	Firm Logo	Firm Name
Named Sponsor for Signature Event(s)				
Quantity Available	3	1	1	NA
Named Sponsor for non-Signature Event(s)				
Quantity Available	4	2	2	1
Extra Perks				
CFA Society South Florida Membership <i>Local Only</i>	2	1	NA	NA
Opportunity to provide speaker at selected event(s) <i>Per sponsored event(s)</i>	•	•	•	•
Opportunity to provide branded items at signature event(s) and/or educational program(s) <i>Per sponsored event(s)</i>	•	•	•	•
Spotlight Job Listing(s) – <i>Newsletter or Targeted email</i>	4	3	2	1
Firm table at select event(s) <i>Per sponsored event(s)</i>	•	•	•	•

CONTACTS

To secure any of these opportunities and gain access to CFA Society South Florida investment professionals, please contact:

▶ **Judith Conmy**
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