



## A VALUABLE PARTNERSHIP OPPORTUNITY

Sponsorship of CFAW programs and events delivers increased exposure to a unique audience of nearly 2,000 investment professionals and aligns firms with CFAW's mission to promote best practices and the highest standards in the industry. We can *customize* benefits to your firm's specific needs.

### SPONSORSHIP BENEFITS (more details on next page)

- Make connections and generate leads for new business through face-to-face interaction with investment professionals and government regulators.
- Company logo linked to your website displayed on CFAW homepage and in monthly newsletter – distributed to over 2,000
- Great PR for your firm - enhances your market presence and brand awareness. Build credibility through your firm's association with a respected organization.
- Opportunity to launch new products and services to a targeted group of decision makers.
- Employment recruitment opportunities/job fairs.
- CFAW is a 501(c)(6) organization and contributions can be taken as a business expense.

### EVENTS

CFA Society of Washington holds over 40 events each year open to members and non-members in the Washington, DC investment community.

### EVENT HIGHLIGHTS:

- **Annual Dinner:** Our premiere networking event of the year. Brings together 300+ of Washington's leading investment professionals and key decision makers at a prestigious venue.
- **Annual Member Reception:** Networking opportunity that attracts 250+ members.
- **Annual Meeting:** A summer event with 100+ members.
- **Asset Allocation Panel:** Annual luncheon featuring local Chief Investment Officers
- **Holiday Party:** December reception with 150+ members.
- **Career events:** Panel discussion and job fair format for 70+ members
- **CFA Charter Award Reception:** Special evening of networking and celebrating new charterholder members, 100+ attendees.
- **Professional Education Programs:** 20-30 topical presentations and seminars a year, ranging from 30 to 200 attendees and attracting RIAs and other investment professionals.
- **Informal Networking Events:** Happy hours and group outings to local cultural and sporting venues. 50-100 members and guests.

### CURRENT & PAST SPONSORS

Artisan Partners  
Blackrock  
BlackRock/iShares  
BNY Mellon  
Brown Advisory  
Cambridge Associates  
Capital IQ  
Capstone  
CFA Institute  
Columbia Management  
Drexel Hamilton  
Duff & Phelps  
Eaton Vance  
EJF  
FactSet  
FI Consulting  
Fidelity  
John Hancock  
Lynx Investment Advisory  
MFS  
Morningstar  
NASDAQ  
Natixis Global Asset  
Management  
New Century Advisors  
Nuveen  
OppenheimerFunds  
Piedmont Fund Services  
Profit Investments  
Prudential  
Quadrangle Development  
RBC Global Asset Management  
Revenue Shares  
RH Smith School / UMD  
Sands Capital  
SBIA  
Strategic Investment Group  
SunAmerica  
TAMRO Capital  
TCW  
TIAA-CREF  
Touchstone  
Vanguard

# CFAW Sponsorship Opportunities

Sponsorship Type:	Annual Corporate Sponsors			Annual Dinner Sponsors					Other
	Gold	Silver	Bronze	Main Event	Cocktail/ Program/ Dessert/ Venue	Valet	Floral/ Wine	Table	Event Sponsor
Commitment	\$10,000	\$5,000	\$3,000	\$10,000	\$5,000	\$4,000	\$3,000	\$2,750	\$250 - \$1,500
Number available:	No limit	No limit	No limit	1	8	1	2	No limit	Varies
Logo and link on CFAW homepage	1 year	1 year	1 year	1 year	1 year	1 year	1 year		
Logo and link in monthly newsletter	✔	✔	✔	✔	✔	✔	✔		
Logo on display at professional education and networking events	✔	✔	✔	✔	✔	✔	✔		At event
Complimentary event registrations *	15 and 5 Annual Dinner	10	5	10 (Annual Dinner)	10 (Annual Dinner)	10 (Annual Dinner)	10 (Annual Dinner)	10 (Annual Dinner)	5
Opportunity to distribute brochures	✔	✔		At Annual Dinner	At Annual Dinner				At event
Sponsor name included in relevant press releases	✔	✔	✔	✔	✔	✔	✔	✔	✔
List of attendee names and employers	✔	✔	✔	✔	✔	✔	✔	✔	✔
Listing in Annual Dinner Program	✔	✔	✔	✔	✔	✔	✔	✔	
Reserved seating at event(s)	✔	✔		✔	✔	✔	✔	✔	✔
<b>Specific to Annual Dinner and/or Other Events:</b>									
Ad in specific event program				Full page	Half page	1/4 page			Varies
Opportunity to introduce speaker				✔					✔
Logo and link on specific event webpage				✔	✔	✔	✔	Link only	✔
Logo and link on specific event e-blasts				✔	✔	✔	✔	Link only	✔
Logo on name tags and other event collateral	✔								
Logo on display at specific event				✔	✔	✔	✔	✔	✔
Inclusion of promo items in gift bags				✔	✔	✔	✔	✔	
Additional name or logo display				Main hall	Reception area	Valet station	On tables		

**Contact:**

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Bill Scott (202) 872-4310 or [bscott@cfawashington.org](mailto:bscott@cfawashington.org)

**CFA Society of Washington, DC  
2016-2017 Sponsor Information Form**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

**I am interested in finding out about the following sponsorship opportunities:**

- Annual Corporate Sponsorships (Gold, Silver or Bronze)
- Annual Dinner Sponsorships
- CFA Charter Award Reception Sponsorship
- Annual Meeting Sponsorship (June)
- Annual Reception Sponsorship (September)
- Career Event Sponsorships
- Professional Education Program Event Sponsorships
- Informal Networking Event Sponsorships
- Golf Tournament Sponsorships
- In-kind donation of event space (please specify room capacity \_\_\_\_\_ )
- Other: \_\_\_\_\_

**I would like to reserve a sponsorship slot for the Annual Dinner.**

**I am interested in the following sponsorship(s):**

- Main Event Sponsor (\$10,000)
- Cocktail Reception Sponsor (\$5,000)
- Dessert Reception Sponsor (\$5,000)
- Program Sponsor (\$5,000)
- Venue Sponsor (\$5,000)
- Valet Sponsor (\$4,000)
- Wine or Floral Sponsor (\$3,000) - Please specify: \_\_\_\_\_
- Table Sponsor (\$2,750)  
Number of tables requested (10 seats per table): \_\_\_\_\_

*Please return this form by email to:*

**Bill Scott**

[bscott@cfawashington.org](mailto:bscott@cfawashington.org)