The CFAW Annual Dinner is the Society's most prestigious networking event of the year. It has become the “who’s who” event in the Washington, DC financial investment community and routinely brings together over 400 of the region’s leading investment professionals and key decision-makers.

Sponsorships will provide your firm important brand awareness and marketing, while also creating a chance to interact with the Society, attend an event, and learn firsthand what is valuable to the industry.

Whether you bring existing clients or come to meet new ones, ensure your firm is represented at this exclusive event!

**RESERVE YOUR SPONSORSHIP OPPORTUNITY**

- Diamond - $15,000
- Platinum - $10,000
- Gold - $8,000
- Silver - $6,000
- Bronze - $4,000
- Table - $3,000

See next page for benefits.

**Secure your spot today!**
bscott@cfawashington.org

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**KEYNOTE SPEAKER:**

**JOHN W. ROGERS, JR.**

John is chairman, co-chief executive officer, and chief investment officer of Ariel Investments, a Chicago-based firm he founded in 1983 which offers no-load mutual funds for individual investors as well as separately managed accounts for institutions and high-net-worth individuals.

As the first African-American founder of a major mutual fund company, John launched the firm’s flagship Ariel Fund more than 30 years ago, and still manages it today. Ariel Fund is the number-one ranked fund among its peer group since the market bottom that followed the Great Financial Crisis. It’s a testament to John’s “slow and steady” patient investment approach, staying focused, remaining true to his convictions, having a contrarian view and investing in great companies that have fallen out of favor. A disciple of Warren Buffett, John believes in being, “Fearful when others are greedy and greedy when others are fearful.” It’s also why John has been highlighted along with other legendary investors in the distinguished book: “The World’s 99 Greatest Investors.”

Beyond Ariel, John is a board member of McDonald’s, NIKE, The New York Times Company and serves as vice chair of the board of trustees of the University of Chicago. In 2008, John was awarded Princeton University’s highest honor, the Woodrow Wilson Award, presented each year to the alumni whose career embodies a commitment to national service.
MEMBER SNAPSHOTS

91% of all CFA Society Washington, DC members are CFA Charterholders.

MEMBER JOB FUNCTIONS:
- 17% Portfolio Manager
- 14% Other
- 13% Research Analyst, Investment Analyst, or Quantitative Analyst
- 12% Consultant
- 7% Corporate Finance Analyst
- 7% Risk Analyst/Manager
- 6% Financial Adviser/Planner/Wealth Manager
- 4% Manager of Managers
- 3% Investment Strategist
- 3% Accountant or Auditor

PRIMARY INVESTMENT PRACTICE:
- 26% Equities
- 22% Not Applicable
- 22% Fixed Income
- 9% Other
- 6% Real Estate
- 5% Private Equity
- 5% Structured Products
- 2% Derivatives
- 1% Hedge Funds
- 1% Venture Capital
- <1% Commodities

AUDIENCE INCLUDES:
- Leading asset managers
- Private wealth advisers
- Corporations
- Institutional investors
- Regulatory agencies, and
- International financial institutions

SPONSORS INCLUDE:
- Fund wholesalers
- Accounting firms
- Legal firms
- Fintech vendors
- Banks
- Consulting firms

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**SPONSORSHIP BENEFITS**

Benefit from our wide array of sponsorship benefits:

<table>
<thead>
<tr>
<th>Commitment</th>
<th>Diamond</th>
<th>Platinum</th>
<th>Gold</th>
<th>Silver</th>
<th>Bronze</th>
<th>Table</th>
<th>Friends of CFAW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available sponsorships at each level</td>
<td>1</td>
<td>2</td>
<td>8</td>
<td>5</td>
<td>5</td>
<td>Unlimited</td>
<td>Unlimited</td>
</tr>
<tr>
<td>Table(s) of 10 included in sponsorship</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Unlimited</td>
<td>Unlimited</td>
</tr>
<tr>
<td>Preferential table placement</td>
<td>Front Row</td>
<td>In Front</td>
<td>Near Front</td>
<td>Near Front</td>
<td>Forward</td>
<td>Forward</td>
<td>N/A</td>
</tr>
<tr>
<td>3 tickets included. Additional 2 tickets at 40% discount</td>
<td>N/A</td>
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<tr>
<td>Prominent display of firm name on table as a sponsor</td>
<td>•</td>
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</tr>
<tr>
<td>Firm name/logo promoted as a sponsor in event program</td>
<td>Firm Logo</td>
<td>Firm Logo</td>
<td>Firm Logo</td>
<td>Firm Logo</td>
<td>Firm Logo</td>
<td>Firm Name</td>
<td></td>
</tr>
<tr>
<td>Firm name/logo listed as a sponsor in pre-dinner slide show</td>
<td>10 - second Firm Logo</td>
<td>8 - second Firm Logo</td>
<td>Firm Logo</td>
<td>Firm Logo</td>
<td>Firm Logo</td>
<td>Firm Logo</td>
<td></td>
</tr>
<tr>
<td>Special recognition as a sponsor during opening remarks</td>
<td>By Name</td>
<td>By Name</td>
<td>By Name</td>
<td>By Name</td>
<td>General</td>
<td></td>
<td></td>
</tr>
<tr>
<td>List of attendee names and employers</td>
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<td>•</td>
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<tr>
<td>Firm logo in monthly Events Update</td>
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</tr>
<tr>
<td>Right of first refusal for 2021 Annual Dinner Sponsorship - current level or below (price subject to change; deadline to commit is 11/30/2020)</td>
<td>•</td>
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<td>Logo and link on event emails</td>
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</tbody>
</table>
| Logo and link on Annual Dinner webpage (before and after the event) | • | • | • | • 
| Full or Half Page Ad in Annual Dinner Program | Full page | Full page | Full page | Half page |
| Logo in weekly online Newsletter from commitment till event | • | • | • | • |
| Five (5) Complimentary Event Registrations for eligible CFA Society Washington, DC Professional Development programs (good thru August 31, 2020) | • | • | • |
| Illuminated firm logo (gobo) in a prominent area | • | • | • |
| 1-page marketing collateral distributed on chairs of non-sponsored tables | • | • |
| Sponsor recognition at the Cocktail Reception including table signage and signature cocktail | • | • |
| Automatic elevation to Corporate Partner status (with year-long brand recognition) | • | • |
| Sponsor recognition at the Cocktail Reception including bar signage and logo on napkins | • |
| Logo on event name tags and collateral | • |
| Opportunity to introduce the speaker | • |

*Bronze sponsorships are now sold out for the 2020 Annual Dinner.*

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- **Bronze Sponsor** $4,000
- **Table Sponsor** $3,000
- **Friends of CFAW** $1,000

SPONSORSHIP INFORMATION

Organization Name

Mailing Address

Primary Point of Contact and Title

Primary Point of Contact Phone

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- **Credit Card** (please call for card information)
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- **Check** included

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Bill Scott
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