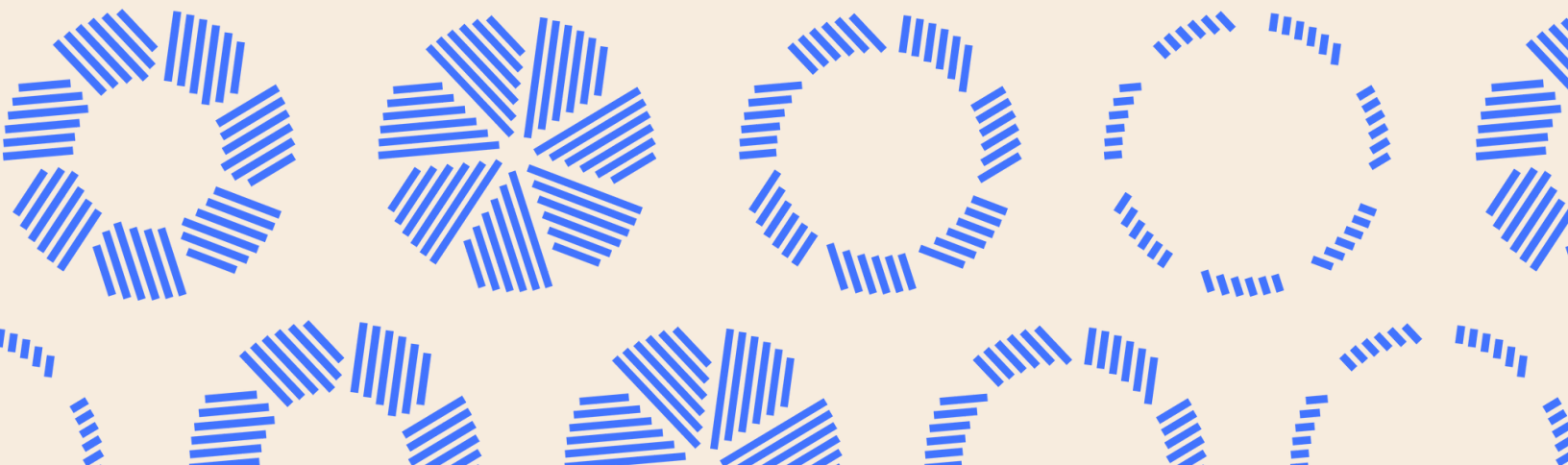




**CFA Society  
Nashville**

# **PARTNERSHIP OPPORTUNITIES**



# Who We Are

## CFA SOCIETY NASHVILLE'S 400+ MEMBERS

### TOP PROFESSIONS

- Chief Executive Officer
- Chief Financial Officer
- Chief Investment Officer
- Corporate Finance
- Financial Adviser, Planner
- Investment Analyst
- Investment Strategist
- Portfolio Manager
- Private Wealth Manager, Adviser
- Strategy Consulting

### TOP EMPLOYERS

- AllianceBernstein
- Barksdale Investment Management
- CAPTRUST
- Focus Partners Wealth, LLC
- Pinnacle Financial Partners
- State of Tennessee
- TCRS
- Truist Bank
- Truxton Trust
- UBS
- Vanderbilt University

CFA Society Nashville is the leading association of local investment professionals in Nashville, steeped in a rich history spanning over half a century. The non-profit organization has been serving Nashville and its surrounding cities since 1965. As a member society of CFA Institute, CFA Society Nashville connects its members to a global network of investment professionals that exceeds 150,000 investment professionals in more than 165+ countries and territories.

# 2026 ANNUAL FORECAST DINNER & CHARTERHOLDER RECOGNITION EVENT

Thursday, February 5, 2026

*The CFA Society Nashville 2026 Annual Forecast Dinner & Charterholder Recognition Event is our flagship event, bringing together 200+ members and friends of CFA Society Nashville.*



## FEATURING THESE PRESTIGIOUS SPEAKERS

**SPEAKER**



**Maya C. MacGuineas**

President

Committee for a Responsible Federal Budget (CRFB)

**SPEAKER**



**Jim Bianco**

President & Macro Strategist

Bianco Research, L.L.C

**MODERATOR**



**Richard Brink, CFA**

Senior Vice President & Market Strategist

AllianceBernstein

# 2025 - 2026 PARTNERSHIP OPPORTUNITIES

## ANNUAL FORECAST DINNER & CHARTERHOLDER RECOGNITION EVENT

**Platinum | \$15,000 | 1 available**

### Premium Annual Forecast Dinner Partner inclusions:

- Two reserved tables for (10 people at each table) at the event for guests and associates with logo displayed. Additional seats available at the member rate.
- Company logo on all event promotions, website, and social media
- Signage at the event with other partners
- Specialty logo'd dessert
- Opportunity to either introduce keynote speaker or have exclusive stage/podium signage – this would be in addition to the signage at event with other partners
- Attendance for two at the CFA Nashville Society Board Meet and Greet Happy Hour, an hour before the event starts
- List of attendees who opt-in to sharing their information

### Additional Benefits Throughout the Year:

- Two free CFA Nashville Affiliate Memberships for one year (estimated value is \$800), an application is required. Includes attendance to events (most of which are free), access to the latest research, continued professional learning content, member directory and exclusive volunteer opportunities
- One email blast distribution to membership – research-focused / promotion of upcoming event
- One month website spotlight as Corporate Partner
- Opportunity to provide speaker for a 2026 programming event (in-person or webinar)
- Six free 30-day free job postings



# 2025 - 2026 PARTNERSHIP OPPORTUNITIES

## ANNUAL FORECAST DINNER & CHARTERHOLDER RECOGNITION EVENT

**Gold | \$8,000 | 2 available**

### **Annual Dinner inclusions:**

- One reserved table (for 10 people) at the event for guests and associates with logo displayed. Additional seats available at the member rate.
- Company logo on all event promotions, website, and social media.
- Signage at the event with other partners.
- Attendance for two at the CFA Nashville Society Board Meet and Greet Happy Hour, an hour before the event starts. Branded napkins with other Gold Partners.
- List of attendees who opt-in to sharing their information.

### **Additional Benefits Throughout the Year:**

- Inclusion on preferred list of potential speakers for 2026 programming.
- One free CFA Nashville Affiliate Memberships for one year (estimated value is \$400), an application is required. Includes attendance to events (most of which are free), access to the latest research, continued professional learning content, member directory and exclusive volunteer opportunities.
- One mailing distribution to membership – research-focused / promotion of upcoming event.
- Three free 30-day free job postings.

# 2025 - 2026 PARTNERSHIP OPPORTUNITIES

## ANNUAL FORECAST DINNER & CHARTERHOLDER RECOGNITION EVENT

### Silver | \$5,000 | 5 available

#### Annual Dinner inclusions:

- 5 seats, additional available for purchase at the member rate
- Company logo on all event promotions, website, and social media
- Signage at the event with other partners
- Attendance for two at the CFA Nashville Society Board Meet and Greet Happy Hour, an hour before the event starts
- List of attendees who opt-in to sharing their information

#### Additional Benefits Throughout the Year:

- One mailing distribution to membership – research-focused / promotion of upcoming event
- Three free 30-day free job postings

### Bronze | \$2,000 | 8 available

#### Annual Dinner inclusions:

- 1 seat, additional available for purchase at the member rate
- Company logo on all event promotions, website, and social media
- Signage at the event with other partners
- Attendance for two at the CFA Nashville Society Board Meet and Greet Happy Hour, an hour before the event starts
- List of attendees who opt-in to sharing their information



# 2025 - 2026 PARTNERSHIP OPPORTUNITIES

## GREATER TENNESSEE RESEARCH CHALLENGE

**\$5,000 | 1 available**

The CFA Institute Research Challenge is an annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis and professional ethics. Each student will be tested on their analytical, valuation, report writing, and presentation skills. They gain real-world experience as they assume the role of a research analyst.

Local level competitions are organized and judged by CFA Institute society members and volunteers who function as local hosts. For the past several years, CFA Society Nashville has partnered with CFA Society East Tennessee to host the challenge for a Tennessee-based company. Students spend months analyzing the target company and writing a report. The local challenge culminates with a presentation to a panel of judges hosted in downtown Nashville.

The winning university team from each local competition advances to the sub-regional competition, and eventually, regionals, and the Global Final, where one team emerges as the global champion.

To learn more about the Research Challenge, click [here](#).

### **Exclusive partner of the February Event inclusions:**

- Company logo on all event promotions, website, and social media
- Signage at the event
- Resume Book of Student Participants
- Lunch with Judges / Volunteers
- Attendance at Reception for 5 guests
- One-year free job postings



# 2025 - 2026 PARTNERSHIP OPPORTUNITIES

## HOST AN EVENT

BREAKFAST \$1,500 OR LUNCH \$3,000

- Recognition in event communications
- Welcome sign with your logo
- 5 minute welcome remarks
- Provide info to be distributed on each guest chair
- Attendee list (for those who opt-in to sharing their name/company)
- ADD ON: Provide a speaker with a 45-minute time slot for an additional \$2,000

## HOST A HAPPY HOUR

HAPPY HOUR \$1,500

- Recognition in event communications
- Welcome sign with your logo
- 5 minute welcome remarks



CFA Society Nashville would like to extend its deepest gratitude to the 2025 Annual Forecast & Charterholder Recognition Dinner sponsors.



CARLYLE

DIAMOND HILL  
INVESTED IN THE LONG RUN

Janus Henderson  
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# THANK YOU

CFA Society Nashville appreciates your support and consideration of a partnership.

As a corporate partner, you bolster our efforts to build a strong, vibrant investment community in Middle Tennessee.

We invite each of you to attend our events and get to know our audience. We welcome participation and a sharing of ideas on how to best reach our mutual goals.

Your support allows the Society to achieve our goals of becoming a widely respected and highly valued organization in the community. Our strategic priorities are to:

- Provide professional learning opportunities and member networking events,
- Engage our community and increase awareness among local institutions and universities, and to
- Support CFA Program candidates through their journey.

For more information, please contact Angie Brown at [angie@cfanashville.org](mailto:angie@cfanashville.org).