5th Annual

Southeastern US Region Leadership Conference Sponsorship Brochure



April 22 - 24, 2026

Virgin Hotels Nashville

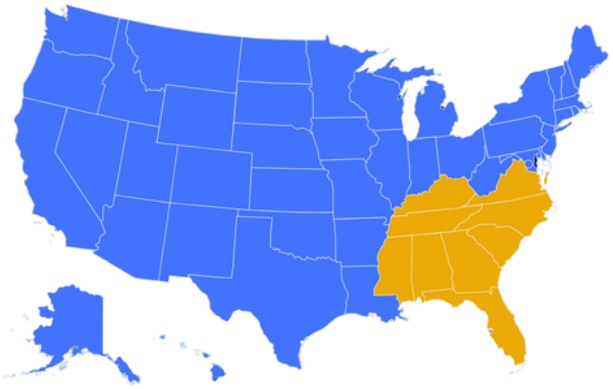


Knowledge. Connection. Trust.

From April 22 to 24, 2026, CFA Society leaders from across the Southeastern US will gather at Virgin Hotels Nashville for an engaging regional conference. Attendees will network, exchange ideas, and share best practices to strengthen the value they deliver to their members.

As a conference partner, you'll have the opportunity to connect directly with influential volunteers and leaders in the investment profession. Strengthen your relationships across the region, increase your organization's visibility, and position your brand as a trusted resource for local societies. Attendees are eager to collaborate with partners who can help them find innovative solutions, making this a valuable opportunity to build lasting connections that extend beyond the event.

About Our Region



7,580 total members

16 societies

13% of membership in US

19%
Portfolio Managers

26%
Institutional Assets

28%
Private Assets

Participating Societies

Alabama
Atlanta East
Tennessee
Jacksonville
Louisville
Memphis
Miami
Mississippi
Naples
Nashville
North Carolina
Orlando
South Carolina
South Florida
Tampa Bay
Virginia

Top Employers

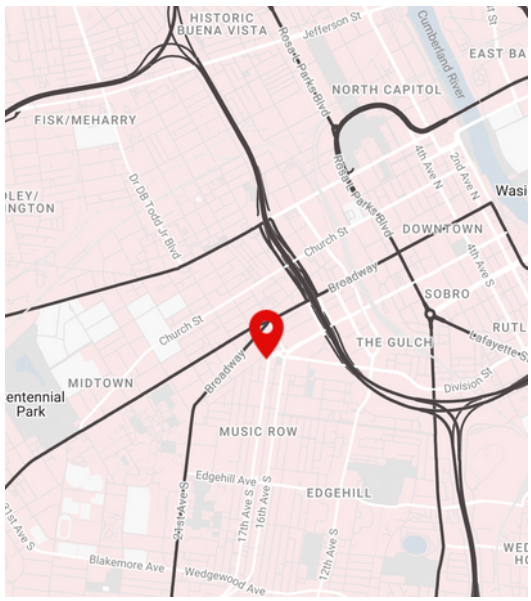
Wells Fargo
Bank of America
Raymond James
Truist Financial Corp
Morgan Stanley
Voya Investment
Invesco Ltd
JP Morgan Chase
UBS
Northern Trust
TIAA-CREF
Regions Financial Corp
BlackRock
PNC Financial
First Horizon
Marsh & McLennan
Mass Mutual
AllianceBernstein
Goldman Sachs
Ernst & Young



Overnight Accommodations

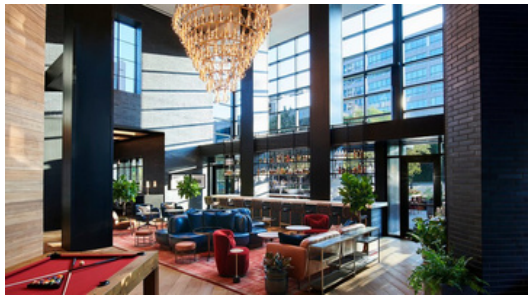
Virgin Hotels Nashville
1 Music Square W
Nashville, TN 37203
(615) 667-8000

Located in the heart of Nashville's Music Row, minutes from The Gulch and Downtown Nashville, Virgin Hotels Nashville is a luxury boutique hotel you're just steps away from all the sights, sounds and tastes that make this vibrant city a 'must visit' destination. So, drop off your bags, get dolled up in our chambers, and enjoy a taste of southern hospitality at its finest.



Parking
Valet parking is available at the hotel. Paid street parking is available but is not managed or maintained by the hotel.

Convenient Location
The Virgin Hotel is just 20 minutes' drive from Nashville International Airport.





Book Your Room by March 23

Use the CFA Room Block and SAVE!
Room rate per night is $299.00/night

Conference at a Glance

Wednesday, April 22, 2026	
3:30 - 5:30 PM	**Pre-Conference Workshop for Society Executives** *Producers' Circle: What makes a track a hit?* Hands-on workshop for Society executives and staff to fine-tune operations, align leadership, and prep for the next tour. Includes Hot Topics wall and brand roster builder.
	Sponsor Table Set-up
6:00 - 8:00 PM	**Welcome Event: Open Mic & Meet the Band** Kick off the conference with light bites, walk-up songs, and music-themed mingling at the Virgin Hotel. Play a round of music bingo and connect with your bandmates before the first downbeat.
Thursday, April 23	
8:00 AM - 4:30 PM	**Day 1 of Conference Sessions** *Laying Down the Tracks* Day 1 is designed to filler text here filler text here filler text here. Filler text here filler text here filler text here. Filler text here filler text here filler text. here.
5:30 PM	**Backstage Pass: The Nashville Session** Tonight, we go off-script. Join your fellow Society leaders for an experience featuring food and fun. This is is where connections go deeper and memories get made.
Friday, April 24	
8:00 AM - 12:00 PM	**Day 2 of Conference Sessions** *Encore and Exits* Hands-on workshop for Society executives and staff to fine-tune operations, align leadership, and prep for the next tour. Includes Hot Topics wall and brand roster builder.

Sponsorship Benefits	Title	Gold	Silver
Opportunities Available	1	6	6
Pre-Conference Benefits			
Pre event attendee communications and social media recognition	Logo	Logo	Logo
Pre-Conference attendee list with USPS mailing address, email address for one-time use as outlined in Data Usage Agreement (Information provided on an opt-in basis)	X	X	X
Recognition on conference registration page	X	X	
Conference Benefits			
Speaking Opportunity	Keynote	Showcase	
6' covered and draped exhibit table with two chairs (electricity available upon request)	X	X	X
On-site recognition including logo on slides played during breakfast, intermission between sessions, and luncheon with attendees	X	X	X
Recognition on registration tote bag	X	X	X
Conference registrations	3	2	1
Post-Conference Benefits			
Post-conference attendee list with USPS mailing address, email address for one-time use as outlined in Data Usage Agreement (Information provided on an opt-in basis)	X	X	X
Promotion of any CE conference | event your company is offering via separate email to membership and social media promotion	2x	1x	
Participate as CFA Southeastern US Region Distinguished Speaker Series (virutal session)	1		
Cost	$7,500	$5,000	$2,500

Interested? Please click here to fill out our sponsorship form.

RULES AND REGULATIONS

for the 2026 CFA Societies Southeastern US Regional Leadership Conference

Force Majeure In the case of cancellation of the 2026 CFA Societies Southeastern US Regional Leadership Conference, or unavailability of the meeting or exhibit space, due to Acts of God, war, threats or acts of terrorism, governmental authority, fire, strike, labor disputes, or any other cause beyond the control of the Conference Planning Committee (COMMITTEE), this agreement shall terminate, and the Committee shall not be responsible for any damages or expenses incurred by the sponsor or exhibitor in connection therewith.

Conference Reschedule, Cancellation, Provide Content Virtually All sponsor commitments are non-refundable. If for any reason, the in-person Conference does not take place, the COMMITTEE will:

- Hold the conference virtually on the same day, or series of days, or
- Attempt to reschedule as an in-person event within 90 days

Assignment of Exhibit Space Assignment of space will be determined by the COMMITTEE onsite conference coordinator which will accommodate a tabletop exhibit or an arrangement of a similar proportion. All exhibits may conform to the size of the space provided and must not obstruct or interfere with the operations of the conference.

Character of Exhibits Sponsors will provide a skirted table and two chairs. Sponsors will be responsible for monitoring their own designated areas and will carry their own insurance. The sponsor is responsible for all other necessary equipment for its exhibit table including shipping and drayage. Sponsors with audible electric devices, videos and other exhibits or devices, which might prove objectionable to other sponsors, may be required to accept table assignments that diminish reasonable objections. Free Wi-Fi access is available via the Virgin Hotel. Electricity is available to most exhibits. If electricity is needed, please indicate it on the sponsor information form.

Gifts and Drawings Each sponsor will be responsible for any gifts or drawings and such arrangements will be confined to sponsor's designated area unless previous arrangements have been previously made with the onsite conference coordinator.

Distribution of Printed Material Advertising materials/collateral may only be distributed from the sponsor's designated area and may not be placed on meeting room seats or tables unless otherwise noted as part of the sponsorship benefits.





Food and Beverage The COMMITTEE will offer each sponsor the same food and beverage provisions conference participants receive, based on number of representatives included in sponsor level.

Compliance These instructions and regulations have been formulated for the best interest of the sponsor. Failure to comply may result in removal of an exhibit or cancellation of a sponsorship with no refund of fees to the sponsor/exhibitor.

Dismantling No exhibit may be dismantled until the time noted within the final sponsor/exhibitor kit unless agreed upon by the COMMITTEE onsite coordinator and the sponsor.

Insurance & Liability Sponsor/exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, defend, and save Virgin Hotel, COMMITTEE Members, its employees, and participating Society board of directors harmless against all claims, losses and damages to persons or property, governmental charges or fines and attorney's fees arising out of or caused by Exhibitor's transportation, installation, removal, maintenance, occupancy, display or use of exhibits, or of the exhibition premises or a part thereof, excluding any such liability caused by the sole negligence of the Virgin Hotel, COMMITTEE Members, its employees, and participating Society board of directors.

Mailing List Pre-Conference Electronic list of registered attendees who have opted in to receive communications from sponsors will include only physical addresses and e-mail addresses. The Pre-Conference list will be provided to Sponsors entitled to such list two weeks (April 8) prior to the start of the conference. This list is provided for the sole purpose of contacting conference attendees to inform/promote Sponsor attendance at the conference. The list is provided for one-time use (pre-Conference) and may not be duplicated or entered into a database. Please see below for a full copy of the Mailing List Usage Policy.

Post-Conference Electronic list of attendees who have opted in to receive communication from sponsors will include only physical addresses and e-mail addresses. The electronic list is provided for the sole purpose of thanking attendees for their attendance at the Conference. The list is provided for one-time use (post-Conference) and may not be duplicated or entered into a database. Please see below for a full copy of the Mailing List Usage Policy.

Property Damage Sponsors/Exhibitors are responsible for damage to property. No signs or other articles shall be posted, nailed, or otherwise attached to any of the pillars, walls, doors, floors, etc., in such a manner as to deface or destroy.

MAILING LIST USAGE POLICY

All sponsors entitled to mailing list usage will receive one pre and one post-Conference list of attendee addresses (physical address and e-mail address) for use in promoting their attendance at the annual Conference (pre-Conference contact) and to thank the attendees for their attendance at the Conference (post-Conference contact). By accepting delivery of each list, the sponsor agrees to the terms outlined below. Sponsor may use attendee names and addresses for an approved use one time only (one pre-Conference contact and one post-Conference contact). Attendee names and addresses may be used only for mailing purposes (physical or electronic delivery only) and may not be used for telephone or personal contact. CFA Society names or logos may not be used on any material mailed by user. The sponsor may reference their attendance at the "CFA Societies Southeastern US Region Leadership Conference." Sponsor will not copy, replace, or duplicate the names and addresses or any portion thereof or extract or retain any information there from. Sponsor will not at any time permit any attendee names and addresses to pass into the hands of any other person, association, organization, or company. Any post-Conference mailing must take place within sixty (60) days of receipt of the list. Sponsor will hold the COMMITTEE harmless against any damages or claim of damage, costs and reasonable attorney fees, arising out of any actual or alleged impropriety or illegality of mailed matter or infringement of trademark, trade name, or copyright belonging to others. Sponsor agrees to forward within thirty (30) days following receipt, any letters or other documents (or copies thereof) containing complaints by attendees regarding the sponsor's mailing, the matter transmitted therein, or the offered product or service. Sponsor is solely responsible for determining that the information provided is sufficiently accurate for the sponsor's purposes.

I have read and will abide by the conditions set forth, which the undersigned applicant agrees is part of this sponsorship agreement.

Authorized Signature Title Date

Please return this completed and signed document to:
Claire Hudson with CFA Society Nashville, claire@cfanashville.org

CFA Societies Southeastern Region Leadership Conference 2026 Essential Information

Shipping Exhibits & Packages

Support equipment and materials may be delivered to the conference sight no more than three (3) days prior to your program and unloaded at the building's loading dock. Please coordinate storage and delivery needs with Virgin Hotel staff. Staff can assist you with loading and unloading as needed. To ensure proper handling of your materials, shipping labels must include the following:

Southeastern US Region Leadership Conference
Angie Brown
Event Date: April 22-24, 2026
ATTN: Sheryl Karrip
1 Music Sq W, Nashville, TN 37203

If sending multiple boxes, please mark boxes accordingly i.e., 1 of 3, 2 of 3, 3 of 3.

Exhibit Assignments & Services

Exhibit location is determined by the sponsorship level.

Check-in at the Conference Registration Desk at 7:30 AM on April 2nd for your assignment. Standard exhibit includes one (1) six-foot covered and skirted table and two chairs.

If your exhibit requires electric, please notify Angie Brown to arrange

Complimentary Wi-Fi is available.

Parking

Valet parking is available through the hotel

Timeline

Feb 25 — Company Logo (all sponsor levels)

- Logos in both horizontal and vertical format png, gif, jpg (preferred)

Company Description

- 75-word max for Gold
- 50-word max for Silver

Speaker photo and bio to help promote your session.

Session description and outline or presentation materials. We will be making extended continuing education applications and want to be sure your session is included for maximum impact.

Feb 25 — All payments should be received

April 17 — Packages & Exhibits can arrive at

Southeastern US Region Leadership Conference
Angie Brown
Event Date: April 22-24, 2026
ATTN: Sheryl Karrip
1 Music Sq W, Nashville, TN 37203

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Apr 22 — 6:00 PM Welcome Reception

Apr 23
7:30 AM Display Set-up
7:50 AM Sponsor Orientation
8:00 AM Registration & Coffee
8:00 AM Welcome & Announcements
8:00 AM Morning Sessions Begin
12:00 PM Luncheon with Attendees
1:00 PM Afternoon Sessions Begin
4:30 PM Session Conclude
5:30 PM Evening Event

Apr 24
8:00 AM Networking Breakfast
8:00 AM Morning Sessions Begin
12:00 PM Conference Concludes
Grab and Go Lunch