



"Position your firm as an industry leader. Cultivate relationships with key clients. Maximize your exposure in the financial services industry.

Become a CFA Society Cleveland corporate sponsor.

Choose a sponsorship package that maximizes your return on investment, no matter your budget size. Sponsorship puts your firm in front of an elite audience and aligns you with our society's mission to promote best practices and the highest ethical standards in the industry.

You're invited to connect with influential investment managers and financial decision-makers throughout Northeast Ohio.

[Read on to learn more."](#)



Members

400+

Members, 95% with
CFA Designation



Email Subscribers

3000+

Recipients



Average Age

41

Years Old



Top Positions

- Portfolio Manager
- Wealth Manager
- Analyst
- Investment Consultant
- Corporate Finance



Signature Events

We will hold a signature event in March, July, and October in 2025. Signature events are our attempt to highlight the best of what Northeast Ohio has to offer and maximize the interaction with investment professionals in the area. In March, we have scheduled a prominent local private equity professional. In July we will hold our Annual Golf Outing at Canterbury Country Club. In October, we will hold our Annual Chief Investment Officer Roundtable. Signature events often attract 70+ attendees and are our marquee events for the year.



Monthly Socials

Monthly socials are free networking events that happen in alternative locations in NE Ohio. We rotate event locations to reach all members on the Eastside, Westside, Downtown, and South/Akron. These events give our members a change to informally engage with their peers to increase connections for their personal professional networks.



Professional Learning

Professional learning can take place in many forms and we aim to meet our members where they are. We offer monthly lunches held downtown at the Union Club, periodic small group breakfasts and lunches with asset management firms and local public companies, and virtual learning opportunities on topics relevant to our members.



Guardians of Finance Podcast

The Guardians of Finance podcast is produced by CFA Society Cleveland with the goal of increasing the connections of our investment community and learning about the people, events, projects, and firms that are making a difference in Northeast Ohio. We do this with a ~30 minute podcast that listeners can download on a biweekly basis. 2023 was our first year producing the podcast and it was a resounding success.



Recruiting & University Engagement

CFA Society Cleveland has active engagement with universities and job seekers in Northeast Ohio. We hold an annual Research Challenge that is paired with our signature recruiting event for employers looking to hire the top talent in the region, our job board is the go-to place for financial professionals looking for a new opportunity, and we also have dedicated appointed liaisons to for every college and university in our area.



2024 Recap

1000+

Event registrations

14

Guardians of Finance podcast episodes with over 1800 downloads

39

Events held

- 12 Networking events
- 17 Professional learning events
- 3 dedicated events for our women's group
- 3 events dedicated for students
- 4 events dedicated to CFA candidates and young professional

Partnership Opportunities

Diamond Partner - \$15,000 (1 Available)

Monthly Speaker Lunches:

- Reserved table for 8 at the event for guests and associates
- Top billing of company name and logo in the event program
- Company logo on all event promotions, website, and social media
- Signage at event
- Option to nominate 1 event speaker or moderator (can be converted to eastside/westside presentation)

CIO Roundtable Signature Event:

- 2 reserved tables for 8 at the event for guests and associates
- Top billing of company name and logo in the event program
- Company logo on all event promotions, website, and social media
- Signage at event

Annual Golf Outing:

- Complimentary hole sponsorship
- Guaranteed four-some

Guardians of Finances Podcast:

- Firm name mention at the beginning of every episode
- Ability to have NE Ohio associated guest on podcast

Additional Benefits:

- 10 free society membership for non-CFA members
- 5 job board postings

Gold Partner - \$10,000 (3 Available)

Monthly Speaker Lunches:

- Reserved table for 8 at the event for guests and associates
- Name and logo in the event program, website, and emails
- Signage at event
- Option to nominate 1 event speaker or moderator (can be converted to eastside/westside presentation)

CIO Roundtable Signature Event:

- 1 reserved table for 8 at the event for guests and associates
- Name and logo in the event program
- Company logo on all event promotions, website, and social media
- Signage at event

Annual Golf Outing Signature Event:

- Complimentary hole sponsorship
- 1 guaranteed four-some

Guardians of Finances Podcast:

- Ability to have NE Ohio associated guest on podcast

Additional Benefits:

- 5 free society membership for non-CFA members
- 3 job board postings

Local Partner - \$5,000 (10 Available)

Monthly Speaker Lunches:

- Name and logo in the event program, website, and emails
- Signage at event

Monthly Happy Hour:

- Ability to host 1 monthly happy hour
- Name and logo in promotional emails

CIO Roundtable Signature Event:

- 2 reserved tables (8 guests each table) at the event for guests and associates
- Name and logo in the event program
- Name and logo on all event promotions, website, and social media
- Signage at event

Annual Golf Outing:

- Complimentary hole sponsorship
- 1 guaranteed four-some

Guardians of Finances Podcast:

- Ability to have NE Ohio associated guest on podcast

Additional Benefits:

- 10 free society membership for non-CFA members
- 1 table with signage at Research Challenge/Investing in Your Career annual event
- 1 job posting

Asset Manager Partner - \$5,500 (10 Available)

Eastside/Westside Breakfast & Lunch Presentation:

- 1 featured presenter for breakfast and lunch combination event
- Name and logo in the event program, website, and emails
- Signage at event

Monthly Happy Hour:

- Ability to host 1 monthly happy hour
- Name and logo in promotional emails

CIO Roundtable Signature Event:

- 1 reserved table at the event for guests and associates
- Name and logo in the event program
- Name and logo on all event promotions, website, and social media
- Signage at event

Annual Golf Outing:

- Complimentary hole sponsorship
- 1 guaranteed four-some

A La Carte Sponsorships:

- Monthly Lunch Sponsorship: \$3,000
- Eastside/Westside Breakfast & Lunch Presentation: \$2,500
- Monthly Happy Hour Sponsorship: \$1,000
- Table at Annual CIO Roundtable: \$1,000
- Additional Annual Golf Outing sponsorships available on request