



**CFA Society
Hartford**

**NEW
SPONSORSHIP
OPPORTUNITIES
INSIDE!**

2026 Annual Forecast Event

Connecticut Convention Center
February 12, 2026
5:00 PM - 8:30 PM

SPONSORSHIP OPPORTUNITIES



Event Overview

Join us for a 2026 Global Economic Forecast by keynote speaker Gene Goldman, CFA.

2026 Annual Forecast Event

February 12, 2026

Connecticut Convention Center 5:00 PM - 8:30 PM

Join us at the 2026 Annual Forecast Dinner hosted by CFA Society Hartford, featuring esteemed speaker Gene Goldman, CFA. This premier event will bring together Connecticut's leading investment professionals and key decision-makers for an evening of insight and networking. Established in 1954, CFA Society Hartford represents a network of over 700 investment management professionals dedicated to promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of our community.

Sponsorship Opportunities provide firm exposure at the Annual Forecast Event and on the Society website, as well as networking opportunities to engage our members and guests throughout the year at periodic luncheons and conferences hosted by the Society.

Sponsorships start at \$650.00

AGENDA

5:00 PM

Networking | Social Hour | Exhibitors

5:15 - 5:30 PM

Private Meet & Greet with Keynote Speaker*

6:00 PM

Dining Room Opens

6:15 PM

Dinner Served

6:30 PM

New CFA Charterholder Ceremony

6:45 PM

Welcome

Guest Speaker

Erick Russell, Connecticut State Treasurer

Keynote Speaker

Gene Goldman, CFA

Chief Investment Officer & Director of Research

Cetera Investment Management





**CFA Society
Hartford**



Keynote Speaker

Gene Goldman, CFA
Chief Investment Officer & Director of Research
Cetera Investment Management

Gene Goldman is responsible for the strategic direction and continued growth of the firm's research offerings. Gene has more than 33 years of experience in the development of investment strategies, money manager research and overseeing investment analysts.

He is frequently cited in a range of national media outlets including The Wall Street Journal, Bloomberg News, The New York Times, Forbes, CNN, and Reuters and he is a regular guest on high-profile news networks including CNBC and Fox Business News.

Mr. Goldman earned his Bachelor of Science in engineering from Worcester Polytechnic Institute and his Master of Business Administration with a concentration in finance from Northeastern University. He is a Chartered Financial Analyst® (CFA).

Guest Speaker

Treasurer Erick Russell
Connecticut State Treasurer

Born and raised in New Haven, Russell adopted the work ethic and financial responsibility of his parents by working in the family's small convenience store. He would become the first in his family to graduate college, earning a bachelor's degree from the University of New Haven. Russell continued his education at the University of Connecticut School of Law. He interned with the Connecticut Legal Rights Project and the administration of Connecticut Gov. Dannel Malloy. After law school, Russell joined the prestigious Connecticut law firm of Pullman & Comley where he was a partner in the firm's Public and Private Finance Group.



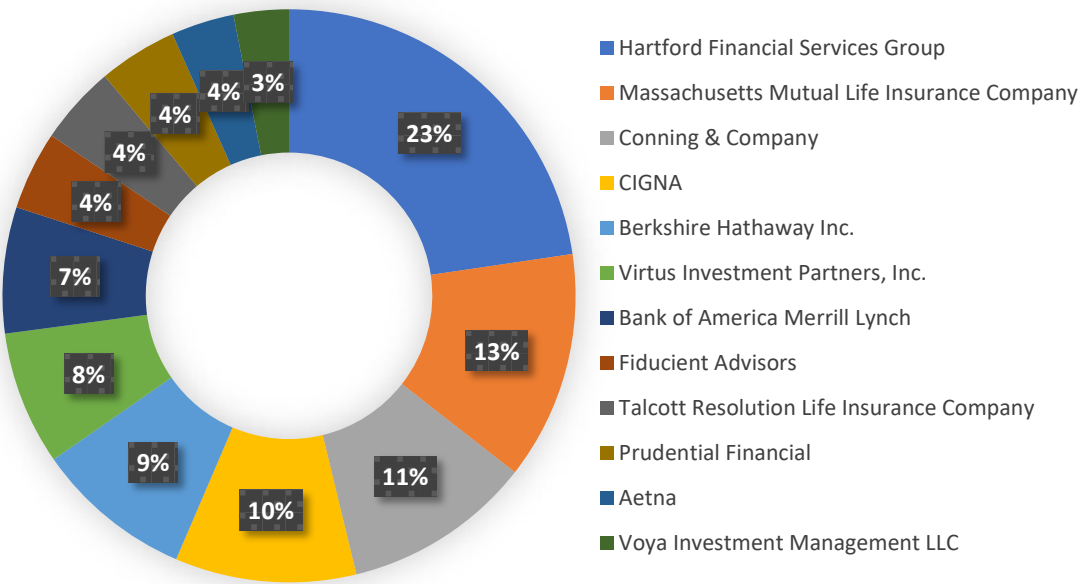
Erick Russell was sworn in as Connecticut's 84th State Treasurer on January 4, 2023. He is currently serving his first term.

ABOUT | CFA Society Hartford

CFA Society Hartford is one of the leading associations of local investment professionals in Connecticut, steeped in rich history spanning over 70 years. The non-profit organization has been serving Connecticut since 1954.

TOP EMPLOYERS | CFA Society Hartford Members

The Society's membership is well represented in all the leading financial institutions in the area

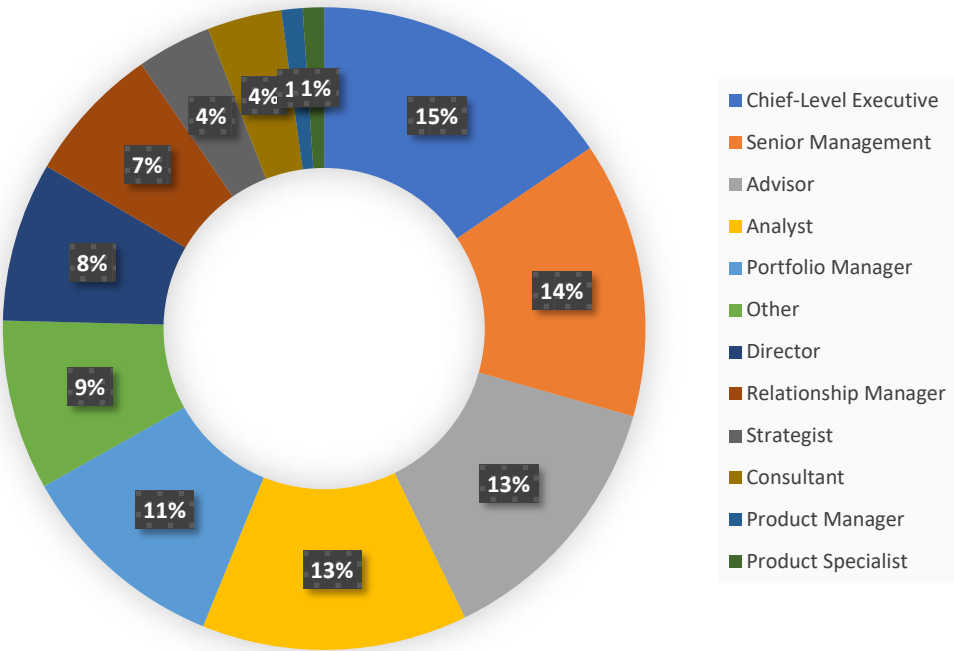


DEMOGRAPHICS | Attendees

The attendee profile reflects aggregate data from the past five Annual Forecast Events.

383 | Average Investment Professional Attendees

Attendee Occupation



SPONSORSHIP Contacts

To secure sponsorship opportunities and gain access to investment professionals attending the Annual Forecast Dinner, please contact:

Rebecca Taylor
administrator@hartfordcfa.org
(860) 604-1411

Ian Green
Forecast Dinner Chair

SPONSORSHIP | Opportunities

All benefits are dependent on the Sponsor providing the required materials and information prior to deadlines.

	Platinum \$10,000	Gold \$5,750	Silver \$3,550	Bronze \$2,550	SWAG \$2750	Social Hour \$2750
Number of Sponsorships available at each level	2	10	12	15	1	2
Pre-Event Benefits						
Pre-event marketing on website, Social Media channels, and invitations	Logo	Logo	Logo	Logo	Logo	Logo
Listing as sponsor in Annual Meeting eblasts/digital invitations	Logo	Logo	Logo	Logo	Logo	Logo
Event Benefits						
Annual Dinner guest tickets (10 guests per table) Additional tables \$1,./each	25 Tickets 2.5 Tables	20 tickets 2 Tables	10 tickets Full Table	5 tickets 1/2 Table	2 tickets	2 tickets
Meet & Great with Keynote speaker for 1 hour with 30 guests prior to social/dinner (1 available add \$1500 - first come, first serve)	●	●				
Prime table placement of corporate sponsored tables at Annual Dinner	Front Center	Towards Center	Towards Center			
Prominent display of logo on tables as an event sponsor	●	●	●	●	●	●
Firm name, description, and logo listed in Annual Dinner Program & advertisement	Inside Front Cover	Full Page	1/2 Page	1/4 Page	1/4 Page	1/4 Page
Firm logo at bars and tables at Social Hour. Logo on napkins. Signiture Drink. Signage						●
Firm logo or name on the Swag gifts provided to attendees at the event					●	
Firm logo as a sponsor on signage at Annual Dinner Attendee Registration	●	●	●	●	●	●
Logo on signage at the entry/exit with table of Swag/Gifts for the attendees					●	
Exhibitor Table (8'x30") in Social Hour/Reception area	●	●	●	●	●	●
Firm Logo Display: projection screens will display logo image as a sponsor multiple times during program	●	●	●	●	●	●
Special recognition as a sponsor during President's Opening Remarks	Plaque	By Name	By Name	General	General	General
Post-Event Benefits						
List of attendees including Name, Company and Job Title (Name is an opt in field)	●	●				
Priority Speaker at CFA Society Hartford Education Luncheon(s)*	●	●				
Listing as sponsor in Society's post-event Newsletter. social media posts, and one year listing on CFA website with organization/business description.	Logo & Company Description	Logo & Company Description	Logo & Company Description	Logo	Logo	Logo

*Based on request from Sponsor and Sponsor's business alignment with program topic

CFA Charterholder Ceremony

The newest CFA charterholders will be acknowledged and celebrated from 6:30 - 6:45 in the Ballroom.

SPONSORSHIP | Additional Opportunities

Forecast Contest

\$650.

- 2026 Forecast Contest Named after Sponsor
- Ability to choose the 6 contest questions (due by February 1st)
- Logo in Program (digital & printed)
- Presented at the event for in-person
- Only one sponsorship available

New Charterholder Table Sponsor

\$1650.

- Table for New CFA Charterholders attending Forecast Dinner
- Includes 5 tickets for the sponsor's guests and 5 tickets for new CFA charterholders
- Signage on the table
- Includes 1/2 Page advertisement in Program Booklet

Program Advertising

\$140-\$400.

The CFA Society Hartford Forecast Dinner program is a great place to get the word out about your company. With more than 500 printed for attendees and a digital version on website, our program advertisements reach hundreds of leading investment and financial professionals.

- We offer many advertising options to fit every budget and every need. Select from four size options
- Half Page & Full Page Advertisers can add (1) ticket to the Forecast Dinner for an additional \$100.
- Ads are due by January 10th.

Full Color Advertisements

Eighth Page, 1.75" High x 2.5" Wide
\$140.00

Quarter Page, 1.75" High x 5" Wide or 5" x 1.75" Wide
\$165.00

Half Page, 3.25" High x 5" Wide
\$265.00

Full Page, 7-1/2" High x 5" Wide
\$400.00



GOLD SPONSORS

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Voya Investment Management: We help investors push what's possible through differentiated solutions across our fixed income, equity and multi-asset platforms, including private markets and alternatives.

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VOYA INVESTMENT
MANAGEMENT

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Voya Investment Management is the asset management business of Voya Financial overseeing assets for institutions, financial intermediaries and individual investors. Drawing on a 50+ year investing legacy and the expertise of 300+ investment professionals, Voya IM strategies span public and private fixed income, equities, multi-asset solutions and alternatives. We have cultivated an award-winning culture committed to understanding and anticipating clients' needs, producing superior investment performance, and embedding diversity, equity and inclusion in everything we do.

Example of an
Advertisement

REGISTRATION | Forecast Dinner Event

Individual Purchase Options		On or before January 29, 2026	After January 29, 2026
Individual Tickets - Chicken/Filet Dinner	CFA Society Hartford Member	\$99	\$120
	Non-Member	\$165	\$175

Table Sponsorship	On or before January 29, 2026	After January 29, 2026
Full Table (10 tickets) Includes 1/4 Page advertisement in Program Booklet	\$1650.00	\$1750.00
Half Table (5 tickets)	\$800	\$900
New Charterholder Table (5 tickets & 5 sponsored tickets for new charter holders.) Includes 1/2 Page advertisement in Program Booklet	\$1650.00	\$1750.00

Interested in sponsoring a table?

Consider purchasing a table at the upcoming Forecast Dinner to seat your group together.

Each table seats up to 10 people. Purchase a half or full table. Your business name will be included on signage at the table and in the social area. Full table sponsorship includes a 1/4 page advertisement in the Program Booklet.

Contact Rebecca Taylor
administrator@hartfordcfa.org
 or purchase online.

