

PARTNERSHIP OPPORTUNITIES

Become a CFA Society Orlando corporate partner to cultivate deep relationships with key clients, increase visibility, and position your firm as an industry leader.

MAXIMUM EXPOSURE THROUGH MULTIPLE TOUCH POINTS – INCLUDING OUR POPULAR ANNUAL DINNER, FEDERAL RESERVE EVENT, COMMUNITY OUTINGS, AND MORE!

THE BENEFITS:

- Receive unparalleled visibility and engagement opportunities with a niche community of advisors and investment professionals.
- Marketing through CFA Society Orlando, including your logo on our website, emails, and newsletter.
- Drive more traffic to your organization through our robust social media presence. We are the most followed CFA Society in the Southeast on LinkedIn!
- Free tickets to all CFA Society Orlando events you can use for yourself, business partners, or clients.*

**The number of tickets received per event is determined by sponsorship level.*



Members

300+

**Members, 94% with
CFA Designation**



Email Subscribers

2500+

Recipients



Average Age

48

Years Old



Top Positions

- ♦ Portfolio Manager
- ♦ Research Analyst
- ♦ Financial Advisor
- ♦ Consultant
- ♦ Professor

FLAGSHIP & BESPOKE EVENTS

With a partnership, you can get access and marketing at our flagship and bespoke events.

FLAGSHIP

Annual Dinner

- Hosted at premier venues in Orlando: The Alford Inn, Dr. Phillips Center, etc.
- Prior guest speakers include Tom Lee and Liz Ann Sonders
- One of the top financial professional events in Orlando

Breakfast with the Fed

- Hosted at The Citrus Club or Alford Inn
- We bring in research directors from the Federal Reserve Bank of Atlanta, like Dr. David E. Altig



BESPOKE

Wine Blending Workshops, Pickleball, Bowling

- Unique events focused on a niche hobby to reach additional financial professionals
- Often includes a take-home gift, competition, or some additional memento

Fireside Chats

- Highly topical intimate events with a purposefully smaller headcount
- Past speakers include Howard Marks



CFA SOCIETY ORLANDO PARTNERSHIPS

Partnership Level	Diamond Partner \$8,500	Gold Partner \$6,000	Silver Partner \$4,000	Annual Dinner Happy Hour Partner \$5,000
Partnerships Available	1	2	6	1
Event Tickets per Event	4	2	1	N/A
Annual Dinner Tickets	N/A	N/A	6	N/A
Annual Dinner Table(s)	2	1	Option to buy one for \$250*	1
Annual Dinner Recognition	Banner and 2 minutes of brief prepared remarks	Logo and Callout	Logo and Callout	Bar banner, branded bar accessories, and 2 minutes of brief prepared remarks
All Other Events	Banner	Logo	Logo	N/A
Email Marketing	Marketing on our emails to 2500 email subscribers, including semi-annual newsletter content	Marketing on our emails to 2500 email subscribers, including semi-annual newsletter content	Marketing on our emails to 2500 email subscribers, including semi-annual newsletter content	N/A
Social Media Marketing	1 Sponsor Spotlight Post on LinkedIn	1 Sponsor Spotlight Post on LinkedIn	1 Sponsor Spotlight Post on LinkedIn	N/A
Free Job Board Postings	5	3	1	1
Included Private Happy Hour Event Sponsorship	2	1	N/A	N/A

OPPORTUNITIES TO LOCK IN A SET DISCOUNT AND PRICING WITH MULTI-YEAR SPONSORSHIP AGREEMENTS:

- 2-Year Commitment: Receive a 15% discount.
- 3-Year Commitment: Receive a 20% discount.

*Silver Partners have the choice of either 6 free annual dinner tickets or purchasing a table at the annual dinner at a discounted rate of \$250.