



2024 SPONSORSHIP OPPORTUNITIES



**CFA Society
Austin**

OVERVIEW

MISSION

To lead the Austin investment community by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of our members and the community.

WHY CFA SOCIETY AUSTIN?

- Over 700 members
- Fastest growing CFA Society in the US with 8.4% CAGR since 2018
- Largest industry association of investment professionals in Central Texas

MARKETING REACH

CFA Society Austin marketing communications reach far beyond its membership base.

- | | |
|---------------------------|-------|
| • Email distribution list | 3,848 |
| • Facebook followers | 1,056 |
| • Twitter followers | 1,441 |
| • LinkedIn followers | 888 |

WHO IS CFA SOCIETY AUSTIN?

CFA Society Austin is a non-profit, professional organization with over 700 members. It was founded in 1963 to advance investment professionalism by serving the practitioner's need for specialized knowledge, advanced studies, and information on new developments in investments and financial management. Equally important, the organization is a benchmark for ethical conduct in the financial services industry, promoting the highest ethical and professional standards among its members.

MEMBERSHIP



CFA Society Austin benefits from a professionally diverse member constituency.

- Institutional investment managers dedicated to Texas's various institutional asset owners including:
 - Teacher Retirement System of Texas
 - Employees Retirement System of Texas
 - UTIMCO, the second largest university endowment program
 - Texas Treasury Safekeeping Trust Company
 - Texas Permanent School Fund
 - City of Austin Employees Retirement System
- Large asset managers including Dimensional Fund Advisors, PIMCO, and Invesco
- Sophisticated network of private wealth managers catering to Austin's emerging wealth

ANNUAL PROGRAMMING

	DIAMOND	PLATINUM
Available Sponsorships	2	6
Investment	\$8,000	\$6,000
Duration	1-Year (2024)	1-Year (2024)
BENEFITS THROUGHOUT 2024		
CFAA Paid Advertising		
Print	Yes	No
Digital	Yes	No
Email Communication		
Monthly Newsletter	Yes	Yes
Programming	Yes	Yes
Informational Broadcast	Yes	No
Website		
Homepage	Yes	No
Programming Page	Yes	Yes
Annual Dinner Page	Yes	Yes
Admittances to Society Events	2	2
Social Media Post (Twitter/FB/LinkedIn)	Yes 4	Yes 2
Logo Size in Media	Large	Medium
ANNUAL DINNER BENEFITS		
CFAA Speaker Acknowledgement	Yes	Yes
Looped Slide Show	Single	Shared
Event Program	Single	Shared
Signage During Cocktail Hour	Yes	No
Event Email Communication	Yes	Yes
Table 8 Guests	Yes	Yes
Discount for Additional Tables	Yes 50%	No

ANNUAL DINNER

Thursday, February 8, 2024 | AT&T Hotel and Conference Center

	PRESENTING	COCKTAIL	PREMIER
Available Sponsorships	1	3	6
Investment	\$8,000	\$4,000	\$2,500
Duration	Annual Dinner	Annual Dinner	Annual Dinner
BENEFITS PRIOR TO EVENT			
CFAA Paid Advertising			
Print	Yes; Presented by	Yes	No
Digital	Yes; Presented by	No	No
Email Communication			
Event Specific	Yes; Presented by	Yes	Yes
Monthly Newsletter	Yes; Presented by	Yes	Yes
Website			
Homepage	Yes; Presented by	No	No
Annual Dinner Page	Yes; Presented by	Yes	Yes
Social Media Posts (Twitter/FB/LinkedIn)	Yes 2	Yes 1	Yes 1 Shared
Logo Size in Media	Large	Medium	Small
BENEFITS DURING EVENT			
CFAA Speaker Acknowledgement	Yes	Yes	Yes
Looped Slide Show	Single	Single	Shared
Event Program	Inside Front Cover	Inside Back Cover	Shared
Signage During Cocktail Hour	Yes	Yes	Yes
Signage on Cocktail Bar	No	Yes	No
Cocktail Napkins with Logo	No	Yes	No
Table 8 Guests	Yes	Yes	Yes
Discount for Additional Tables	50%	No	No
BENEFITS POST-EVENT			
Summary Email	Yes; Presented by	Yes	Yes
Social Media Posts (Twitter/FB/LinkedIn)	1	1	Shared

TABLES

As in prior years, tables are available for purchase at a rate of \$1,750 for 8 guests with recognition provided in the Event Program and signage on the tabletop.

REMITTANCE

SPONSORSHIP TYPE		
ANNUAL PROGRAMMING		
Diamond Sponsorship	\$8,000	_____ (Initial)
Platinum Sponsorship	\$6,000	_____ (Initial)
ANNUAL DINNER		
Presenting Sponsorship	\$8,000	_____ (Initial)
Cocktail Sponsorship	\$4,000	_____ (Initial)
Premier Sponsorship	\$2,500	_____ (Initial)
Table Purchase	\$1,750	_____ (Initial)

By Initialing here and signing below, we hereby agree to become a CFA Society Austin sponsor at the level and fee as shown. Further, we agree to the terms and conditions outlined.

CFA Society Austin is unable to reserve underwriting opportunities.

Payment must be included to secure and finalize purchase(s). All fees are nonrefundable once paid.

ORGANIZATION AND CONTACT INFORMATION

Organization Name (as you wish it to appear on sponsorship publicity)

Primary Contact Name

Contact Phone Number

Organization Website

Primary Contact Email Address

Mailing Address

Authorized Signature

Date

Please submit executed forms to sponsorship@cfaaustin.org.