



**CFA Society
Detroit**

Sponsorship Opportunities

75+ YEARS OF EXCELLENCE

CFA Society Detroit is the seventh oldest of 160 member societies which constitute the global membership body of CFA Institute.

With a membership of more than 500 investment professionals in the greater Detroit Area, CFA Society Detroit provides constituents with leading-edge educational events, corporate presentations, career development programs, and networking opportunities.



We bring together practitioners and thought leaders to gain and share insights into the latest investment trends to guide professionals working to build an industry in which investors' interests come first, financial markets function at their best, and economies grow. CFA Society Detroit is the local association of investment professionals that sets the standard for professional excellence and credentials.

Our events are designed to deliver relevant, timely, and objective industry knowledge, deepen professional connections, and elevate career goals. We are the champion of ethical behavior in investment markets and a respected source of knowledge in the local financial community.



Our Year-Round Events Include:

- Annual luncheon each November
- New Charterholder award ceremony
- Annual auto show luncheon in January
- Luncheon series events
- Webinars focused on private markets, ESG, and more
- Annual membership meeting
- Golf outings and sporting events
- CFA Institute Research Challenge
- Special programming for women in finance
- Networking events and more!

CONTACT US

To secure any of these opportunities and to gain access to investment professionals attending CFA Society Detroit programming, contact:

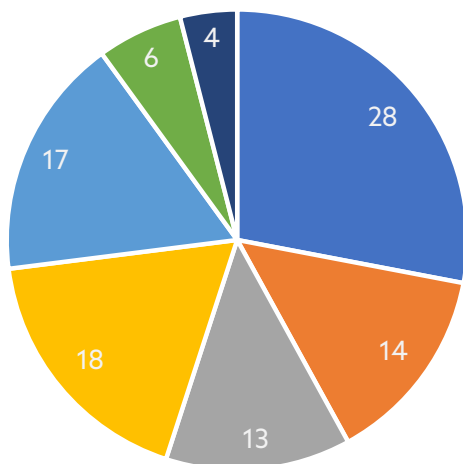
Michelle Doran
Executive Director
(734) 546-2390
info@cfadetroit.org

DEMOGRAPHICS

520+ | Society
Members

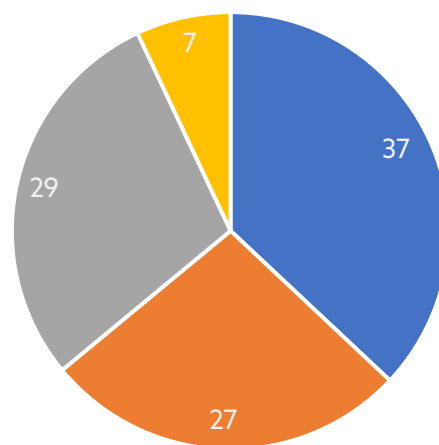
507 | CFA
Charterholders

YEARS WITH THE CHARTER



- 28% Over 20 years
- 14% 16-20 years
- 13% 11-15 years
- 18% 6-10 years
- 17% 2-5 years
- 6% Less than 2 years
- 4% Non-charterholder members

PRIMARY ASSET BASE



- 37% Institutional
- 27% Private
- 29% Both
- 7% n/a

TOP REGIONAL EMPLOYERS

- Bank of America Merrill Lynch
- Blue Chip Partners
- Bricktown Capital
- Clarkston Capital Partners
- Comerica
- Huntington Bancshares
- Lido Advisors
- Loomis, Sayles & Company
- Morgan Stanley
- Peninsula Capital Partners
- Plante Moran Financial Advisors
- PNC Financial
- Schwartz Investment Counsel
- Sigma Investment Counselors
- Stout Risius Ross
- UBS
- Yousif Capital Management

TOP MEMBER OCCUPATIONS

- Accountant/Auditor
- Chief Executive Officer
- Chief Financial Officer
- Compliance Analyst
- Consultant
- Corporate Finance
- Financial Advisor
- Investment Analyst
- Investment Strategist
- Portfolio Manager
- Wealth Manager



**CFA Society
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Annual Luncheon Speakers

Thursday, November 5, 2026 | The Department at Hudson's | Detroit, Michigan

The CFA Society Detroit annual luncheon, held each November, is our signature event with more than 300 attendees. Position your firm as an industry leader and cultivate relationships with key clients while maximizing your exposure in the Detroit financial services industry. Choose a sponsorship package that maximizes your return on investment no matter your budget size.



Nancy R. Lazar is Chief Global Economist at Piper Sandler, she leads the firm's global economics research team and provides institutional investors with forward-looking analysis of the U.S. and global economy. Widely recognized as one of Wall Street's most respected macroeconomic strategists, she is known for her independent thinking, data-driven insights, and ability to identify long-term economic trends before they become consensus views.

Prior to joining Piper Sandler, Nancy co-founded Cornerstone Macro, one of Wall Street's premier independent macroeconomic research firms, which was acquired by Piper Sandler in 2022. Earlier in her career, she co-founded ISI Group, serving as Vice Chairman for more than two decades and helping build one of the industry's most influential independent research organizations. Before launching ISI Group, she was a Senior Vice President at C.J. Lawrence.

Nancy has consistently earned recognition as one of Wall Street's top economists. She has been ranked by Institutional Investor since 2001, repeatedly placing among the top two economists in the industry, including achieving the No. 1 ranking in both 2015 and 2025. She has also been named to Barron's prestigious list of the 100 Most Influential Women in U.S. Finance for five consecutive years (2020-2024), recognizing her impact on financial markets and economic thought leadership.

Nancy is a graduate of Kalamazoo College and remains active in numerous professional organizations, including The Economic Club of New York, the National Association for Business Economics (NABE), New York Forecasters, Money Marketeters, and Women in Finance & Housing.



Andy Buckley The Financial Advisor Who Became a Sitcom Star
After his initial shot at acting didn't pan out, Andy Buckley was 5 years into his career as a Financial Advisor at Merrill Lynch, part of a team managing over \$500 million in personal assets, when he got the luckiest phone call of his life - the offer to appear on the NBC comedy, "The Office." The FA position was the perfect background for his fictional role as David Wallace, CFO of the Dunder Mifflin Paper Company. Buckley stayed at Merrill Lynch for 6 more years, while continuing his role on "The Office," which has led to many other acting opportunities. He presently has regular roles on the HBO comedy "Avenue 5," opposite Hugh Laurie and Josh Gad, as well as the upcoming Netflix action-comedy series, "FUBAR," starring Arnold Schwarzenegger.

In movies, he's gotten to play opposite actors ranging from Will Ferrell, Michael Keaton and Mark Wahlberg ("The Other Guys") to Jeremy Renner ("The House") to Alvin (yes, of "Alvin and the Chipmunks") to Chris Pratt and the T-Rex ("Jurassic World") and Sandra Bullock & Melissa McCarthy ("The Heat"). Other movies he's appeared in include Lady Bird, Bridesmaids, Bombshell and the recent comedy "Most Guys Are Losers," opposite Mira Sorvino.

Born in Boston, Buckley spent time growing up in St. Louis, Chicago, South Florida. He attended Stanford where he played on the golf team his first two years at school. He's married with two sons and resides in Los Angeles.



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Annual Luncheon Sponsorship

PLATINUM SPONSOR

\$10,000 | 1 Available

The Platinum package sponsorship includes:

- Exclusive sponsorship of post-event cocktail reception with logo on signage and napkins
- Opportunity to address the reception audience from the podium
- VIP Meet & Greet and Photo Opportunity with Andy Buckley
- One reserved table (8 seats) with prime placement for employees and guests
- One reserved table (8 seats) for students (*CFAD will provide students*)
- One year listing on CFAD website
- Firm name included in emails and social media feeds promoting event
- Logo featured in event program
- Logo on signage at coat check
- Logo on table sign
- Logo projected on screen during event
- Member pricing for additional attendees
- Sponsor ribbons for your firm's attendees
- Recognition during opening remarks
- Member pricing for all 2027 events
- One foursome in annual golf outing

GOLD SPONSOR

\$7,000 | 4 Available

The Gold package sponsorship includes:

- One reserved table (8 seats) with prime placement for employees and guests
- One reserved table (8 seats) for students (*CFAD will provide students*)
- VIP Meet & Greet and Photo Opportunity with Andy Buckley
- One year listing on CFAD website
- Firm name included in emails and social media feeds promoting event
- Logo featured in event program
- Logo on signage at coat check
- Logo on table sign
- Logo projected on screen during event
- Member pricing for additional attendees
- Sponsor ribbons for your firm's attendees
- Recognition during opening remarks
- Member pricing for all 2027 events
- One foursome in annual golf outing

SILVER SPONSOR

\$5,000 | 8 Available

The Silver package sponsorship includes:

- One reserved table (8 seats) with prime placement
- One year listing on CFAD website
- Logo featured in event program
- Logo on signage at coat check
- Logo on table sign
- Logo projected on screen during event
- Member pricing for additional attendees
- Sponsor ribbons for your firm's attendees
- Member pricing for all 2027 events
- Two players in annual golf outing

BRONZE SPONSOR

\$3,000 | Unlimited

The Bronze package sponsorship includes:

- Four seats at a reserved table
- Firm name featured in event program
- Firm name projected on screen during event
- Member pricing for additional attendees
- Sponsor ribbons for your firm's attendees
- Member pricing for all 2027 events
- One player in annual golf outing



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