

July 1, 2025-June 30, 2026



SPONSORSHIP BROCHURE

Fiscal Year Annual (*July 1, 2025-June 30, 2026*)

Annual Economic Forecast Dinner (*Yearly in January*)

For inquiries, please email admin@cfasouthflorida.org

ABOUT US

MISSION

The CFA Society of South Florida is a member of the CFA Institute Global Network of Societies. Our mission is to lead the investment profession locally by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of our stakeholders, including members, investment professionals, and investors.

VISION

CFA Society South Florida aspires to:

- **Serve local finance professionals** seeking education, knowledge, professional development, connection, or inspiration.
- **Influence the local investment profession** with ethics and excellence of practice.

OBJECTIVES

- Be the leading local association for investment professionals.
- Deliver timely and relevant educational events.
- Develop strategic alliances to strengthen the Society's role as an agent of change in the community.

OUR MEMBERS

550+ Financial professionals

54% Increase in membership over the past decade

44% under the age of **45**

Over **90%** retention rate

Top Member Employers

- **Nextera Energy, Inc**
- **Northern Trust**
- **JP Morgan Chase**
- **Polen Capital Management, Inc**
- **Franklin Templeton Investments**
- **Bank of America/Merrill Lynch**
- **Morgan Stanley Smith Barney**
- **Wells Fargo**

YEAR-ROUND PROGRAMS

Throughout the year, we host events for people to connect, learn, and network with high caliber speakers, financial professionals, investors and business owners from Jupiter to Fort Lauderdale. In addition, our Signature Events are not to be missed!

Events Overview

Private Equity Panel - *September*

Keynote Speaker - *October*

Holiday Party & Charter Awards - *December*

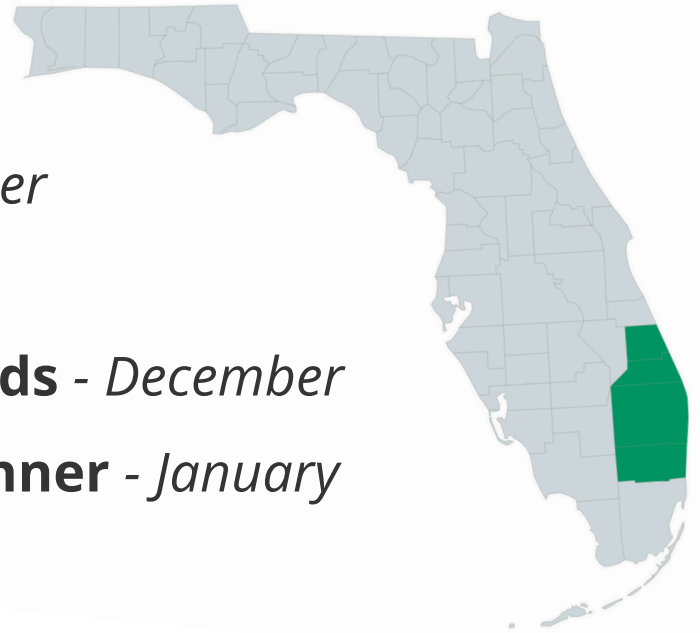
Annual Economic Forecast Dinner - *January*

Research Challenge - *February*

Keynote Speaker - *March*

Regulatory Update - *May*

Annual Member Meeting - *June*



ADDITIONAL RESOURCES

- Regular electronic communications reaching over 1,000 financial professionals.
- Virtual educational resources.
- Networking events and socials throughout the year.

CFA Society South Florida's fiscal year begins in July 1 and ends June 30.

SERVING THE COMMUNITY

The CFA Society of South Florida is a 501(c)(6) tax-exempt educational and service organization for members. We connect individuals.

We offer tax-deductible sponsorship opportunities for those seeking access to noteworthy industry leaders, financial professionals, and CFA charterholders.

If you want to build brand awareness among a prestigious demographic, consider a sponsorship package today!

LAST YEAR'S SPONSORS

2024 - 2025

GOLD



HARDING
LOEVNER

polen
capital

SILVER



PNC PRIVATE BANK

BlackRock®

EVENT SPONSORS

J.P.Morgan
PRIVATE BANK



NORTHERN
TRUST

JENNISON
ASSOCIATES

ANNUAL SPONSORSHIP OPPORTUNITIES

We offer several tiers of sponsorship opportunities to help build brand awareness amongst the preeminent investment professionals in South Florida. Sponsorships are offered on a first-come, first-serve basis.

Annual sponsor from July 1, 2024 - June 30, 2025

	Gold Annual Sponsor	Silver Annual Sponsor	Friend of the Society
Description	Fosters an on-going partnership with the CFA Society of South Florida, allowing for multiple engagement opportunities throughout the year		
Commitment	\$6,000	\$3,000	\$750
Sponsorships Available per Season	3	5	10
Featured Sponsor Signature Event	Yes	NA	NA
Featured Sponsor Recognition at Events	Yes	Yes	NA
Ability to Provide an Event Speaker/Panelist	Yes	Yes	NA
Named Sponsor at Networking Event or Webinar	Yes	Yes	NA
Tables Included (Annually)	2	1	NA
Table Placement	Near Head Table	Near Front	NA
Recognition in Marketing / Email Material	Firm Logo & Website Link	Firm Logo & Website Link	Firm Logo & Website Link
Recognition at Sponsored Events	Talk Time, Banner or Slide Show	Banner or Slide Show	NA
Spotlight on Job Listing On Website	Yes	Yes	Yes
CFA Society of South Florida Membership (quantity)	2	1	NA

EVENT SPONSORSHIP OPPORTUNITIES

Sponsorship for our Signature Events (Not Including Annual Forecast Dinner)

	Exclusive Sponsor	Cocktail Sponsor	Dessert Sponsor	Table Sponsor
	For sponsors desiring exposure to attendees of our signature events			
Description				
Commitment	\$6,000	\$3,000	\$1,500	\$1,000
Ability to Provide a Speaker / Panelist	Yes	NA	NA	NA
Tickets Included For the Event	To Fill 2 Tables	4	2	To Fill Table
Tables Included For the Event	2	0	0	1
Table Placement	Near Head Table	NA	NA	Near Front
Recognition in Marketing Material	Firm Name/Logo for Event	Firm Name/Logo for Event	Firm Name/Logo for Event	NA
Recognition at Sponsored Event	Talk Time, Slide Show or Banner, Table w/ Materials	Mention, Slide Show or Banner Table w/ Materials	Mention, Slide Show or Banner, Table w/ Materials	Mention, Slide Show or Banner
Website Recognition	On Event Page	On Event Page	On Event Page	NA

EVENT SPONSORSHIP OPPORTUNITIES:

ANNUAL ECONOMIC FORECAST DINNER

Our Annual Forecast Dinner is our largest and most anticipated event of the year, occuring every January at Quail Ridge Country Club in Boynton Beach.

Sponsorship Type	Feature Event Sponsor	Cocktail Hour Sponsor	Dessert Sponsor	Table Sponsor
Commitment	\$7,000	\$4,000	\$2,000	\$1,200
Sponsorships Available for the Event	1	1	1	6
Tables Included For Event	1	NA	NA	1
Tickets Included for Event	8 (one for each seat at the included table)	4	2	8 (one for each seat at the included table)
Table Placement	Front of Venue	NA	NA	Front of Venue
Recognition in Marketing Material	Firm Logo with Website Link	Firm Logo with Website Link	Firm Logo with Website Link	Firm Name/Logo for Event
Recognition at Forecast Dinner	Talk Time, Head Logo on Posters & Slide Show, recognized at the start of the program	Logo on Posters and Slideshow, recognized during cocktail hour	Logo on Posters and Slideshow, recognized durring dessert	Logo at Table & on slideshow

[LinkedIn](#)

[Twitter](#)

[Instagram](#)

[Facebook](#)

www.cfasociety.org/southflorida