



CFA Society South Florida

July 1, 2026-June 30, 2027



SPONSORSHIP BROCHURE

Fiscal Year Annual (July 1, 2026-June 30, 2027)

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

575+ Financial professionals

60% 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**

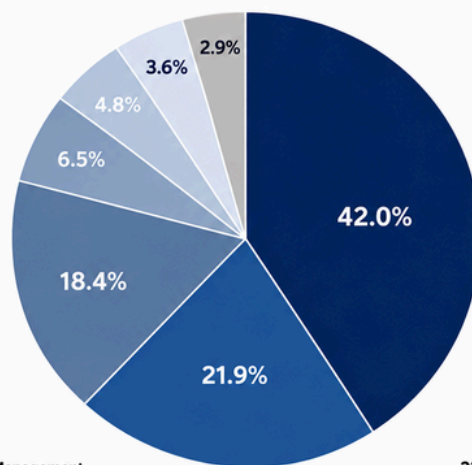


**CFA Society
South Florida**

Active Society Members by Employer Type

Based on members who reported an employer type.

Categories representing less than 2% of respondents are grouped into Other.



Asset Management	221	42.0%
Private Wealth	115	21.9%
Other	97	18.4%
Utilities (e.g., Oil & Gas, Energy)	34	6.5%
Consulting	25	4.8%
Brokerage	19	3.6%
Commercial Bank	15	2.9%

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

Signature Events:

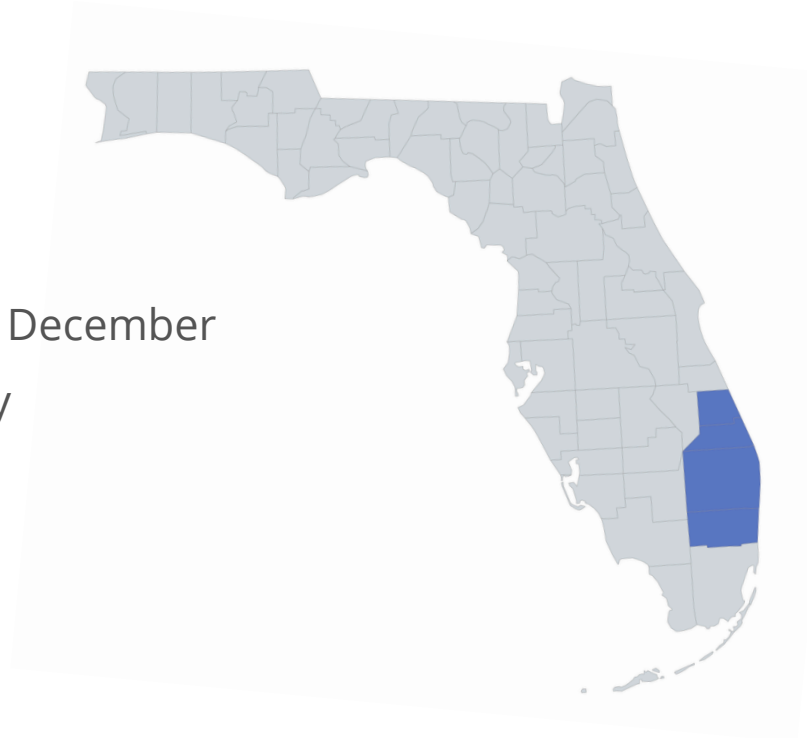
- Holiday Party / Charter Awards - December
- Annual Forecast Dinner - January
- Annual Member Meeting - June

Keynote Speaker Events

- 3+ per year
- Held in Fall, Winter, and Spring
- Regulatory Update (Panel) - May

Social / Networking Events

- One per quarter, taking place in a different area of our region from Jupiter to Ft. Lauderdale



ADDITIONAL RESOURCES

- Regular electronic communications reaching over 1,000 financial professionals.
- Virtual educational resources.

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

2025 - 2026

GOLD

polen
capital

SILVER



PNC PRIVATE BANK

BlackRock[®]

 First Trust

 **DWS**

SS&C

ALPS ADVISORS

EVENT SPONSORS



WISDOMTREE[®]

Vanguard[®]



ARTISAN PARTNERS

ANNUAL SPONSORSHIP OPPORTUNITIES

Benefits	Gold Annual Sponsorship \$6,000	Silver Annual Sponsorship \$3,000	Bronze Annual Sponsorship \$1,500
Event Access / Recognition			
Named Sponsor Recognition at events	✓	✓	✓
Event Tables included Annually	2	1	
Complimentary Tickets to Networking Events	2	1	
Ability to Provide a Panelist / Speaker	✓	✓	
CFA Society of South Florida individual Memberships	2	1	1
Branding / Visibility			
Recognition (logo / link) on CFASFL Website	✓	✓	✓
Recognition on Email Communications	✓	✓	✓
Logo on pre/post event slides (or banner / pasteboard) at Signature Events	✓	✓	✓
Newsletter Recognition	✓	✓	✓
Ability to provide content in Newsletter	✓		
Yearly LinkedIn Sponsor Recognition Post	✓	✓	
Spotlight on Job Postings on Website	✓	✓	

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.

EVENT SPONSORSHIP OPPORTUNITY:

ANNUAL ECONOMIC FORECAST DINNER

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

Feature Sponsor \$6,000

- Company name and logo featured at the beginning of the slide show, footer of each slide, and sponsor poster board.
- Recognition during welcoming speech by CFA South Florida president, and the opportunity for talk time from a representative.
- Two complimentary tables (16 guests total) located at the front of the venue.
- Social Media spotlight two weeks prior to the dinner.
- Half page slot in dinner program booklet.
- Website recognition on main society sponsorship page AND event registration website.
- Ability to provide content in January Newsletter.

- Company name and logo featured at the beginning of the slide show and general sponsor poster board.
- Cocktail Napkins with printed logo used at cocktail hour.
- One complimentary table (8 guests) located near the front of the venue.
- Recognition during welcoming speech by CFA South Florida president.
- Company name/logo recognized in the program booklet.
- Website recognition on event registration website.
- Recognition in January Newsletter.

Cocktail Hour Sponsor \$3,500

Dessert Sponsor \$2,500

- Company name and logo featured at the beginning of the slide show and general sponsor poster board.
- Stir sticks with company logo passed out with dessert tea/coffee.
- 4 complimentary tickets to attend the event.
- Recognition during welcoming speech by CFA South Florida president.
- Company name/logo recognized in the program booklet.
- Website recognition on event registration website.
- Recognition in January Newsletter.

- Company name and logo featured at designated table.
- One table (8 guests) located near the front of the venue.
- Recognition during welcoming speech by CFA South Florida president.
- Company name/logo recognized in the program booklet.

Table Sponsor \$1,200

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www.cfasociety.org/southflorida