



SPONSORSHIP BROCHURE

Fiscal Year Annual (*July 1, 2024-June 30, 2025*)

Economic Outlook 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

500+ Financial professionals

Average age of **49.5**

32% under the age of **40**

Over **92%** retention rate

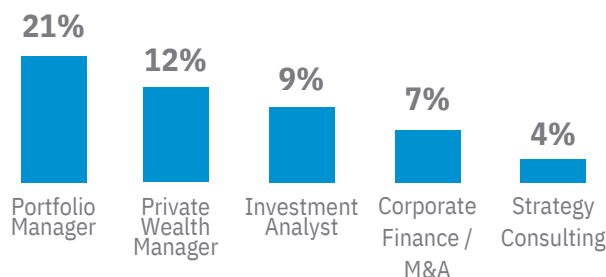


**CFA Society
South Florida**

Top Member Employers

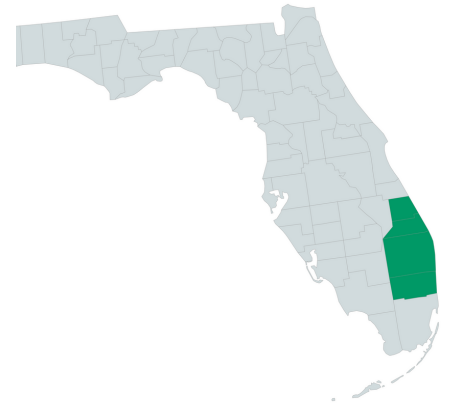
- **Nextera Energy, Inc**
- **Franklin Templeton Investments**
- **Northern Trust**
- **Wells Fargo**
- **JP Morgan Chase**
- **Polen Capital Management, Inc**
- **Morgan Stanley Smith Barney**
- **Bank of America/Merrill Lynch**

Top 5 occupations



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!



SIGNATURE EVENTS

Alternative Investments October

Charter Awards November

Holiday Party December

Economic Outlook Dinner January

Research Challenge February

Career Development March

Equity Investments June

ADDITIONAL RESOURCES

- Quarterly newsletter 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!

[LinkedIn](#)

[Twitter](#)

[Instagram](#)

www.cfasociety.org/southflorida

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.

Description	Annual sponsor from July 1, 2024 - June 30, 2025			Event Sponsor		
	Gold Annual Sponsor	Silver Annual Sponsor	Friend of the Society	Exclusive Sponsor	Cocktail Sponsor	Dessert Sponsor
	Fosters an on-going partnership with the CFA Society of South Florida, allowing for multiple engagement opportunities throughout the year			For sponsors desiring exposure to attendees of our signature events		
Commitment	\$6,000	\$3,000	\$750	\$6,000	\$3,000	\$1,500
Sponsorships Available per Season	3	5	10	1	1	1
Featured Sponsor Signature Event	Yes	NA	NA	Yes	Yes	Yes
Featured Sponsor Premier Event	*May select a Premier Event in lieu of a Signature event	Yes	NA	NA	NA	NA
Ability to Provide an Event Speaker/Panelist	Yes	Yes	NA	NA	NA	NA
Named Sponsor at Networking Event or Webinar	Yes	Yes	NA	NA	NA	NA
Tables Included (Annually)	2	1	NA	2	1	NA
Table Placement	Near Head Table	Near Front		Near Head Table	Near Front	NA
Recognition in Marketing Material	Firm Logo with Website Link	Firm Logo with Website Link	Firm Logo with Website Link	Firm Name/Logo for Event	Firm Name/Logo for Event	Firm Name/Logo for Event
Recognition at Sponsored Events	Talk Time, Banner or Slide Show	Talk Time	NA	Talk Time, Slide Show, Table w/ Materials	Mention, Table w/ Materials	Mention
Newsletter Recognition	Firm Logo with Website Link	Firm Logo with Website Link	Firm Logo with Website Link	On Event Page	On Event Page	On Event Page
Spotlight on Job Listing Newsletter	Yes	Yes	Yes	NA	NA	NA
CFA Society of South Florida Membership (quantity)	2	1	NA	NA	NA	NA