CFA Society San Diego

20th Annual Forecast Dinner

3 FEBRUARY 2027 | The Prado @ Balboa Park



PROGRAM AGENDA

3^{30} · 5^{30} Registration and Cocktails

5^{30} · 6^{30} CFA Society San Diego Opening Remarks & Dinner

6^{30} · 7^{00} Forecast Contest & Presentation

7^{00} · 7^{45} Q&A | Conclusion of the 2027 Forecast Dinner

About the CFA Society San Diego

OUR MISSION

The mission of the CFA Society San Diego is to serve the needs of professionals in the investment decision making process by providing a forum for the exchange of information and ideas among its members, by enhancing members' investment knowledge, and by encouraging high ethical standards and professional conduct among all participants in the investment industry.

WHO WE ARE

The CFA Society San Diego was founded in 1962 as the Financial Analysts Society of San Diego, Inc. to promote a high standard of ethics and sound professional standards of investment management and research, and to enhance professional knowledge and skills. The Society was admitted to the Association for Investment Management and Research (AIMR) on November 4, 1963. In May 2004, AIMR became CFA Institute and in May 2005, the Society changed its name to CFA Society San Diego, in order to more closely align with the CFA Institute and the Chartered Financial Analyst (CFA®) designation.

There are over 625 members of the CFA Society San Diego, including security analysts, portfolio managers, bankers, and other investment professionals. Approximately 580 CFA Society San Diego members hold the Chartered Financial Analyst designation. In addition, approximately 300 are currently candidates for this prestigious professional designation.

ABOUT THE SAN DIEGO FORECAST DINNER

This year marks our 20th annual Forecast Dinner, and we anticipate the event will draw over 290 attendees and guests. Most of the attendees will include professional money managers, investment consultants, plan sponsors, financial planners and financial advisors from San Diego and Southern California.

The 2027 Forecasting Dinner will consist of a cocktail hour, dinner, presentation, and the Forecast Contest . Each attendee will enjoy a cocktail reception and an exceptional three-course meal accompanied by wine.

CFA Society San Diego Fact Sheet

ABOUT CFA SOCIETY SAN DIEGO

CFA Society San Diego promotes the highest ethical standards and professional excellence within the local investment community. CFA Society San Diego is an association of local investment professionals, consisting of portfolio managers, security analysts, investment advisors and other financial practitioners, that has served CFA charterholders and CFA Program candidates locally since 1962.

CFA Society San Diego is a member society of CFA Institute. There are 160 CFA societies around the world that support the mission of CFA Institute at a local level and provide members with career growth, information exchange, and professional networking opportunities.

ABOUT CFA INSTITUTE

CFA Institute is a global community of more than 200,000 investment professionals working to build an investment industry where investors' interests come first, markets function at their best, and economies grow. We develop and promote professional and ethical standards and administer the Chartered Financial Analyst credential, and the CFA Institute Investment Foundations® program. For more information, visit www.cfainstitute.org.

SPONSORSHIP

CFA Society San Diego is a vital part of the San Diego investment community with over 600 members spanning the breadth of our industry. Partnering with CFA Society San Diego, either as a sponsor or an underwriter, positions your company in front of our constituents, providing exposure to and interaction with this targeted group of high-profile individuals over half of which transact on the buy side of our industry. Our events, which are directly marketed to more than 1,000 finance industry professionals from around the region, have a proven track record of providing great insight and generating interesting conversations, sure to entertain your clients and colleagues, and provide invaluable networking opportunities with the region's most talented investment professionals. To discuss sponsorship/underwriting opportunities, please contact sponsorship@sandiego.cfasociety.org.

CONTACT CFA SOCIETY SAN DIEGO

To find out more please visit: http://www.cfasociety.org/sandiego
Tel: 619.684.6228
E-mail: sponsorship@sandiego.cfasociety.org

MEMBER DEMOGRAPHICS
as of June 2026

AVERAGE AGE
45

GENDER
84% Male / 16% Female

MEMBERSHIP TYPES
- 580 Charterholders
- 5 Affiliate Members

TOP CHARTERHOLDER ROLES
- Portfolio Manager
- Equity Analyst
- Investment Analyst
- Private Wealth Manager
- Chief-Level Executive

TOP SAN DIEGO EMPLOYERS
1. Brandes Investment Partners
2. LPL Financial Holdings, Inc
3. StepStone Group LLC
4. Meketa Investment Group
5. Raymond James
6. Chandler Asset Management, Inc
7. CI Financial
8. Allianz SE
9. JP Morgan Chase
10. Voya Investment Management

20th Annual Forecast Dinner

Sponsorship Opportunities

The Forecast Dinner is a unique opportunity for San Diego investment professionals to gather and discuss their thoughts for the economy and financial markets. We hope your firm will join us for this special occasion and support us at a level commensurate with your vision for our organization. Your pledge of support will assist the CFA Society San Diego in its ongoing effort to provide high quality programming to its members. It will also identify your firm as one that understands the need to support the highest standards in the financial services industry by endorsing a professional investment organization such as the CFA Society San Diego.

UNDERWRITING OPPORTUNITIES

NETWORKING RECEPTION - $3,000 each | 1 available
Firm logo on signage at cocktail reception tables
1 individual ticket to dinner

BRANDED GIFT - $2,500 each | 1 available
Branded gift provided by sponsor placed on guest seats (pre-approved by CFASSD)
Firm logo in the event program
Firm logo in the welcome screen slide show
2 individual tickets to dinner

STUDENT SCHOLARSHIP - $1,200 each
Provides admission for 3 university students to the dinner
Firm name listed in event program
Firm logo in the welcome screen slide show
1 individual ticket to dinner

CORPORATE TABLES

GOLD TABLE SPONSOR - $5,000 each | 5 available
Premium seating for 10
Premium logo positioning in the event program
Premium logo positioning in the welcome screen slide show
Firm logo on the table sign
Firm name mentioned during opening remarks
Firm tagged in social media posts
Option to handout literature at registration table
Company logo included on step and repeat banner

SILVER TABLE SPONSOR - $3,000 each
Preferred seating for 10
Preferred logo positioning in the event program
Preferred logo positioning in the welcome screen slide show
Firm logo on the table sign

BRONZE TABLE SPONSOR - $2,500 each
Seating for 10
Firm name on the table sign

INDIVIDUAL REGISTRATION

SOCIETY MEMBERS - $175 each

NON-MEMBERS - $250 each

20th Annual Forecast Dinner

Registration Form

UNDERWRITING OPPORTUNITIES

- ❑ $2,500 Branded Gift
- ❑ $1,200 Student Scholarship
- ❑ $3,000 Networking Reception

ATTENDEE RESERVATIONS

	# Requested		Total $ Amount
❑ Gold Corporate Table (for 10)	_____	at $5,000 for	_____
❑ Silver Corporate Table (for 10)	_____	at $3,000 for	_____
❑ Bronze Corporate Table (for 10)	_____	at $2,500 for	_____
❑ Individual (Member)	_____	at $175 for	_____
❑ Individual (Non-Member)	_____	at $250 for	_____
		Total	_____

PAYMENT OPTIONS

❑ Check (Payable to CFA Society San Diego)

❑ Invoice Requested (Payment via check is greatly appreciated and the preferred method of payment.)

Total Amount: $ _____

Organization Name (As you wish it to appear on the sponsorship publicity):

_____

Mailing Address: _____

Primary Contact Name: _____

Primary Contact E-mail: _____

Authorized Signature: _____ Date: _____

If you have additional questions regarding sponsor opportunities please email to: sponsorship@sandiego.cfasociety.org or mail to: CFA Society San Diego, P.O. Box 928456, San Diego, CA 92192-8456

Cancelation Policy: All ticket and table reservations are nonrefundable beginning January 8, 2027. Underwriting opportunities are nonrefundable from date of purchase.

CFA Society San Diego will be taking photos and/or video at this event. By participating, you are giving us your permission to be in the photos and/or video. Photos and/or video may appear online and in social media.