

Take advantage of these sponsorship opportunities

CFA Society Minnesota

2026 Annual Golf Tournament

September 28, 2026

NEW LOCATION
Town & Country Club

18 Hole Regulation Course (playing 18)

LAST YEAR'S ATTENDANCE – 100+

CFAMN has over 1,400 members across Minnesota, North Dakota & South Dakota.

Over 6,000 individuals receive the society's electronic communications. New this year, we'll be playing at the private course, Town & Country Club in St Paul, MN.

SPONSORSHIP LEVELS

Reception Sponsor	$2,000
Hole Sponsor	$1,500

One foursome ($800 value) is included with each of these options.

Ensure your firm is represented at this exclusive event. Send an email to **sponsorship@cfamn.org** or call us at **(612) 317-2888** today!

Do you have a sponsorship idea that isn't listed? Let us know how you'd like to be involved.





Photos by Sue Navarro

Location: Town & Country Club, St Paul

Tournament agenda:

10:30 am - Registration (box lunches provided)
11:30 am - Shotgun start
4-5 pm - Golfing concludes
5-7 pm - Reception

PAST GOLF TOURNAMENT SPONSORS

We appreciate your generous support!

21st Century Bank
Addepar
Adeptyx
Alloy Brewing Company
Ameriprise
Aristotle
CFAMN Board of Directors
Charles Schwab & Co
Compass Capital Management
Cornerstone Capital Management
DGI
EisnerAmper
FactSet
Federated Hermes
Franklin Templeton
Frost Investment Advisors
IPG
John Hancock Investments
LoCorr Funds
Natixis
NIRI Twin Cities
Northland Securities
Peakhaven
Punch & Associates
RiverSource Investments
SS&C ALPS Advisors
S&P Global
Schwab Institutional
Securian
Slocum
Stalla
Stone Murphy
Stonebrigde Capital
The Leuthold Group
T. Rowe. Price
Wells Fargo

PAST ATTENDING FIRMS

Past 3 years

21st Century Bank
Abbott Northwestern Hospital
Accru Wealth
Adeptyx
Affiance Financial
Alerus
Allianz
Allina Health System
Allspring Global Investments, LLC
Ameriprise Financial, Inc
Bearing Point Capital
Bell Bank
Bell Institutional Investment Management
Berger Financial Group
Bernicke Wealth Management
BMO
BMO Wealth Management
Boulay Financial Advisors, LLC
BPS Capital Management
Bremer Bank
Capital Group
Cargill
CB Richard Ellis
Center Street Lending
Childrens Hospital
City National Bank, an RBC Company
Columbia Threadneedle Advisers, LLC
Common Cents Collective
Compass Capital Management, Inc
Crane Capital Management
Diamond Hill Capital Management, Inc
Disciplined Growth Investors
Doran Companies
Edward Jones
Eide Bailly
EMC Group, Inc
EnBoon
Envoi, LLC
Essentia Health
Excelsior Energy Capital
Exeter Wealth Management
Fairview Health Services
Federated Hermes
Fiduciary Counselling, Inc.
Fiera Capital
Flame Point Games
Galliard Capital Management Inc
Gen Financial
Halo Investing
Heintz & Clark Ltd.
Innovative Planning Group
Jak CPA
JNBA
John Hancock
JP Morgan Private Bank
Kovitz
Legacy Financial Advisors
Legg Mason Private Portfolio Group, LLC
LGM Wealth Management
Lockton companies
LoCorr Funds
MacArthur Co.
Mairs and Power, Inc.
Mariner Wealth Advisors
Marks Group Wealth Management
Mercer
Merchants Bank
Merrill Lynch
Merrill Private Wealth Management
Minneapolis Portfolio Management Group, LLC
MTS
Natixis Investment Managers
NEPC
Northern Pacific Group
Northern Trust
NorthRock Partners
Olympus Ventures
Orgel Wealth
Parable Wealth Partners
Parameters
Parametric Portfolio Associates LLC
PNC Private Bank
Portico Benefit Services
Precision Dent Removal
Presbyterian Homes
PrideCo Capital Management
Punch & Associates, Inc.
Pzena Investment Management
Raymond James
RBC Global Asset Management (U.S.) Inc.
RBC Wealth Management
Realty One
RowCal Realty
S&P Global
Securian
Social Security Administration
ST Capital
Standard Valuations, Inc.
State Street Investment Management
State Street SPDR ETFs
Stone Financial Group
Stonebridge Capital Advisors, LLC
T. Rowe Price
Target Corp
Thrivent
Trademark Financial Management, LLC
U.S. Bank
Ulland Investment Advisors, LLC
UnitedHealth Group
University of Minnesota
University of St. Thomas
Voya Investment Management
Vuealta
Webb Financial Group
Wells Fargo
Western National Mutual Insurance
Wilson Mcshane
WPT
Xcel Energy

TERMS & CONDITIONS

This event, hosted by the CFA Society of Minnesota (the Society), is generously supported by a variety of organizations — especially sponsors like you. We rely on and value your contributions. As a non-profit association, we work hard to provide our members the most comprehensive package of services and experiences possible within the constraints of our limited resources. In other words, we strive to make every dollar stretch, and we thank you for helping us do so.

Please read the following information thoroughly, as it pertains directly to your relationship with us and defines our Event Sponsor Agreement.

Availability — Participation is at the discretion of the CFA Society of Minnesota. Sponsor opportunities are based on availability and cannot be processed without a signed agreement and payment, which must be received by July 31, 2026 in order to guarantee applicable benefits. Forms received after July 31, 2026 will be reviewed to find the best way to capitalize on remaining promotional and benefits opportunities. Many options exist to help you tailor your selected package — we're willing to be creative to bring you the benefits you desire.

Term — The term of this agreement is for activities before, during and after the event listed on p. 1 of this agreement.

Signage/Display — All recognition is the sole responsibility of the Society. No additional signage or display (physical or digital) by sponsors is permitted unless approved in advance or explicitly detailed in an approved sponsor or agreement.

Endorsement/Use — Society recognition of sponsor in no way constitutes endorsement of the firm's products, services or facilities. Any data obtained through sponsor packages is reference material only and not for ongoing use or distribution.

Transfer — A sponsor agreement is assigned to one organization and may not be perceived inherent, or transferred to any subsidiary or sponsor organization.

Termination — The Society shall have the right to terminate its obligations under this Agreement, upon notice to the sponsor in the event the sponsor is, or any of its officers or directors are, the subject of, or involved in, bankruptcy, court action or some other type of scandal, event or occurrence which results in adverse publicity within the industry or general public which, in the reasonable and good-faith opinion of the Society, could disparage or impair the reputation and/or integrity of the CFA Society of Minnesota, the CFA designation, or our membership. Further, the Society shall have the right to terminate its obligations under this Agreement if sponsor obligations are not met, or are not met in a timely matter.

Refund — If the Society terminates its obligations under this agreement pursuant to the preceding paragraph, the sponsor remains obligated to make payments in full to the Society as agreed. Under no circumstance is the Society obligated to return any payment(s) already made by sponsor. Full payment is due, and no refunds will be issued after receipt of signed contract.

Responsibilities — The CFA Society of Minnesota agrees to: (a) fulfill benefits as described; (b) request materials and information in a timely manner; (c) communicate with the sponsor in a timely manner; and (d) answer questions and address any concerns.

The sponsor agrees to: (a) provide prompt payment; (b) present all required information in a timely manner; (c) communicate with the Society in a timely manner; and (d) promptly report any concerns to the Society.

Payment Information

Prior to the start of any sponsor benefits, payment must be collected in full, or arrangements made for payments, by the date shown on your invoice. Payment may be made by check payable to CFA Society of Minnesota or by credit card, following the instructions on your invoice.

After receipt of signed agreement, sponsor is responsible for full payment, and no refunds will be issued.

CFA Society of Minnesota
121 South Eighth Street, Suite 825
Minneapolis, MN 55402

Shannon Schaaf, MBA
Executive Director
shannons@cfamn.org
612-317-2888 phone
612-317-2888 fax