

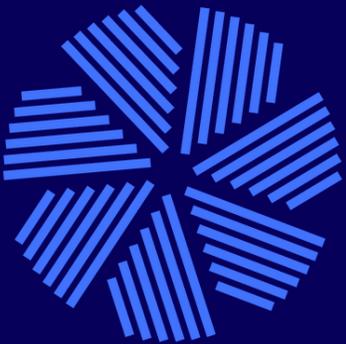


CFA Society
Orange County

Sponsorship Opportunities

Annual Holiday and New
Charterholder Dinner

Wednesday, December 3
Balboa Bay Club



Visit
cfasociety.org/orangecounty/home

A letter from our event Co-Chairs



Mary Sigler, CFA



Chris Edgar, CFA

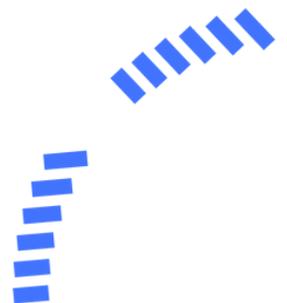
On behalf of our investment community in Orange County, we are excited to extend an invitation for you to sponsor our upcoming Annual Charterholder Dinner. This cherished event is a wonderful opportunity for us to unite, celebrate our newest charterholders, and reflect on the successes we've achieved as a community during this festive holiday season.

We are thrilled to have Bruce Emken return by popular demand with his delightful "12 Days of Christmas" presentation, which will add a unique touch of joy to our gathering. Additionally, we are honored to announce that Stephanie Aliaga from J.P. Morgan Asset Management will serve as our keynote speaker for the evening, further enhancing the significance of this event.

Your support would not only highlight your commitment to the investment community in Orange County but also provide an excellent platform for visibility and networking opportunities with fellow industry professionals. We would greatly appreciate your consideration in sponsoring this memorable occasion.

Thank you for considering this opportunity to participate in a celebration that honors our achievements and cultivates connections within our vibrant community. We look forward to the possibility of partnering with you for this special event.

Mary Sigler, CFA & Chris Edgar, CFA



Sponsorship Packages Offered



01

Title Sponsor (Exclusive)

Investment: \$10,000

- Premier logo placement on all event materials, website, and signage
- “Presented by [Sponsor Name]” on all event promotions
- Opportunity to provide welcome remarks (2-3 minutes)
- Two reserved VIP tables (16 seats total)
- Full-page ad in event program
- Sponsor feature in CFAOC newsletter and social media
- Opportunity to provide branded items to attendees
- 6 month recognition as CFAOC Annual Sponsor on website

02

Speaker Sponsor (Exclusive)

Investment: \$7,500

- Recognition as “Speaker Sponsor” in all marketing and during speaker introduction
- Opportunity to introduce the keynote speaker (1-2 minutes)
- 1 reserved VIP table (8 seats)
- Half-page ad in event program
- Logo placement near stage and in speaker session area
- Social media and newsletter mention

03

Wine Sponsor (Exclusive)

Investment: \$3,500

- Logo displayed on wine service stations and each wine bottle served
- Recognition during dinner announcements
- 4 event tickets
- Quarter-page ad in event program
- Logo on event website and marketing emails

04

Dessert Sponsor (Exclusive)

Investment: \$3,000

- Logo on menus and table signs
- Verbal recognition during dessert service
- 4 event tickets
- Logo in event program and digital promotions

Sponsorship Packages Offered



05

Parking Sponsor (Exclusive)

Investment: \$2,500

- Logo on all parking signage and parking validation tickets
- Recognition at registration and in program
- 2 event tickets
- Social media shoutout

06

Wi-Fi Sponsor (Exclusive)

Investment: \$2,500

- Custom WiFi network name and/or password featuring sponsor name
- Signage with sponsor logo and WiFi details at registration and throughout venue
- 2 event tickets
- Logo in program and on website

07

Table Sponsor (Limited Available)

Investment: \$2,000

- Reserved table for 8 guests
- Table signage with sponsor logo
- Name/logo listed in event program
- Recognition on CFAOC event page

Add-On Opportunities (Optional)

- **Branded giveaway items** in gift bags (provided by sponsor)
- **Raffle prize donor** (verbal recognition during raffle, logo in program)