



# CFA Society Orange County

## 2023/2024 Sponsorship Opportunities



4533 MacArthur Boulevard, #182  
Newport Beach, CA 92660

**SPONSORSHIP OPPORTUNITIES**  
**Network, Connect, and Inspire!**

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# CFA Society Orange County

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## **The mission of CFA Society Orange County (CFAOC) is to:**

1. Foster a supportive community for both current and next-generation investment professionals in which to build valuable networks, expand industry knowledge, and gain financial education, and;
2. Promote the highest standard of ethical and professional conduct within the Orange County investment community.

## **Why Sponsor with CFAOC**

CFAOC is the premier association for financial analysts and investment professionals in Orange County. With over 700 members, most of whom hold the Chartered Financial Analyst (CFA) designation, CFAOC plays a vital role in advocating continuing education and ethical practices for professional excellence in the growing Orange County investment community.

CFAOC is one of 150+ connected local societies across the world that are affiliated with CFA Institute, the global not-for-profit organization of more than 150,000 investment professionals that awards the CFA and CIPM designations. Society membership creates a valuable link between CFA charterholders and investment professionals in over 165+ countries and regions.

## **Key Benefits:**

- Receive a list of consenting attendees
- Generate new leads and prospects
- Target your primary event audience
- Gain market and brand awareness
- Multiple registration tickets for events



## **Our Members and Event Attendees:**

RIAs, Financial Planners, Investment Strategists, Portfolio Managers, Research Analysts, and Other Financial Professionals.



# Annual Event Sponsorships

## EDUCATIONAL PROGRAMS SPONSOR

**\$1,100 - \$3,500 (6 AVAILABLE)**

Host an in person or virtual educational event leveraging the thought leadership of your firm's best subject matter experts. Timely and relevant topics include Macroeconomics (inflation, rising rates, geopolitics), Practice Management (building diverse teams, leveraging technology, expanding services), Investment Management (alternatives, digital assets, portfolio management)

- Receive brand recognition on all program event email communications, in our monthly newsletter, and on our website (including logo visibility and link to website)
- Receive permissioned attendee list post event
- Stay in the loop by getting added to the CFAOC monthly newsletter that highlights upcoming educational and social programs, important member information, and more
- Complimentary attendance at future social events (happy hours, sporting events, etc.)

## SOCIAL SPONSOR

**\$1,200 (6 AVAILABLE)**

Host one of our monthly "Invest in Yourself Networking Series" happy hour events or run a fun and exciting event of your choice (pickleball, lawn bowling, or anything else creative you can think of!)

- One-minute elevator pitch at the start of the event
- Logo on all program event email communications, in our monthly newsletter and on our website.
- Inclusion on our email distribution list
- Invitation to attend social events (happy hours, sporting events, etc.)

## WOMEN IN FINANCE SPONSOR

**\$750 - \$1,200**

- Quarterly networking events - \$750 each
  - Logo on all program event email communications, in our monthly newsletter and on our website.
  - Inclusion on our email distribution list
  - Invitation to attend social events (happy hours, sporting events, etc.)
- Sponsored speaker events - \$1,200 each
  - Logo on all program event email communications, in our monthly newsletter and on our website.
  - Inclusion on our email distribution list
  - Invitation to attend social events (happy hours, sporting events, etc.)



# Signature Events Sponsorships

## CHARTERHOLDER RECOGNITION & HOLIDAY DINNER DECEMBER 12, 2023 - Balboa Bay Club

Join over 100 CFA Charterholders, family, and friends to celebrate new CFA Charter recipients. The event included 90 minutes of networking, a keynote address from CFAOC leadership including sponsor recognition, and a premium dining experience.

- Logo on all program event email communications, in our monthly newsletter and on our website.
- Inclusion on our email distribution list
- Invitation to attend social events (happy hours, sporting events, etc.)
  - Headline Sponsor: \$3,500
  - Uber Sponsor: \$1,200 x5
  - Signature Cocktail Sponsor: \$2,200 x2

REACH - 700+ Members



## WEALTH MANAGEMENT SYMPOSIUM April 25, 2024

Hosted at the Costa Mesa Hilton. This half-day event includes keynote speakers, thought leadership panels, roundtable discussions, and ample networking opportunities.

- All sponsorships include
  - Logo on all program event email communications, in our monthly newsletter and on our website.
  - Inclusion on our email distribution list
  - Invitation to attend social events (happy hours, sporting events, etc.)
    - Headline Sponsor: \$11,000 x1
    - Keynote Sponsor: \$5,500
    - Lunch Table Sponsor: \$2,250 x2
    - Happy Hour Sponsor: \$3,300 x1
    - WiFi Sponsor: \$2,250 x1
    - Roundtable Sponsor: \$1,700 x1

**Please see appendix for the full sponsorship package.**

REACH - 700+ Members plus 110-150 live attendees



# Upcoming Events

## SEPTEMBER

- 9/21/2023 12pm-2pm **Simplify ETF Educational Seminar, The Pacific Club**
- 9/28/2023 | 5:30 - 9:30 pm | **21st Social Annual Baseball Social**

## OCTOBER

- 10/19/2023 | 5:00 - 7:00 pm | **Invest in Yourself Series- Happy Hour at Red-O**
- 10/12/2023 | 4:00 - 6:30 pm | **The State of Orange County, Balboa Bay Club** 

## NOVEMBER

- 11/16/2023 | 5:00 pm - 7:00 pm | **Invest in Yourself Series- Happy Hour- Corona Del Mar Area**
- 11/30/2023 | 4:00 pm - 6:00 pm | **Pickleball Tournament**

## DECEMBER

- 12/12/2023 | 5:00 pm - 9:30 pm | **Annual Charterholder Dinner, Balboa Bay Club** 

## JANUARY

- 1/18/2024 | 5:00 pm - 7:00 pm | **Invest in Yourself Networking Series - Happy Hour**

## FEBRUARY

- 2/15/2024 | 5:00 pm - 7:00 pm | **Invest in Yourself Networking Series- Happy Hour**
- Date TBD | **CFA Institute Research Challenge**

## MARCH

- 3/21/2024 | 5:00 pm - 7:00 pm | **Invest in Yourself Networking Series- Happy Hour**

## APRIL

- 4/25/24 | 5:00 pm - 9:00 pm | **Wealth Management Symposium, Costa Mesa Hilton** 
- 4/18/2024 5:00 pm - 7:00 pm | **Invest in Yourself Networking Series- Happy Hour**

# Upcoming Events

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## MAY

- **TBD Annual Membership Meeting**
- 5/16/2024 | 5:00 - 7:00 pm | **Invest in Yourself Series- Happy Hour**

## JUNE

- **6/6/2024 Golf Tournament at Tijeras Creek with FPAOC**
- **6/20/2024 | 5:00 - 7:00 pm | Invest in Yourself Series- Happy Hour**

## JULY

- 7/18/2024 | 5:00 - 7:00 pm | **Invest in Yourself Series- Happy Hour**



**State of Orange County  
October 12, 2023, Balboa Bay Club**

Hosted at the luxurious Balboa Bay Club. This 2.5 hour event includes speakers, thought leaders, roundtable discussions, and ample networking opportunities.

- **Headline Sponsor (\$5,000 - one available )**

- Exclusive sponsor logo on all event communications and prominent sponsor display throughout the entire event
- Four attendees
- Opportunity for sponsor's representatives to speak briefly at the event
- Contact information for attendees whom opt-in to receive sponsor communications
- Full-page ad in the event program plus marketing collateral featured on Sponsors Reception Table

- **Food & Beverage (\$3000 - one available)**

- Opportunity for sponsor's representatives to speak briefly at the event
- Contact information for attendees whom opt-in to receive sponsor communications
- Two attendees
- Half-page ad in the event program plus marketing collateral featured on Sponsors Reception Table

- **Roundtable (\$2000 - three available)**

- Sponsor logo on all event communications and prominent sponsor display at two-hour conference happy hour
- One attendee

- **Parking (\$1000 - one available)**

- Sponsor logo on all event communications and prominent sponsor display at two-hour conference happy hour



Hosted at the luxurious Pacific Club. This half-day event includes keynote speakers, thought leadership panels, roundtable discussions, and ample networking opportunities.

- **Headline Sponsor (\$11,000 - one available )**

- Exclusive sponsor logo on all event communications and prominent sponsor display throughout the entire event
- Sole exclusive sponsor booth with marketing collateral and up to four sponsor attendees
- Opportunity for sponsor's representatives to speak on a panel plus host two roundtables at afternoon roundtables (two 45-minutes sessions)
- Contact information for attendees whom opt-in to receive sponsor communications
- Full-page ad in the event program plus marketing collateral featured on Sponsors Reception Table

- **Keynote Sponsor (\$5,500 - one available)**

- Sole keynote lunch speaker with marketing collateral distributed to lunch attendees
- Opportunity for a sponsor representative to speak on a panel plus host one roundtable at afternoon roundtables (two 45-minutes sessions)
- Complimentary attendance for two sponsor representatives at lunch and Happy Hour
- Half-page ad in the event program plus marketing collateral featured on Sponsors Reception Table

- **Lunch Table Sponsor (\$2,250 - two available)**

- Sponsor logo on all event communications and prominent sponsor display at two-hour conference happy hour
- Inclusion on our email distribution list
- Invitation to attend social events (happy hours, sporting events, etc.)

- **Happy Hour Sponsor (\$3,300 - one available)**

- Sponsor logo on all event communications and prominent sponsor display at two-hour conference happy hour
- Complimentary attendance for two sponsor representatives at Happy Hour reception

- **WiFi Sponsor (\$2,250 - one available)**

- Logo on all program event email communications, in our monthly newsletter and on our website.
- Inclusion on our email distribution list
- Invitation to attend social events (happy hours, sporting events, etc.)

- **Roundtable Sponsor (\$1,700 - one available)**

- Sponsor logo on all event communications and sponsor logo display on roundtables
- Opportunity for sponsor's representatives to host a roundtable at afternoon roundtables (two 45-minutes sessions)
- Complimentary attendance for one sponsor representative per table sponsorship
- Marketing collateral featured on Sponsors Reception Table





# Contact Us

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## Sponsor Information

We have several different sponsor levels available to give you every opportunity to interact with our members of the course of the year. Sponsorships will be granted on a first-come, first-serve basis in regard to the limited spots available for each level. We are also offering sponsors the ability to participate in exclusive-sponsored events. Please contact [sponsorship@cfaoc.org](mailto:sponsorship@cfaoc.org) for more details. Thank you for your interest in sponsorship opportunities for CFA Society Orange County.

## Sponsorship Check-out Form

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<b>Name</b>		
<b>Company</b>		
<b>Mailing Address</b>		
<b>City State Zip</b>		
<b>Email Adress</b>		
<b>Please Sign Me Up For...</b>		
<b>I'd Like To Pay By (Circle one)</b>	<b>CREDIT CARD, PLEASE INVOICE ME</b> <b>CHECK PAYABLE TO</b> CFA SOCIETY ORANGE COUNTY 4533 MacArthur Blvd. Suite 182 Newport Beach, CA 92660	Total: \$ _____
<b>Signature</b>		



# Signature Events Sponsorships

## ANNUAL CFA / FPA OC GOLF TOURNAMENT - JUNE 2024 \$250 - \$4,500 (18 Available)

Hosted at the elite Arroyo Trabuco Golf Club in Mission Viejo. This full-day event is co-hosted with the Financial Planning Association of Orange County and includes a networking lunch, team scramble golf tournament, a golf clinic for non-tournament participants, and a networking happy hour followed by an awards ceremony. It was a hit in 2021 and is back by popular demand.

- Diamond Sponsor: \$4,500
- Platinum Sponsor: \$3,000
- Ball Sponsor & Tumbler Sponsor: \$1,000 each \$2,000 for both
- Lunch Sponsor: \$2,500
- Drink Sponsor: Golf \$1,500
- Drink Sponsor: Happy Hour + Awards: \$2,000
- Logo Sunscreen: \$1,000
- Tee Sponsor: cash or prize greater than \$250

**Please see appendix for the full sponsorship package.**

REACH - 1,000+ Members of CFAOC + FPA OC plus 110-150 live attendees including FPA Orange County Members

