



**CFA Society
Hartford**

**NEW
SPONSORSHIP
OPPORTUNITIES
INSIDE!**

2025 Annual Forecast Event

Connecticut Convention Center
March 6, 2025
5:00 PM - 8:30 PM

SPONSORSHIP OPPORTUNITIES



Event Overview

Join us for a 2025 Global Economic Forecast by keynote speaker Gabriela Santos

2025 Annual Forecast Event
March 6, 2025
Connecticut Convention Center 5:00 PM - 8:30 PM

Join us at the 2025 Forecast Dinner hosted by CFA Society Hartford, featuring esteemed speaker Gabriela D. Santos. This premier event will bring together Connecticut's leading investment professionals and key decision-makers for an evening of insight and networking. Established in 1954, CFA Society Hartford represents a network of over 700 investment management professionals dedicated to promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of our community.

Sponsorship Opportunities provide firm exposure at the Annual Forecast Event and on the Society website, as well as networking opportunities to engage our members and guests throughout the year at periodic luncheons and conferences hosted by the Society.

Sponsorships start at \$600.00.



AGENDA

- 4:30 PM
New Charterholder Presentation

- 5:00 PM
Networking | Social Hour | Exhibitors

- 5:15 - 5:30 PM
Private Meet & Greet
with Keynote Speaker*

- 6:00 PM
Dining Room Opens

- 6:30 PM
Dinner Served

- 6:45 PM
Welcome
Richard Razza, CFA
President, CFA Society Hartford

Keynote Speaker
Gabriela D. Santos
Managing Director,
Chief Market Strategist for the Americas,
J.P. Morgan Asset Management



Keynote Speaker

Gabriela D. Santos
Chief Market Strategist, Americas
J.P. Morgan Asset Management

Gabriela D. Santos, Managing Director, is the Chief Market Strategist for the Americas on the Global Market Insights Strategy Team at J.P. Morgan Asset Management. In this role, Gabriela provides valuable insight and perspective on the global economy and markets to institutional and retail clients across the Americas. Gabriela's research focuses on emerging markets, especially China. She is responsible for the development of the Guide to the Markets, Guide to China and Guide to the Markets – Latin America, amongst other publications.

Gabriela is also a frequent guest on CNBC, Bloomberg, and other financial news outlets and is often quoted in the financial press.

Prior to joining J.P. Morgan in 2012, Gabriela worked at HSBC's Private Bank, stationed in Singapore, Switzerland and Mexico. She held various roles including banker, structured products trader and business manager.

Gabriela graduated summa cum laude from the University of Pennsylvania with a Bachelor of Arts degree in Philosophy, Political Science and Economics, as well as French. She is fluent in English, Portuguese, Spanish and French.



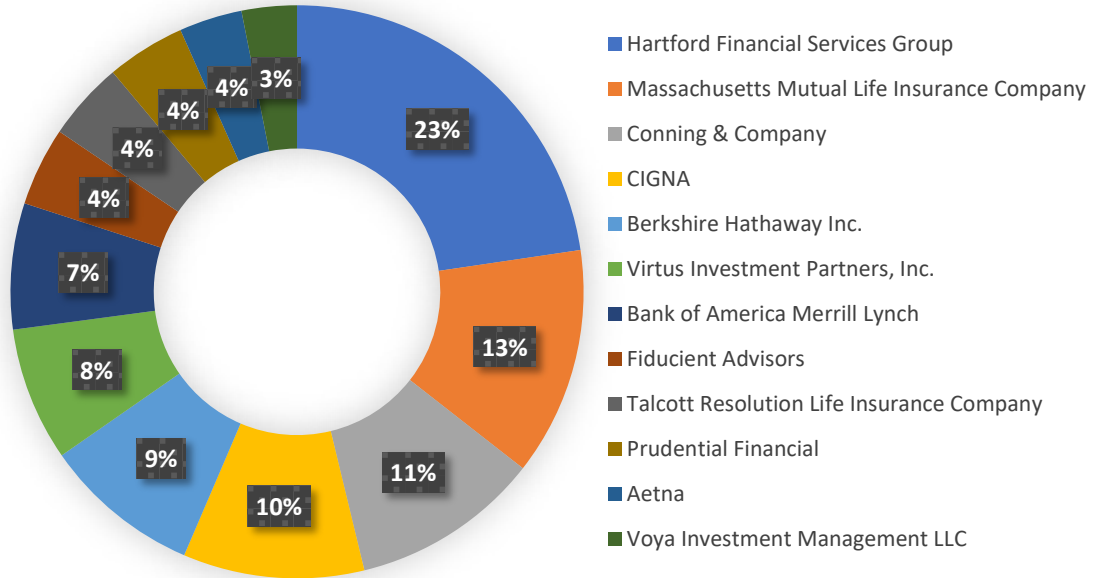
CFA Society
Hartford

ABOUT CFA Society Hartford

CFA Society Hartford is one of the leading associations of local investment professionals in Connecticut, steeped in rich history spanning over 70 years. The non-profit organization has been serving Connecticut since 1954.

TOP EMPLOYERS CFA Society Hartford Members

The Society's membership is well represented in all the leading financial institutions in the area

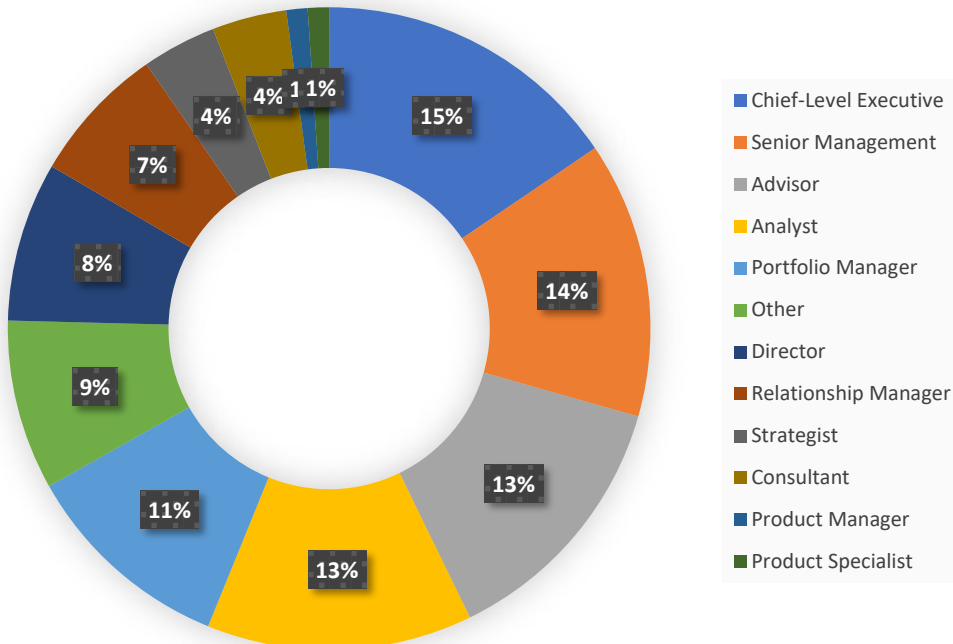


DEMOGRAPHICS Attendees

The attendee profile reflects aggregate data from the past five Annual Forecast Events.

383 | Average Investment Professional Attendees

Attendee Occupation



SPONSORSHIP

Contacts

To secure sponsorship opportunities and gain access to investment professionals attending the Annual Forecast Dinner, please contact:

Rebecca Taylor
administrator@hartfordcfa.org
 (860) 604-1411

Ian Green
 Forecast Dinner Chair and
 Vice President Advocacy
Forecast@HartfordCFA.org

SPONSORSHIP Opportunities

All benefits are dependent on the Sponsor providing the required materials and information prior to deadlines.

	Platinum \$10,000	Gold \$5,750	Silver \$3,550	Bronze \$2,550	SWAG \$2750	Social Hour \$2750
Number of Sponsorships available at each level	1	10	12	15	1	2
Pre-Event Benefits						
Pre-event marketing on website, Social Media channels, and invitations	Logo	Logo	Logo	Logo	Logo	Logo
Listing as sponsor in Annual Meeting eblasts/digital invitations	Logo	Logo	Logo	Logo	Logo	Logo
Event Benefits						
Annual Dinner guest tickets (10 guests per table) Additional tables \$1,150/each	25 Tickets 2.5 Tables	20 tickets 2 Tables	10 tickets Full Table	5 tickets 1/2 Table	2 tickets	2 tickets
Meet & Great with Keynote speaker for 1 hour with 30 guests prior to social/dinner (1 available add \$1500 - first come, first serve)	●	●				
Prime table placement of corporate sponsored tables at Annual Dinner	Front Center	Towards Center	Towards Center			
Prominent display of logo on tables as an event sponsor	●	●	●	●	●	●
Firm name, description, and logo listed in Annual Dinner Program & advertisement	Inside Front Cover	Full Page	1/2 Page	1/4 Page	1/4 Page	1/4 Page
Firm logo at bars and tables at Social Hour. Logo on napkins. Signage						●
Firm logo or name on the Swag gifts provided to attendees at the event					●	
Firm logo as a sponsor on signage at Annual Dinner Attendee Registration	●	●	●	●	●	●
Logo on signage at the entry/exit with table of Swag/Gifts for the attendees					●	
Exhibitor Table (8'x30") in Social Hour/Reception area	●	●	●	●	●	●
Firm Logo Display: projection screens will display logo image as a sponsor multiple times during program	●	●	●	●	●	●
Special recognition as a sponsor during President's Opening Remarks	Plaque	By Name	By Name	General	General	General
Post-Event Benefits						
List of attendees including Name, Company and Job Title (Name is an opt in field)	●	●				
Priority Speaker at CFA Society Hartford Education Luncheon(s)*	●	●				
Listing as sponsor in Society's post-event Newsletter and one year listing on CFA website with organization/business description.	Logo & Company Description	Logo & Company Description	Logo & Company Description	Logo	Logo	Logo

*Based on request from Sponsor and Sponsor's business alignment with program topic

CFA Charterholder Ceremony with special Speaker

A reception for the new charterholders and their guests. The newest CFA charterholders will be acknowledged and celebrated from from 4:30 - 5:00 and then at the social hour from 5:00-6:00.

SPONSORSHIP Additional Opportunities

Research Challenge Winners \$800.

- Sponsor the CFA Institute Research Challenge winning team to attend the Forecast Dinner
- Logo in Program (digital & printed)
- Signage on the table
- Only one sponsorship available

New Charterholder Table Sponsor \$1150.

- Table for New CFA Charterholders attending Forecast Dinner
- Includes 5 tickets for the sponsor's guests and 5 tickets for new CFA charterholders
- Signage on the table
- Includes 1/4 Page advertisement in Program Booklet

Program Advertising \$140-\$450.

The CFA Society Hartford Forecast Dinner program is a great place to get the word out about your company. With more than 500 printed for attendees and a digital version on website, our program advertisements reach hundreds of leading investment and financial professionals.

- We offer many advertising options to fit every budget and every need. Select from four size options
 - Half Page & Full Page Advertisers can add (1) ticket to the Forecast Dinner for an additional \$75.
- Ads are due by February 3rd.

Full Color Advertisements

Eighth Page, 1.75" High x 2.5" Wide
\$130.00

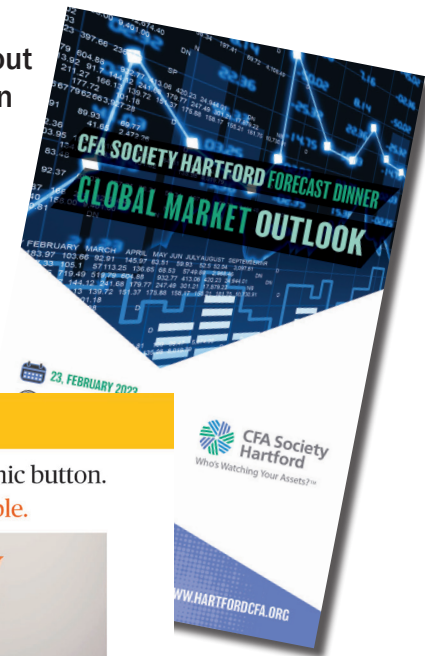
Quarter Page, 1.75" High x 5" Wide or 5" x 1.75" Wide
\$160.00

Half Page, 3.25" High x 5" Wide
\$260.00

Full Page, 7-1/2" High x 5" Wide
\$400.00

Forecast Contest \$600.

- 2025 Forecast Contest Named after Sponsor
- Ability to choose the 6 contest questions (due by February 14th)
- Logo in Program (digital & printed)
- Presented at the event for in-person
- Only one sponsorship available



GOLD SPONSORS

Don't push the panic button.
Push what's possible.



Put our institutional investment expertise to work for you.
Voya Investment Management: We help investors push what's possible through differentiated solutions across our fixed income, equity and multi-asset platforms, including private markets and alternatives.

And that's just the start.
voyainvestments.com/about-us

VOYA INVESTMENT MANAGEMENT

©2023 Voya Investments Distributor, LLC
230 Park Ave, New York, NY 10029 • All rights reserved

Voya Investment Management is the asset management business of Voya Financial overseeing assets for institutions, financial intermediaries and individual investors. Drawing on a 30-year investing legacy and the expertise of 300+ investment professionals, Voya IM strategies span public and private fixed income, equities, multi-asset solutions and alternatives. We have cultivated an award-winning culture committed to understanding and anticipating clients' needs, producing superior investment performance, and embedding diversity, equity and inclusion in everything we do.

CFA Society
Hartford
Who's Watching Your Assets?™

WWW.HARTFORDCFA.ORG

Example of an
Advertisement

REGISTRATION Forecast Dinner Event

Individual Purchase Options		On or before January 30, 2025	After January 30, 2025
Individual Tickets - Chicken/Filet Dinner	CFA Society Hartford Member	\$99	\$120
	Non-Member	\$130	\$150

Table Purchase Options	On or before January 30, 2025	After January 30, 2025
Full Table (10 tickets)	\$1150.00	\$1350.00
Half Table (5 tickets)	\$575	\$675
New Charterholder Table (5 tickets & 5 sponsored tickets for new charter holders.) Includes 1/4 Page advertisement in Program Booklet	\$1150.00	\$1350.00

Interested in purchasing a table?

Consider purchasing a table at the upcoming Forecast Dinner to seat your group together.

Each table seats up to 10 people. Purchase a half or full table. Your business name will be included on signage at the table and in the social area.

Contact Rebecca Taylor administrator@hartfordcfa.org or purchase online.

