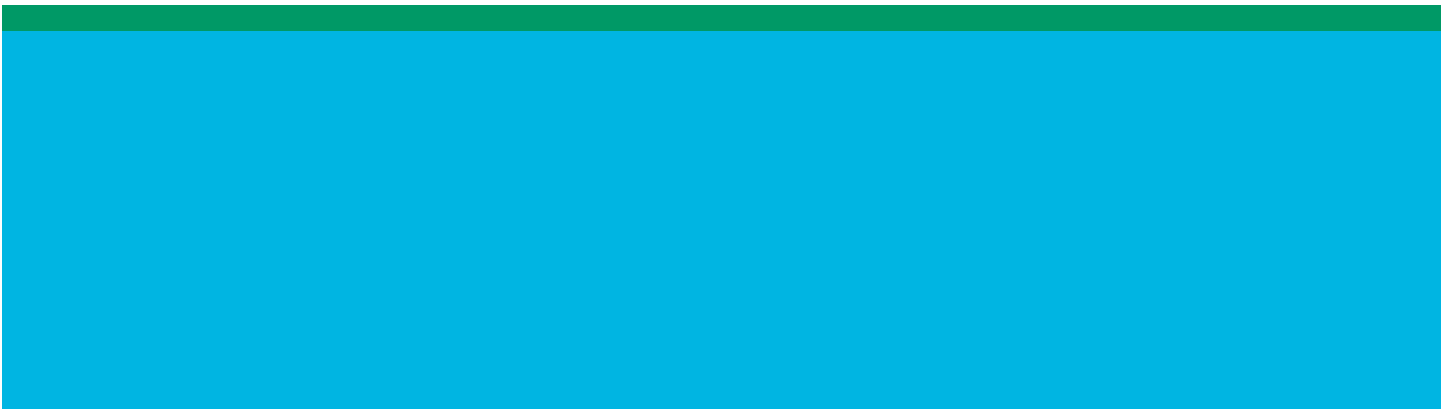


SPONSORSHIP



SPONSORSHIPS



OPPORTUNITIES

Build credibility by partnering with the premier organization for investment professionals in central Florida.

MAXIMUM EXPOSURE THROUGH MULTIPLE TOUCH POINTS

In addition to recognition at our events, sponsors may receive logo recognition through –

- Inclusion in semi-annual newsletter reaching ~3,000 professionals.
- Website logo recognition.
- Inclusion in e-mail communications to member base and community at large. CFA Society Orlando constantly reaches out to the central Florida community promoting events, conferences, partner events, etc.
- Logo recognition in all promotional materials.
- Significant website traffic driven by our social media presence. We are the most followed CFA society in the Southeastern United States on LinkedIn.



CUSTOMIZE YOUR LEVEL OF SPONSORSHIP

- Flexibility allows for annual sponsorships or single event sponsorships.
- Special packages may be available.

SPONSORSHIP BENEFITS					
Sponsorship Level	Platinum \$10,000	Gold \$6,000	Silver \$3,500	Premium Single Event \$3,500	Single Event \$1,500
Sponsorship Available	1	2	7	Varies per Event	Varies per Event
Recognition in Marketing Material	Logo	Firm Name	Firm Name	Logo on all Marketing for Event	Firm Name for Event only
Recognition at Events	Banner	Logo	Firm Name	Mention, Table with Materials	Firm Name
Website Recognition	Prominent Logo	Logo	Firm Name	On Event Page	On Event Page
Newsletter Recognition	Logo	Firm Name	Firm Name	Firm Name	-
Sponsorship Available	1	2	7	Varies per Event	Varies per Event
Tables Included (Annually)	4	2	1	2	1
Table Placement	Next to Head Table	Near Front	Near Front	Near Front	Middle to Back



ABOUT US



CFA Society Orlando

MISSION

The CFA Society Orlando is a member of the CFA Institute Global Network of Societies who's mission is to lead the finance profession in Central Florida by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of society.

LEADERSHIP

OFFICERS

Thomas Harrington, CFA
President

Steve Curley, CFA
Vice President

Kevin Reher, CFA
Treasurer

Chris Cannon, CFA
Secretary

BOARD OF DIRECTORS

Christian Craft, CFA

Colby Donovan, CFA

Frank Garcia, CFA

Jeffrey Goll, CFA

Xinxin Liu, CFA

Andrew Papke, CFA

Christina Shaffer, CFA

ADVISORY COUNCIL

Kevin Laake, CFA

F. Javier Perez, CFA

Martin Bel, CFA

Marisa Bradbury, CFA

Dan Fasciano, CFA

Gerry Lachnicht, CFA

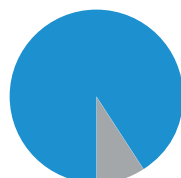
John Wilenski CFA

STATISTICS

(as of 12/19/23)

286

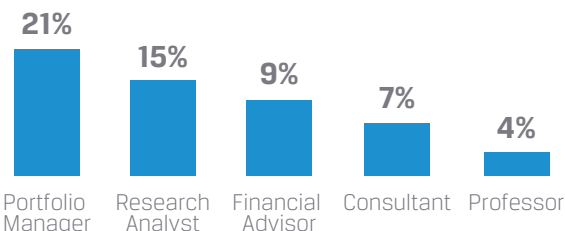
Active members



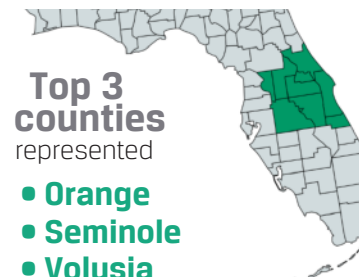
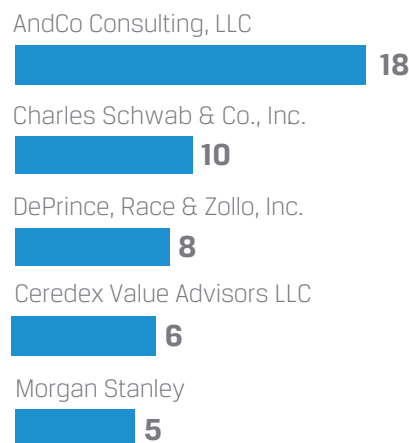
95%

Charterholders

Top 5 job functions



Top 5 employers represented



EVENTS

In FY23, CFA Society Orlando focused on offering a diverse array of top-notch speakers and local networking opportunities. Over the course of the year, we hosted 13 events—both in-person and virtual. This included seven informative programs and panels, as well as Five social gatherings such as our 2nd Annual Glow Ball Golf Tournament and our 30th Anniversary Celebration.

INVESTORS FIRST PODCAST

In 2020, the Society introduced the Investors First Podcast with the aim of educating both investors and investment professionals in Florida, across the Americas, and beyond. The podcast focuses on enhancing your understanding as an investor or advisor. Featuring subject matter experts from our Society, the show includes interviews with Founders, CEOs, Chief Investment Strategists, Federal Reserve Presidents and more to

discuss timely and relevant topics in finance. The CFA Institute awarded our Society the 2020 Impact and Innovation Award for the Investor's First Podcast.



MEMBERSHIP

Membership is open to CFA charterholders, candidates actively enrolled in the CFA Program, and individuals who have previously passed the CFA Level I exam. The annual dues for regular and affiliate members are \$100. Membership comes with a variety of benefits, including professional development, advocacy initiatives, networking opportunities, and educational resources.

GET INVOLVED

Volunteering helps you contributing to the local investment community as well as influence the direction of CFA Society Orlando and its programs.

Here are a few ways to get involved today:

- Attend an event
- Become a Board Committee Member
- Post a job (free job board for employers)
- Become a Sponsor (Annual or event)
- Speaking opportunities
- University volunteer opportunities

ANNUAL SOCIETY SPONSORS

PLATINUM



SILVER



J.P.Morgan



CONTACT US

SOCIETY EXECUTIVE: Alli Roberts
aroberts@cfaorlando.org
407-221-3443

FIND US

Website: cfasociety.org/orlando



We are proud to announce that
CFA Society Orlando is the most
followed CFA Society in the
Southeast on social media.

ABOUT CFA INSTITUTE

MISSION

CFA Institute is a global community of investment professionals working to build an investment management industry where investors' interests come first, financial markets function at their best, and economies grow.

We advocate for financial market integrity and develop and promote ethical and professional standards, such as the Global Investment Performance Standards (GIPS®) and the Asset Manager Code of Professional Conduct™, and our members uphold our industry-leading Code of Ethics and Standards of Professional Conduct.

CFA INSTITUTE STATISTICS

- Fewer than **1 in 5** candidates who begin program successfully earn the **CFA Charter**
- More than **180,000 CFA Charterholders** globally
- More than **190,000 members** in **160 countries**
- **160+ local societies worldwide**
- Global Investment Performance Standard (GIPS®) championed locally in more than **40 countries**

BECOMING A CHARTERHOLDER

The Chartered Financial Analyst (CFA) credential is the most respected and recognized investment management designation in the world. The curriculum covers academic theory, current industry practice, and ethical and professional standards to provide a strong foundation of advanced investment analysis and real-world portfolio management skills. A work experience requirement and an annual ethics statement ensure career-long professional excellence by those who have earned the CFA Charter. To find out more about the CFA Charter, please visit www.cfainstitute.org/cfaprogram.