



# **2025 ANNUAL FORECAST DINNER SPONSORSHIP BROCHURE**

Thursday January 23rd 6pm-9pm

For inquiries, please email [admin@cfasouthflorida.org](mailto:admin@cfasouthflorida.org)

# ABOUT US



# CFA Society South Florida

## MISSION

The CFA Society of South Florida is a member of the CFA Institute Global Network of Societies. Our mission is to lead the investment profession locally by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of our stakeholders, including members, investment professionals, and investors.

## VISION

CFA Society South Florida aspires to:

- **Serve local finance professionals** seeking education, knowledge, professional development, connection, or inspiration.
- **Influence the local investment profession** with ethics and excellence of practice.

## OBJECTIVES

- Be the leading local association for investment professionals.
- Deliver timely and relevant educational events.
- Develop strategic alliances to strengthen the Society's role as an agent of change in the community.

# OUR MEMBERS

**500+** Financial professionals

## Top Member Employers

- **Nextera Energy, Inc**
- **Franklin Templeton Investments**
- **Northern Trust**
- **Wells Fargo**
- **JP Morgan Chase**
- **Polen Capital Management, Inc**
- **Morgan Stanley Smith Barney**
- **Bank of America/Merrill Lynch**

## Top 5 occupations

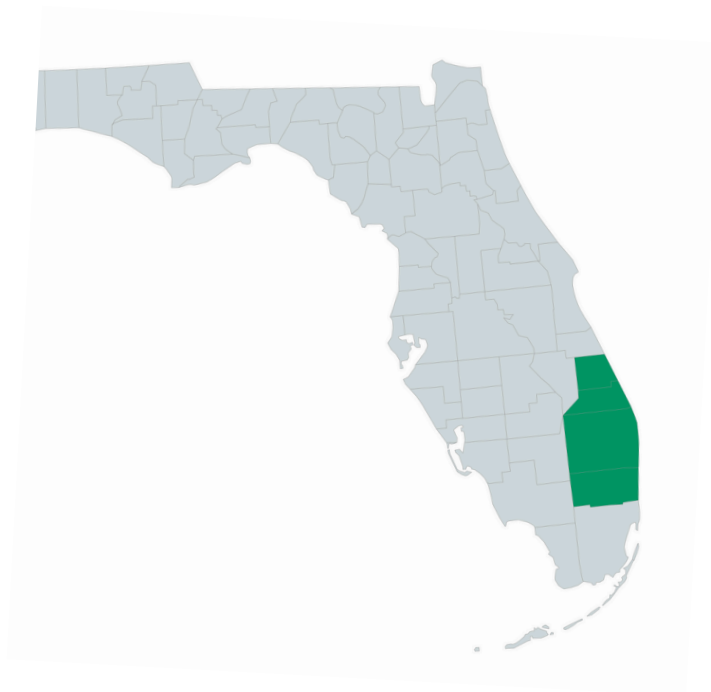
- **Portfolio Manager**
- **Private Wealth Manager**
- **Investment Analyst**
- **Corporate Finance / M&A**
- **Strategy Consulting**

# SERVING THE COMMUNITY

The CFA Society of South Florida is a 501(c)(6) tax-exempt educational and service organization for members. We connect individuals.

We offer tax-deductible sponsorship opportunities for those seeking access to noteworthy industry leaders, financial professionals, and CFA charterholders.

If you want to build brand awareness among a prestigious demographic, consider a sponsorship package today!



[LinkedIn](#)

[Twitter](#)

[Instagram](#)

[www.cfasociety.org/southflorida](http://www.cfasociety.org/southflorida)

# ANNUAL FORECAST DINNER SPONSORSHIP OPPORTUNITIES

We offer several tiers of sponsorship opportunities to help build brand awareness amongst the preeminent investment professionals in South Florida. Sponsorships are offered on a first-come, first-serve basis.

Annual Sponsorships are available as well, please request the annual sponsorship brochure if interested.

Sponsorship Type	Feature Event Sponsor	Cocktail Hour Sponsor	Dessert Sponsor	Table Sponsor
Commitment	\$7,000	\$4,000	\$2,000	\$1,200
Sponsorships Available for the Event	1	1	1	5
Tables Included For Event	1	NA	NA	1
Tickets Included for Event	8 (one for each seat at the included table)	2	1	8 (one for each seat at the included table)
Table Placement	Front of Venue	NA	NA	Front of Venue
Recognition in Marketing Material	Firm Logo with Website Link	Firm Logo with Website Link	Firm Logo with Website Link	Firm Name/Logo for Event
Recognition at Forecast Dinner	Talk Time, Head Logo on Posters & Slide Show, recognized at the start of the program	Logo on Posters and Slideshow, recognized during cocktail hour	Logo on Posters and Slideshow, recognized during dessert	Logo at Table & on slideshow



**CFA Society  
South Florida**