

# PORTFOLIO

The West Coast's Premier Investment Conference

JW Marriott Hotel at L.A. Live, Los Angeles, CA

May 7, 2020



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**SPONSORSHIP**  
**OPPORTUNITIES**

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### JW MARRIOTT AT L.A. LIVE

900 W. Olympic Blvd., Los Angeles, CA 90015

- 7:00 am . . . . . Continental Breakfast & Registration
- 8:00 am . . . . . Speakers & Panel Discussions
- 12:00 pm . . . . . Lunch & Guest Speaker
- 1:00 pm . . . . . Breakout Sessions & Panel Discussions
- 4:20 pm . . . . . Closing Keynote Presentation
- 5:00 pm . . . . . Cocktails & Networking

### 2019 CONFERENCE SPEAKERS

**Richard Bernstein**, CEO/CIO, Richard Bernstein Advisors, LLC

**Jane Wells**, CNBC

**Jay Wintrob**, CEO, Oaktree

**Michael Lewis**, *New York Times* Bestselling Author

... and more.

For a complete list, visit [www.portfolioconference.com](http://www.portfolioconference.com)

### Key Benefits

- Maximize exposure at CFA Society Los Angeles' event.
- Position your firm as an industry leader.
- Generate new leads and prospects to grow your business.
- Cultivate relationships with key clients.
- Enhance credibility with a respected organization.
- Build market presence and brand awareness.

### About CFALA

Since 1931, CFA Society Los Angeles (CFALA), has worked to promote integrity, professional excellence and engagement among its members and within the community through continued education, career development and professional networking opportunities, to ultimately achieve an investment industry where investors' interest come first, markets function at their best, and economies grow.

### Event Overview

PORTFOLIO is an immersive all-day event geared toward the local investment community and beyond, brought to you by CFA Society Los Angeles. PORTFOLIO will provide attendees the opportunity to accelerate knowledge acquisition, participate in relevant topic debates and dialogs, and network with fellow practitioners. Attendees will be provided with unique access to local and global thought leaders through an array of speaker showcases, discussion panels and breakout sessions.

PORTFOLIO aims to broaden understanding and inspire debate within our community, providing exclusive insights into the current investment landscape and examining the future of our industry by exploring the leading edge in portfolio theory, FinTech, emergent opportunities and much more. Be sure to join your colleagues at our 2nd annual event that is on its way to becoming the premier summit for enhancing the breadth and depth of knowledge of Southern California's investment professionals.

# DEMOGRAPHIC PROFILE

## CFALA Member Profile

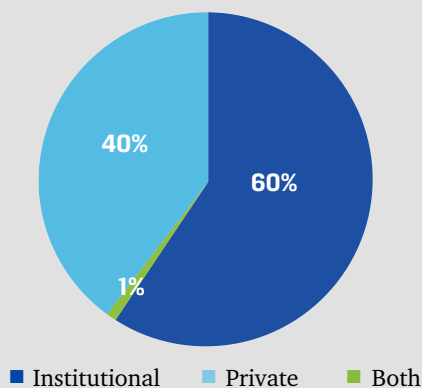
**95%** . . . . CFA Charterholders  
**18%** . . . . Female  
**82%** . . . . Male  
**47** . . . . . Average age

## Breakdown of 2019 Attendees (approx. 500 total)

Fund Company . . . . .28%  
 RIA . . . . .23%  
 Wealth Manager . . . . .14%  
 Service Provider . . . . .10%  
 Institutional/Pension . . .6%  
 Asset Manager . . . . .5%  
 Consultant . . . . .3%  
 CPA . . . . .2%  
 Education . . . . .2%  
 Government . . . . .2%  
 Family Office . . . . .1%  
 Multi-Family Office . . .1%  
 Trade Association . . . .1%  
 Private Equity Firm . . .1%  
 Venture Capital . . . . .1%

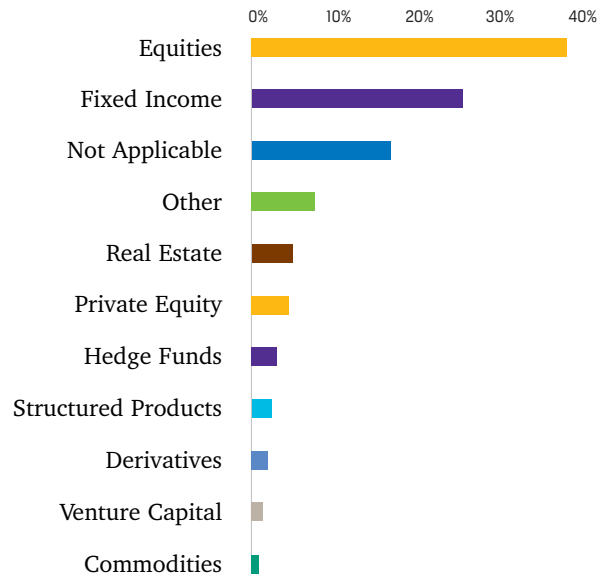
## CFALA Primary Asset Base

As of May 31, 2019



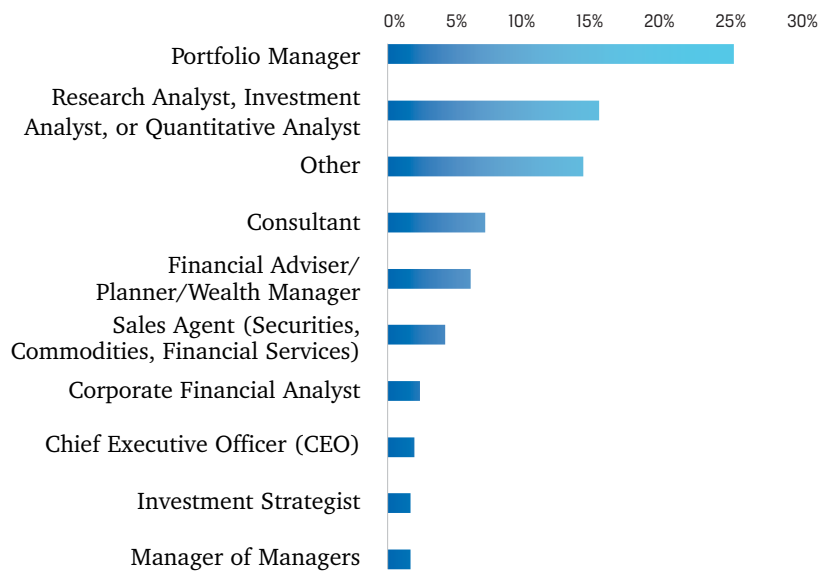
## CFALA Primary Investment Practice

As of May 31, 2019



## CFALA Member Job Functions

As of May 31, 2019



## YOUR OPPORTUNITY TO SHINE

**Sponsorship provides an excellent way to spotlight your company to current and potential clients.** As a sponsor you will receive the benefits below and recognition as a unique member of a special community. We are offering 5 levels of sponsorship.

Benefits	Platinum <i>1 available</i>	Gold <i>2 available</i>	Silver <i>5 available</i>	Bronze <i>7 available</i>	Business <i>10 available</i>
	<b>\$25,000</b>	<b>\$15,000</b>	<b>\$10,000</b>	<b>\$5,000</b>	<b>\$3,500</b>
Sponsor's name displayed on website and marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Exhibit Space	10' x 10'	10' x 10'	10' x 10'	10' x 10'	6' Table
Company Listing on all printed materials at Conference	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
"Opt-In" Attendee Information	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sponsor's logo on Conference signage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Panel Speaker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Podium recognition	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Recognition as Featured Sponsor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
VIP Meet & Greet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Recognition as Lead Sponsor	<input checked="" type="checkbox"/>				
Conference registrations	10	8	6	4	2
Program advertisement	Full page	1/2 page	1/2 page	1/4 page	-
Showcase intellectual capital (15 min)	<input checked="" type="checkbox"/>				
Reserved Table LUNCH	<input checked="" type="checkbox"/>				

