



CFA SOCIETY LOS ANGELES PRESENTS
FIRST WEDNESDAYS
THE WEALTH MANAGEMENT EXCELLENCE SERIES

First Wednesdays: The Wealth Management Excellence Series is designed for thought-leaders in the advisory community who want to bend the curve, not just stay ahead of it. The intent of the program is to learn about and analyze cutting-edge strategies to generate market-leading client results and share the next level of evolution in practice management. Attendees will include C-suite executives of family offices and RIAs, leading financial advisors, investment managers, business managers, and other top private wealth industry professionals.

This 4-part series is designed to address the issues, concerns and interests of wealth management practitioners. Meeting in select months on the first Wednesday from March through December, this highly successful program in Los Angeles will be led by a dynamic team of industry experts. Register for individual sessions or the entire series. *Don't miss out!*

SCHEDULE OF EVENTS

All events will be held from 4 pm - 7pm

March 4 Behavioral Finance

June 3 Branding You: A look into Financial Advisor Brands, both at the personal level and the firm level.

September 2 . . . A Macroeconomic Dive into California's Economy - How our home state is the engine that drives the United States - just in time for Decision 2020!!

December 2 . . . Taxes

	Session	Series*
Members	\$25	\$75
Non-Members	\$50	\$175

For dates, locations and more information for each topic visit

www.cfala.org





FIRST WEDNESDAYS SPONSORSHIP OPPORTUNITIES

CFALA'S YEAR-LONG WEALTH MANAGEMENT EXCELLENCE SERIES
Join on us every other month on the 1st Wednesday
March – December 2020 | 4 pm - 7 pm

KEY BENEFITS

- Maximize exposure throughout the year-long series
- Target a select, high-value group of industry professionals
- Enhance credibility with a respected organization
- Build market presence and brand awareness
- Firm name/logo included in press release, event program, signage and more
- Promotion to all CFALA members and 15K+ marketing list including: portfolio managers, pension fund advisors, analysts, executives and business owners
- Great networking opportunities

CFALA MEMBER PROFILE

- 95% CFA Charterholders
- 18% Female
- 82% Male
- 46 Average Age

Excitement is building amongst our members and constituents as word gets out that CFA Society Los Angeles is continuing its highly successful **Wealth Management Excellence Series** for 2020. Led by a dynamic team of industry experts and senior wealth management professionals, the committee has already put together a list of cutting edge, engaging and educational topics that you can be part of by becoming a sponsor. Heighten the visibility of your company by partnering with CFALA and reaching the audience that you want to reach: C-suite executives of family offices and RIAs, leading financial advisors, investment managers, business managers, and other top private wealth industry professionals.

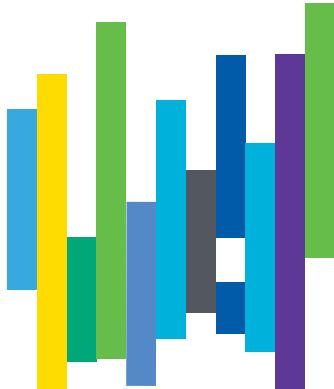
Series Sponsor | \$3000 (Only 8 available)

Benefits include: Two tickets to each event (transferable); Sponsor table at each event to highlight 1 piece of your organization's collateral; Opportunity to do a 2-minute introduction of you and your company on your "host date;" Consistent logo visibility on website, online promotions, and signage.

Host Sponsor | in kind contribution by hosting (only 1 available)

If your firm has room for 100+ attendees, host one of the sessions at your firm! Host Sponsors will provide the event venue and light refreshments. Benefits include: Two tickets to each event (transferable and up to five on your host date); Opportunity to do a 2-minute introduction of you and your company on your "host date;" Consistent logo visibility on website, online promotions and signage.

SPONSORSHIPS AVAILABLE		
Sponsorship Level	Series	Host
Number Available	8	1



Don't miss out on this unique opportunity to be part of CFALA's successful Wealth Management Excellence Series. Contact CFALA for more information.



CFALA presents FIRST WEDNESDAYS, The Wealth Management Excellence Series 2020

SPONSORSHIP REGISTRATION & PAYMENT FORM

Register to be a Sponsor by faxing completed forms to 213.613.1233 or emailing to laura@cfala.org, and mailing payments to 520 South Grand Avenue, Suite 655, Los Angeles, CA 90071. You may also register and pay online at www.cfala.org

Please print or type:

Company _____

Principal Contact Person _____

Address _____

City _____ State _____ Zip _____

Telephone () _____ Fax () _____

Email Address _____

Schedule of Events

Please indicate sessions that you could potentially host or for which you could provide speaker or moderator.

- Mar 4 Behavioral Finance**
- Jun 3 Branding You: A look into Financial Advisor Brands, both at the personal level and the firm level.**
- Sep 2 A Macroeconomic Dive into California's Economy - How our home state is the engine that drives the United States - just in time for Decision 2020!!**
- Dec 2 Taxes**

SPONSOR LEVEL

Series Sponsor **\$3,000**

Host Sponsor **In Kind**

Check here if you wish to receive an invoice

Check here to receive a W-9

Visit www.cfala.org to pay online.

FOR SPONSORSHIP INQUIRIES, contact Laura Carney at 213.613.1503, x701, or laura@cfala.org.

Please email logos to laura@cfala.org. Vector files (eps) are preferred, but hi-res (300 dpi) .tif or .jpg are acceptable.



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