



CFA Society  
Los Angeles

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 10-part series is designed to address the issues, concerns and interests of wealth management practitioners. Meeting on the first Wednesday of each month from February through November, this first-of-its-kind program in Los Angeles will be led by a dynamic team of industry experts. Register for individual sessions or for the entire series. *Don't miss out!*

## SCHEDULE OF EVENTS

All events will be held from 4 pm - 7pm

- February 3** . . . . .CIO Discussion (and Debate): Economic Outlook and Market(s) Forecast
- March 2** . . . . .The Next Five Years: Asset Allocation and Portfolio Positioning
- April 6** . . . . .Active Equities vs. Passive vs. Smart Beta in a Taxable Environment
- May 4** . . . . .Incorporating Institutional Best Practices in a Wealth Management Practice
- June 1** . . . . .Spring Mixer: RIAs, Family Offices and Wealth Managers; bonus speech: The Future of Wealth Management
- July 6** . . . . .Double Live Debate:  
Liquid Alternatives: Is 50/30/20 the new 60/40?  
Are Hedge Funds Poised to Outperform?
- August 3** . . . . .Problem Solving with Annuities –Longevity/Deferred/Variable: What to Look For and What To Look Out For
- September 7** . . . . .Advanced Estate Planning as Part of Wealth Management Practices
- October 5** . . . . .Advanced Philanthropy and ESG: Meeting Client Social Goals While Optimizing Investment and Tax Results
- November 2** . . . . .Robo Advisors and the Future of the Wealth Management Business & "So You Want To Start an RIA?"

	Session	Series
<b>Members</b>	\$20	\$150
<b>Non-Members</b>	\$30	\$250

For dates, locations and more information for each topic visit

[www.cfala.org](http://www.cfala.org)



# FIRST WEDNESDAYS SPONSORSHIP OPPORTUNITIES

## CFALA'S YEAR-LONG WEALTH MANAGEMENT EXCELLENCE SERIES

Join on us on the 1st Wednesday of every month

February – November 2016 | 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

91%	CFA Charterholders
17%	Female
83%	Male
44	Average Age
18	Average years in Industry

Excitement is building amongst our members and constituents as word gets out that CFA Society Los Angeles is launching its inaugural **Wealth Management Excellence Series** for 2016. 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 | \$2500** (Only 10 available)

Benefits include: Two tickets to each event (transferable); Opportunity to provide one speaker OR introduce one panel; Consistent logo visibility on website; Online promotions; and Signage.

**Host Sponsor | in kind contribution by hosting** (only 8 available)

If your firm has room for 50 - 75 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 provide one speaker OR introduce one panel; Consistent logo visibility on website; Online promotions; and Signage.

**Reception Sponsor | \$4000** (only 1 available)

Benefits include: 10 reception tickets to selected date, plus two tickets to each event (transferable); Opportunity to provide one speaker OR introduce one panel; Consistent logo visibility on website; Online promotions; and signage.

**Media Sponsor | \$5000** (only 1 available)

Limited to just one media organization, this exclusive opportunity combines the Series Sponsor benefits with even more exposure and visibility.

### SPONSORSHIPS AVAILABLE

Sponsorship Level	Series	Host	Reception	Media
Number Available	10	8	1	1

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

