



Sponsorship Opportunities



The West Coast's Premier Investment Conference

The Omni Los Angeles at California Plaza
October 30, 2025

The Omni Los Angeles at California Plaza

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 General Session
 5:00 pm Cocktails & Networking



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

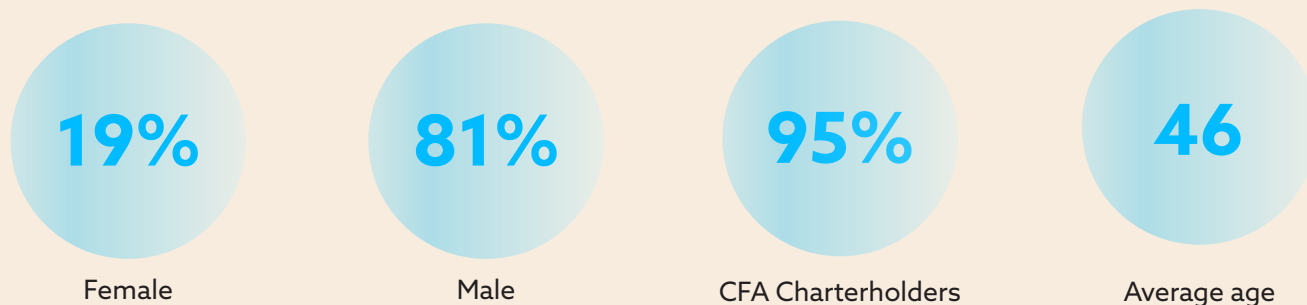
PORTFOLIO 2025 is CFA Society Los Angeles' signature all-day immersive experience designed for the local and broader investment community. As markets continue to evolve amidst rising trade tensions, shifting monetary policy, and transformative technological disruption, PORTFOLIO offers a vital opportunity to stay ahead of the curve.

This year's event will deliver dynamic content through a curated mix of keynote speakers, expert-led panels, and interactive breakout sessions. Attendees will gain direct access to local and global thought leaders discussing the most pressing challenges and compelling opportunities across the investment spectrum.

Covering both traditional and alternative asset classes, PORTFOLIO 2025 will explore the strategies shaping investment decision-making today and the vehicles investors are using to implement them. Topics will address global macroeconomic trends, regulatory developments, the integration of artificial intelligence in portfolio management, and how allocators are building their portfolios in today's market environment.

Join your peers for a day of deep insights, forward-looking dialogue, and unparalleled networking. **PORTFOLIO is not just an event—it's where Southern California's investment professionals come to challenge perspectives, connect ideas, and lead the future of finance.**

CFALA Member Profile



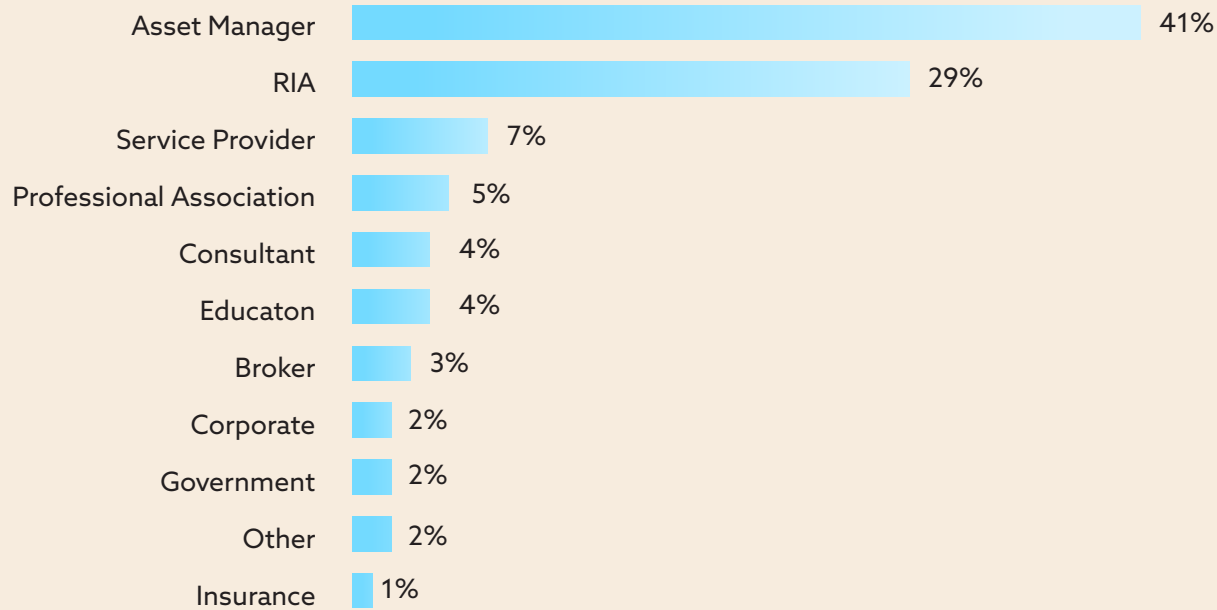
CFALA Member Job Functions

[as of April 11, 2025]

Portfolio Manager	24%
Research, Investment, Credit, or Quantitative Analyst	23%
Financial Adviser/Planner/Wealth Manager	16%
C- Suite (CEO, CIO, CFO)	13%
Client Service or Relationship Management	5%
Corporate Financial Analyst	4%
Sales Agent (Securities, Commodities, Financial Services, Institutional)	4%
Consultant/Institutional Investment Consultant/Strategy Consulting	3%
Investment Strategist	3%
Accountant/Auditor	3%
Other	1%
Professor/Academic	1%

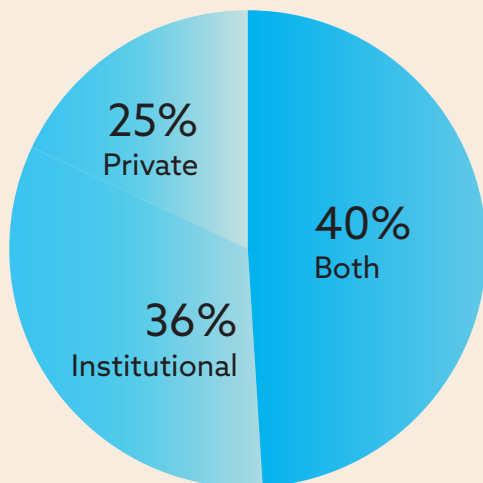
PORTFOLIO Attendee Firm Type

[2024 PORTFOLIO Conference]



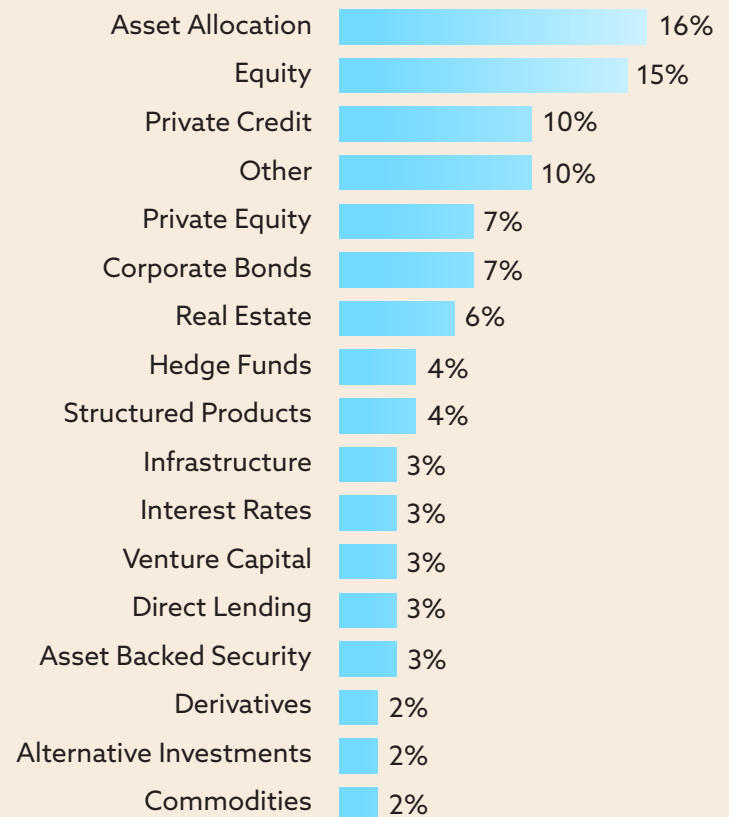
PORTFOLIO Attendee Asset Base

[2024 PORTFOLIO Conference]














































PORTFOLIO Attendee Primary Investment Practice

[2024 PORTFOLIO Conference]



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 1 available	Gold 2 available	Silver 5 available	Bronze 8 available	Business 12 available
	\$25,000	\$15,000	\$10,000	\$6,000	\$4,000
Sponsor's name displayed on website and marketing					
Exhibit Space	10' Exhibit Space	6' Table	6' Table	6' Table	Hi Top
Conference registrations	10	8	6	4	1
"Opt-In" Attendee Information					
Sponsor's logo on Conference signage					
Social media mentions & thank-you on CFA Society Los Angeles accounts (Twitter, Facebook, LinkedIn, Instagram)					
Recognition of Sponsors in email announcements (sent to list of over 30K finance professionals)					
Mobile App – Ad Push Notification					
Mobile App – Advertisement					
Panel Speaker					
Podium recognition					
Recognition as Featured Sponsor					
Private meeting room access for 1:1 meetings during Conference					
Showcase intellectual capital	 (15 min)	 (10 min)			
Recognition as Lead Sponsor					
Reserved Table LUNCH					
GOBO Logo – outside water feature					

Sponsorship Registration & Payment Form

Register to be a Sponsor by emailing completed forms to info@cfala.org and mailing payments to 13400 Riverside Drive, Suite 215, Sherman Oaks, CA 91423, OR register and pay online at www.cfala.org

Please print or type:

Company _____

Principal Contact Person _____

Address _____

City _____ State _____ Zip _____

Telephone () _____ Fax () _____

Email Address _____

Conference Registrant names must be submitted by **October 8, 2025**. By listing an email address you are agreeing to give CFALA permission to release the above names and email addresses to the speakers and sponsors, if requested.

Conference Registrant	Designation	Company	Email Address
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Sponsor Level

- ☐ **PLATINUM** \$25,000
- ☐ **GOLD** \$15,000
- ☐ **SILVER** \$10,000
- ☐ **BRONZE** \$6,000
- ☐ **BUSINESS** \$4,000

- ☐ Check here if you wish to receive an invoice
- ☐ Check here to receive a W-9

Reservation and Payment

Payment Amount: \$ _____

Payment Type: ☐ Check Enclosed ☐ Online payment

For ACH instructions, contact our office at laura@cfala.org

For sponsorship inquiries, contact **Laura Carney** at **213.613.1503, x1**, or laura@cfala.org. Sponsorship registration, company logos and specifications must be received by the CFALA Office by Wednesday, **October 8, 2025**.

Please email logos to laura@cfala.org. Vector files (eps) are preferred, but hi-res (300 dpi) .tif or .jpg are acceptable. Logos not received by the due date are not guaranteed placement as listed in the Sponsorship agreement.