



PORTFOLIO

The West Coast's Premier Investment Conference

The Omni Los Angeles at California Plaza

October 26, 2023



SPONSORSHIP OPPORTUNITIES

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

Tentative

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 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

19% Female

81% Male

46 Average age

Breakdown of 2022 Attendees

PM19%

Sales19%

Wealth Manager/
Financial Advisor13%

Other12%

Chief Investment Officer11%

Analyst9%

Strategist8%

Consultant4%

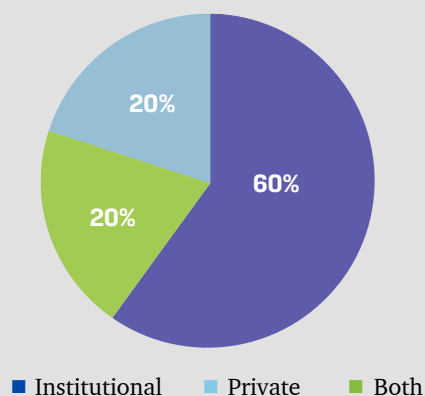
Operations3%

Risk Manager1%

Trader1%

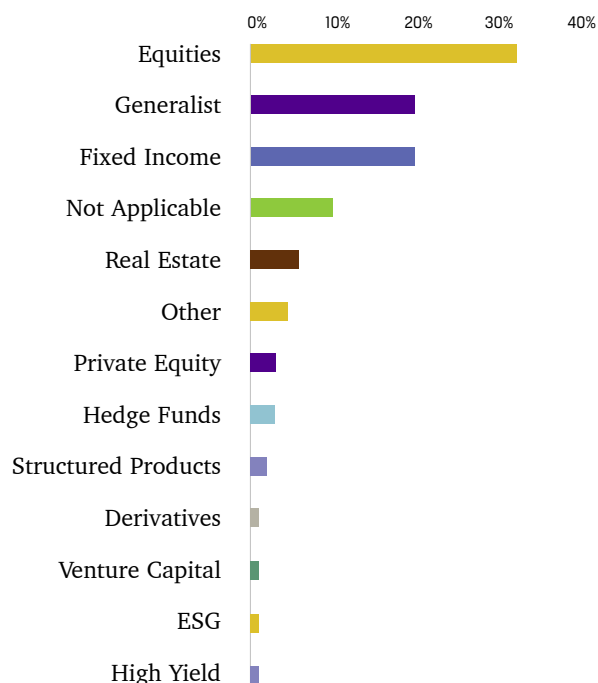
PORTFOLIO 2022 Attendee Asset Base

As of May 2022



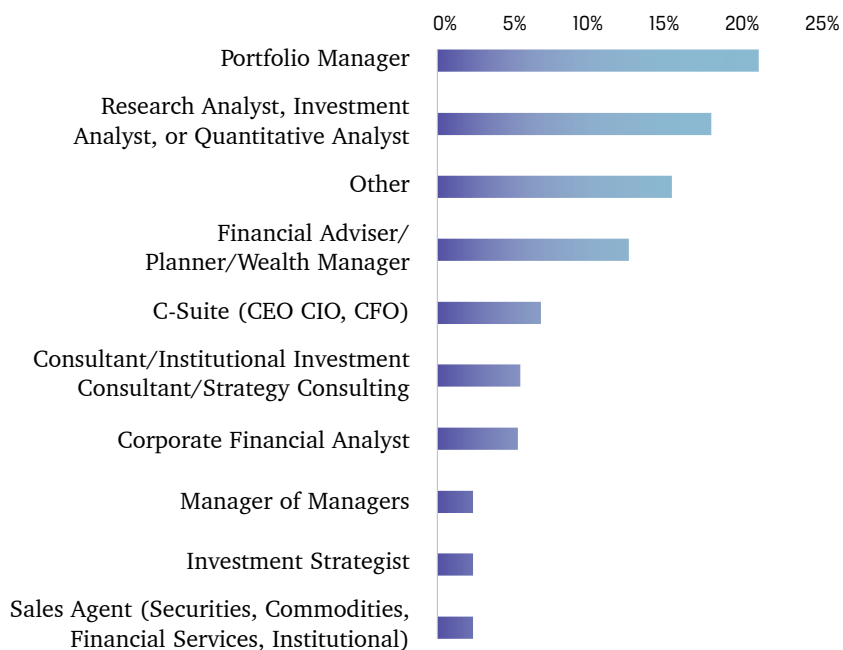
CFALA Primary Investment Practice

As of March 10, 2023
















































CFALA Member Job Functions

As of March 10, 2023



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 SOLD OUT</i>	Gold <i>2 available</i>	Silver <i>5 available</i>	Bronze <i>7 available</i>	Business <i>10 available</i>
	\$25,000	\$15,000	\$10,000	\$6,000	\$4,000
Sponsor's name displayed on website and marketing					
Exhibit Space	6' Table	6' Table	6' Table	6' Table	6' Table
Conference registrations	10	8	6	4	2
Company Listing on all printed materials at Conference					
"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					
Recognition as Lead Sponsor					
Showcase intellectual capital (15 min)					
Reserved Table LUNCH					

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 19, 2023**. 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.

<i>Conference Registrant</i>	<i>Designation</i>	<i>Company</i>	<i>Email Address</i>
_____	_____	_____	_____
_____	_____	_____	_____
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_____	_____	_____	_____

SPONSOR LEVEL

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

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 **Friday, September 15, 2023**.

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.

- ☐ 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
☐ American Express ☐ Mastercard/ VISA

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

Account Number _____
(for fax payment only)

Name on Account _____

Expiration Date _____

Signature _____