



Sponsorship Opportunities



The West Coast's Premier Investment Conference

The Omni Los Angeles at California Plaza
November 10, 2026

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 2026 is CFA Society Los Angeles' premier signature all-day immersive experience, purpose-built for the local and global investment community. As markets navigate a complex convergence of shifting monetary policy, accelerating technological disruption, and heightened geopolitical volatility, PORTFOLIO offers a vital platform to stay ahead of the curve.

Featured Track: AI & Infrastructure

This year, we are spotlighting the physical and digital convergence with a dedicated AI & Infrastructure Track. This immersive session will examine the explosive growth and capital requirements of data centers, the power grid, and the massive infrastructure build-out necessary to sustain the AI revolution. Attendees will explore the practical applications of AI—from machine learning to agentic models—that are redefining investment workflows, operational efficiency, and real-time decision-making.

Key Themes

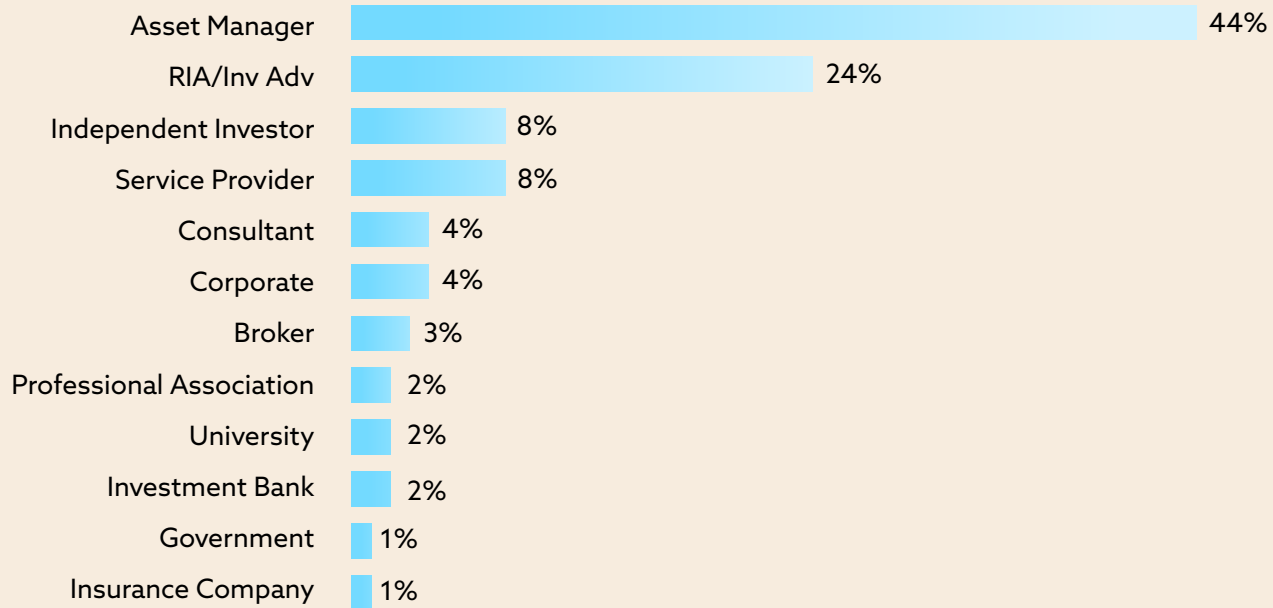
Beyond our dedicated track, PORTFOLIO 2026 offers a curated mix of keynote speakers, expert-led panels, and interactive breakout sessions addressing the critical forces reshaping the investment landscape:

- **The Active vs. Passive Debate:** A critical examination of the ongoing tension between active and passive strategies, evaluating market efficiency, alpha generation, and identifying when each approach offers the most value in a rapidly changing landscape.
- **The Energy Transition:** We delve into the investment implications of the global pivot toward a low-carbon future, with a focus on natural resources, essential commodities, and the critical development of energy infrastructure.
- **Evolution of Investment Fund Access:** We examine how the democratization of private markets and shifts in distribution are changing the game. Learn about the new vehicles investors are utilizing to access alpha, liquidity, and diverse alternative strategies.
- **Geopolitical Crossroads:** Strategic analysis of the transactional geopolitics influencing global markets, trade tensions, and supply chain shifts in an interconnected world.
- **Macroeconomic Resilience:** Expert perspectives on navigating today's interest rate environments and evolving monetary policy.
- **Portfolio Construction 2.0:** Innovative approaches to integrating hard assets, alternative strategies, and data-driven insights into robust, diversified portfolios.

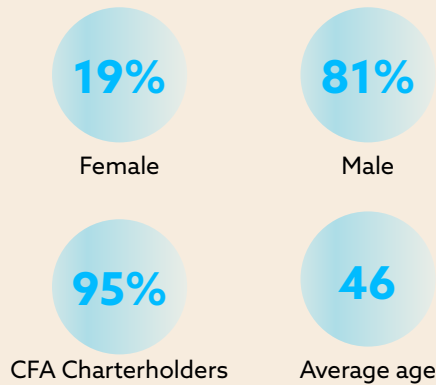
Join us at PORTFOLIO 2026 to engage with the strategies and technologies defining the next era of investment. Whether you are a charterholder, a candidate, or an investment professional, this is your opportunity to connect with peers and gain the insights necessary to drive superior outcomes.

PORTFOLIO Attendee Firm Type

[2025 PORTFOLIO Conference]

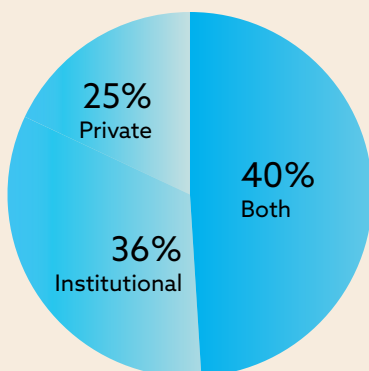


CFALA Member Profile



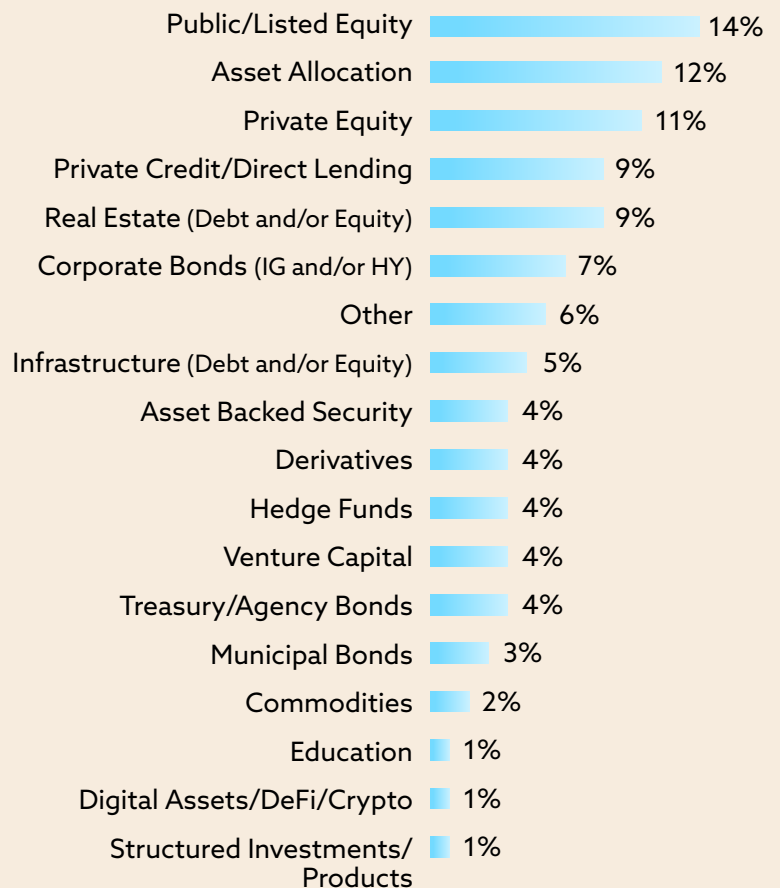
PORTFOLIO Attendee Asset Base

[2025 PORTFOLIO Conference]



PORTFOLIO Attendee Primary Investment Practice

[2025 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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Exhibit Space	10' Exhibit Space	6' Table	6' Table	6' Table	Hi Top
Conference registrations	10	8	6	4	1
"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"/>	
Social media mentions & thank-you on CFA Society Los Angeles accounts (LinkedIn, Instagram)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Recognition of Sponsors in email announcements (sent to list of over 30K finance professionals)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Mobile App – Ad Push Notification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Mobile App – Advertisement	<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"/>			
Private meeting room access for 1:1 meetings during Conference	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Showcase intellectual capital	<input checked="" type="checkbox"/> (15 min)	<input checked="" type="checkbox"/> (10 min)			
Recognition as Lead Sponsor	<input checked="" type="checkbox"/>				
Reserved Table LUNCH	<input checked="" type="checkbox"/>				
GOBO Logo – outside water feature	<input checked="" type="checkbox"/>				

