

PORTFOLIO

The West Coast's Premier Investment Conference
May 30, 2019 | Omni Hotel, Los Angeles, CA



**SPONSORSHIP
OPPORTUNITIES**

OMNI HOTEL

251 S. Olive St., Los Angeles, CA 90012

- 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 Keynote Presentation
- 5:00 pm Cocktails & Networking

CONFERENCE SPEAKERS

Richard Bernstein, *CEO/CIO*, Richard Bernstein Advisors, LLC

Jane Wells, CNBC

Jay Wintrob, *CEO*, Oaktree

Rob Arnott, *Chairman*, Research Affiliates

... and more.

For a complete list, visit www.portfolioconference.com

Key Benefits

- Maximize exposure at CFA Society Los Angeles' inaugural 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 this inaugural event that is certain to become the premier summit for enhancing the breadth and depth of knowledge of Southern California's investment professionals.

DEMOGRAPHIC PROFILE

CFALA Member Profile

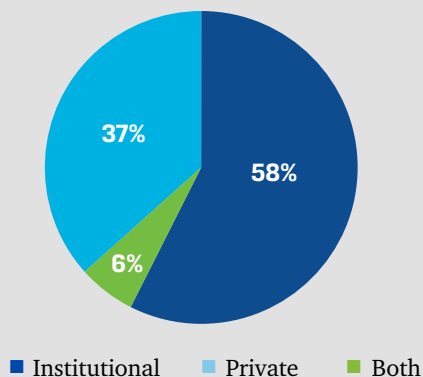
- 91%** CFA Charterholders
- 18%** Female
- 82%** Male
- 44** Average age
- 18** Average years in industry

Membership Top Employers

- The Capital Group Companies
- Legg Mason
- Wells Fargo
- Bank of America Merrill Lynch
- Payden & Rygel
- The TCW Group, Inc.
- Allianz SE
- City National Corporation
- Mitsubishi UFJ Financial Group
- Ernst & Young

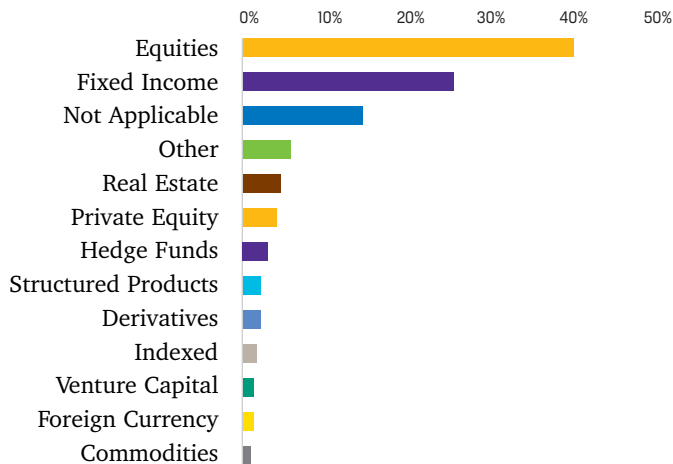
Primary Asset Base

As of August 31, 2018



Primary Investment Practice

As of April 30, 2017



Member Job Functions

As of August 31, 2018



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</i> SOLD OUT	Gold <i>1 available</i> SOLD OUT	Silver <i>5 available</i> SOLD OUT	Bronze <i>7 available</i>	Business <i>9 of 10 available</i>
	\$15,000	\$10,000	\$7,500	\$5,000	\$2,500
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"/>
Tabletop Exhibit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Listing on all printed materials at Conference	<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"/>	
Podium recognition	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Recognition as Featured Sponsor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Recognition as Lead Sponsor	<input checked="" type="checkbox"/>				
Conference registrations	10	8	6	4	2
Program advertisement	Full page	1/2 page	1/2 page	-	-
Panel speaker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Showcase intellectual capital (15 min)-	<input checked="" type="checkbox"/>				

SPONSORSHIP REGISTRATION & PAYMENT FORM

Register to be a Sponsor by faxing completed forms to 213.613.1233 and mailing payments to 520 South Grand Avenue, Suite 655, Los Angeles, CA 90071, **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 Registrants

Email Addresses

_____	_____
_____	_____
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Conference Registrant names must be submitted by **May 17, 2019**.

By listing an email address you are agreeing to give CFALA permission to release the above names and email addresses to the speakers, if requested.

SPONSOR LEVEL

- PLATINUM \$15,000
- GOLD \$10,000
- SILVER \$7,500
- BRONZE \$5,000
- BUSINESS \$2,500

- 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

Account Number _____
(for fax payment only)

Name on Account _____

Expiration Date _____

Signature _____

FOR SPONSORSHIP INQUIRIES, contact Laura Carney at 213.613.1503, x701, or laura@cfala.org. Sponsorship registration, company logos and specifications must be received by the CFALA Office by **Monday, April 15, 2019**.

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.