



# PORTFOLIO

**The West Coast's Premier Investment Conference**

JW Marriott Hotel at L.A. Live, Los Angeles, CA

May 19, 2022



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## SPONSORSHIP OPPORTUNITIES

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### JW MARRIOTT AT L.A. LIVE

900 W. Olympic Blvd., Los Angeles, CA 90015

7:00 am . . . . . Continental Breakfast & Registration **Tentative**  
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

### 2022 CONFERENCE SPEAKERS

**James Carville**, *Political Consultant*

**John Heilemann**, *Journalist & National Affairs Analyst*, NBC News and MSNBC

**Roger Ibbotson**, *Chairman*, Zebra Capital Management LLC

**Jane Wells**, CNBC

... and more.

For a complete list, visit [www.portfolioconference.com](http://www.portfolioconference.com)

### 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

**18%** . . . Female

**82%** . . . Male

**47** . . . . . Average age

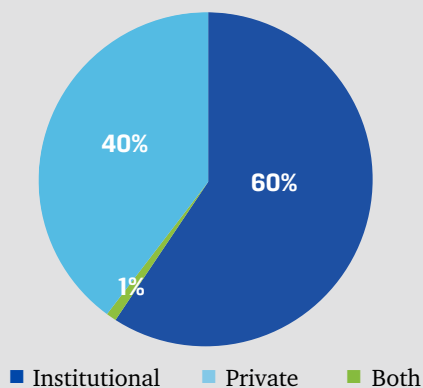
### Breakdown of 2019 Attendees

(approx. 500 total)

Fund Company	. . . . .28%
RIA	. . . . .23%
Wealth Manager	. . . . .14%
Service Provider	. . . . .10%
Institutional/Pension	. . .6%
Asset Manager	. . . . .5%
Consultant	. . . . .3%
CPA	. . . . .2%
Education	. . . . .2%
Government	. . . . .2%
Family Office	. . . . .1%
Multi-Family Office	. . .1%
Trade Association	. . . . .1%
Private Equity Firm	. . .1%
Venture Capital	. . . . .1%

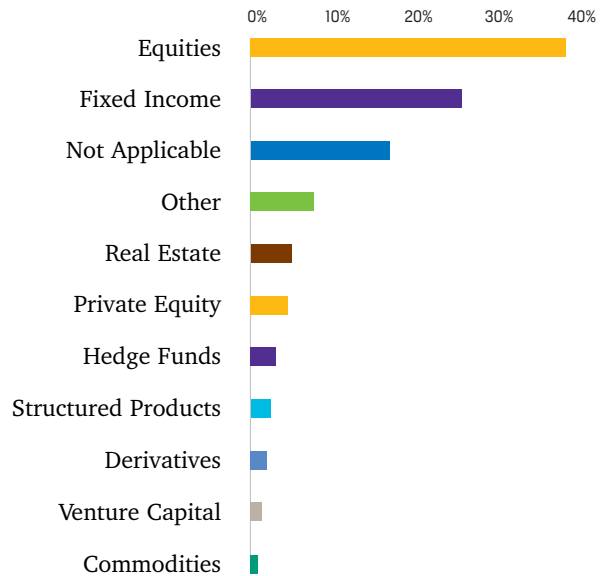
### CFALA Primary Asset Base

As of May 31, 2019 [last in-person Conference]



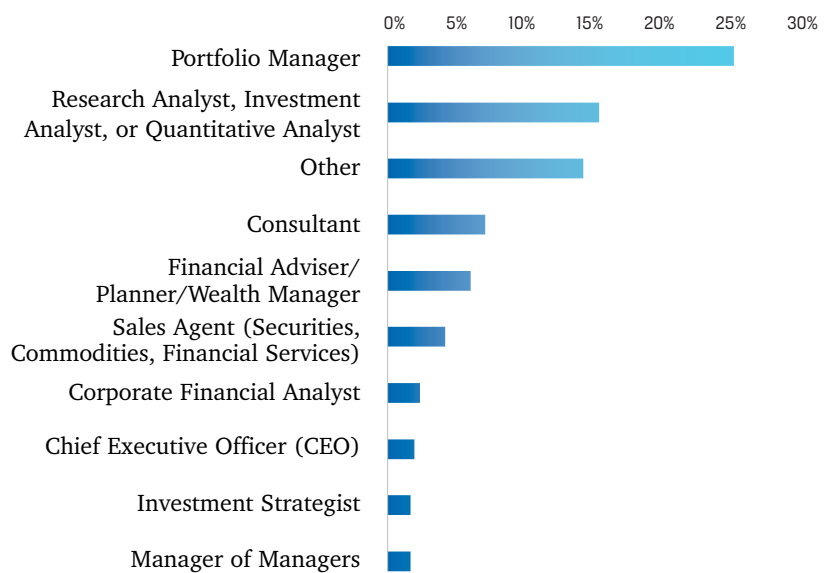
### CFALA Primary Investment Practice

As of May 31, 2019 [last in-person Conference]









































### CFALA Member Job Functions

As of May 31, 2019 [last in-person 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 <i>1 available SOLD OUT</i>	Gold <i>2 available</i>	Silver <i>5 available</i>	Bronze <i>6 of 7 available</i>	Business <i>5 of 10 available</i>
	\$25,000	\$15,000	\$10,000	\$6,000	\$4,000
Sponsor's name displayed on website and marketing					
Exhibit Space	10' x 10'	10' x 10'	10' x 10'	10' x 10'	6' Table
Company Listing on all printed materials at Conference					
"Opt-In" Attendee Information					
Sponsor's logo on Conference signage					
Panel Speaker					
Mobile App – Advertisement					-
Podium recognition					
Recognition as Featured Sponsor					
VIP Meet & Greet					
Recognition as Lead Sponsor					
Conference registrations	10	8	6	4	2
Mobile App – Ad Push Notification					-
Showcase intellectual capital (15 min)					
Reserved Table LUNCH					

# SPONSORSHIP REGISTRATION & PAYMENT FORM

**Register to be a Sponsor** by faxing completed forms to 213.613.1233 and mailing payments to 13400 Riverside Drive, Suite 215, Sherman Oaks, CA 91423, **OR register and pay online** at [www.cfala.org](http://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 **May 12, 2022**. 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](mailto:laura@cfala.org). Sponsorship registration, company logos and specifications must be received by the CFALA Office by **Thursday, April 21, 2022**.

Please email logos to [laura@cfala.org](mailto: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](mailto:laura@cfala.org)

Account Number \_\_\_\_\_  
(for fax payment only)

Name on Account \_\_\_\_\_

Expiration Date \_\_\_\_\_

Signature \_\_\_\_\_