



# Sponsorship Opportunities



The West Coast's Premier Investment Conference

The Omni Los Angeles at California Plaza  
September 25, 2024

## 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** 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, regulatory impact, emergent opportunities, geopolitical influences, and overviews in private markets and AI. Be sure to join your colleagues at our annual event, which is on its way to becoming the premier summit for enhancing the breadth and depth of knowledge of Southern California's investment professionals.



**Invitation only CFA Society member reception** on September 24th. Come meet charterholders and society members from southern California and across the U.S.

**CFALA  
Member  
Profile**

**19%**

Female

**81%**

Male

**95%**

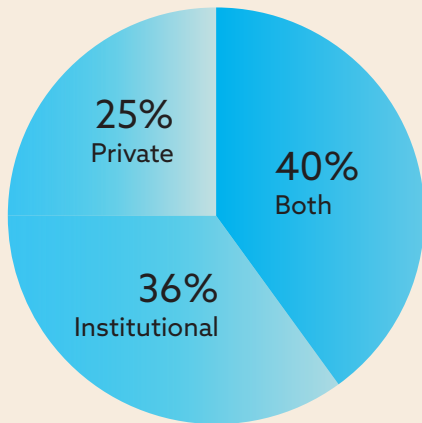
CFA Charterholders

**46**

Average age

**PORTFOLIO Attendee Asset Base**

[2023 PORTFOLIO Conference]



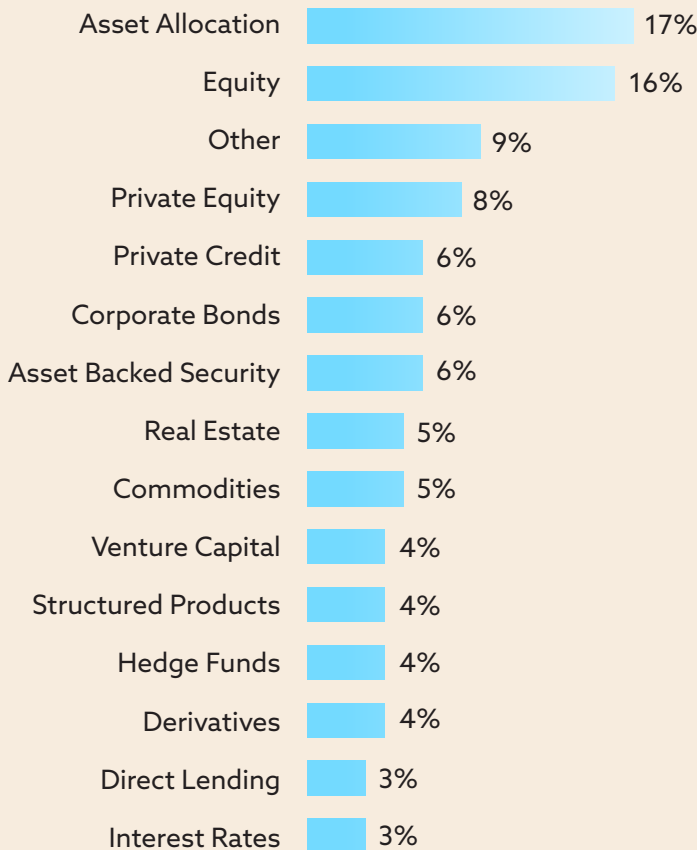
**CFALA Member Job Functions**

[as of September 1, 2023]

Portfolio Manager	21%
Research, Investment, Credit, or Quantitative Analyst	20%
Other	9%
Financial Adviser/Planner/Wealth Manager	8%
C- Suite (CEO, CIO, CFO)	8%
Consultant/Institutional Investment Consultant/Strategy Consulting	6%
Client Service or Relationship Management	4%
Corporate Financial Analyst	4%
Investment Strategist	3%
Sales Agent (Securities, Commodities, Financial Services, Institutional)	3%

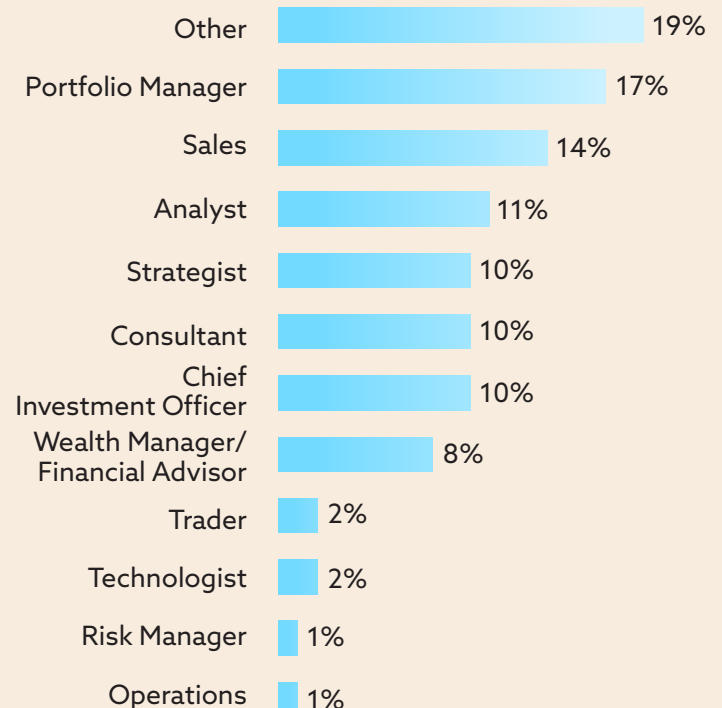
**PORTFOLIO Attendee Primary Investment Practice**

[2023 PORTFOLIO Conference]



**PORTFOLIO Attendee Job Functions**

[2023 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 4 available	Silver 5 available	Bronze 7 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
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	●				
Recognition as Wednesday evening Reception Sponsor		●			
Showcase intellectual capital (15 min)	●				
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](mailto: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](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 **September 8, 2024**. 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

**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](mailto:laura@cfala.org)

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 Wednesday, **August 14, 2024**.

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.