



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%

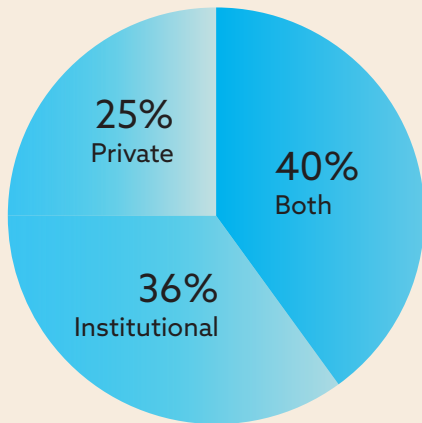
CFA Charterholders

46

Average age

PORTFOLIO Attendee Asset Base

[2023 PORTFOLIO Conference]



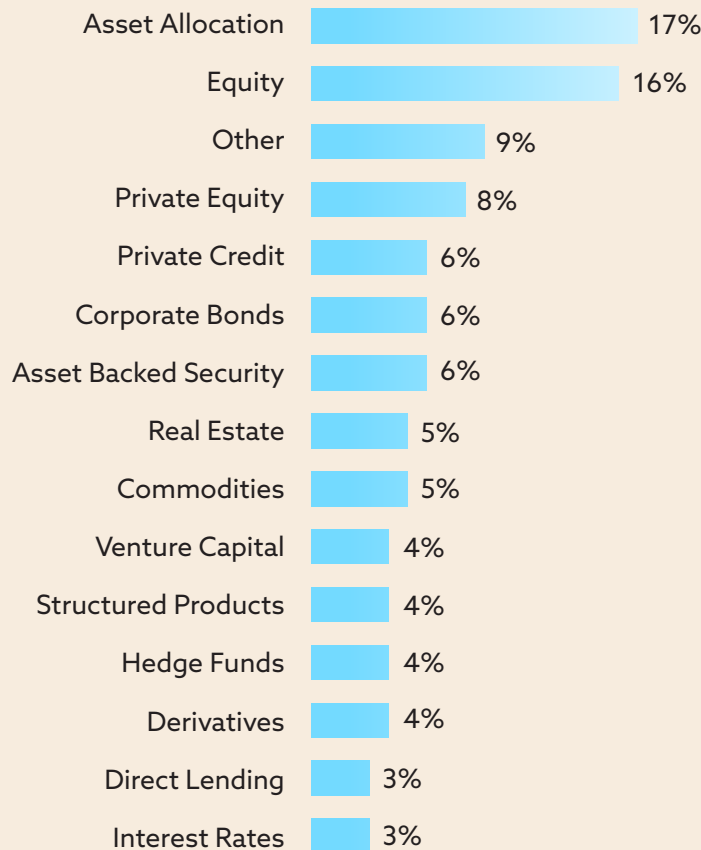
CFALA Member Job Functions

[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%

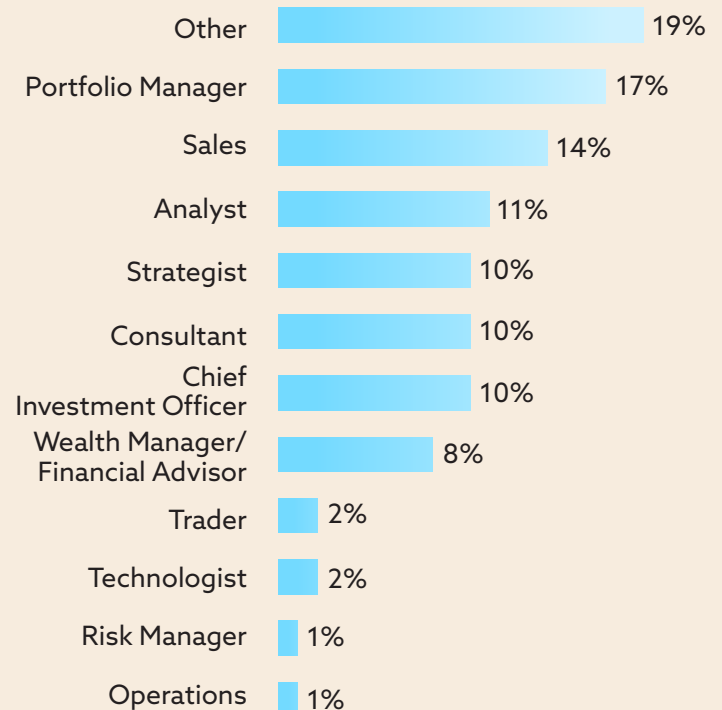
PORTFOLIO Attendee Primary Investment Practice

[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	<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
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"/>
"Opt-In" Attendee Information	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
https://www.thetacoguycatering.com/reviews/	<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 (Twitter, Facebook, 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"/>			
Recognition as Lead Sponsor	<input checked="" type="checkbox"/>				
Recognition as Wednesday evening Reception Sponsor		<input checked="" type="checkbox"/>			
Showcase intellectual capital (15 min)	<input checked="" type="checkbox"/>				
Reserved Table LUNCH	<input checked="" type="checkbox"/>				
GOBO Logo - outside water feature	<input checked="" type="checkbox"/>				

