

KEY BENEFITS

- Visibility to the CFASF community of top investment industry professionals in Northern California
- Firm logo included in CFASF's website, event page, signage, and more!
- Potential to provide speaker(s)/ moderator for panels
- Acknowledgment through social media
- Excellent networking opportunities
- Exposure to our subscriber list of over 12,000 industry professionals

ATTENDEES INCLUDE

CFA Society San Francisco (CFASF) is a vital part of the Bay Area investment community, with more than 3,400 members spanning the breadth of our industry including many in Wealth Management. Sponsoring CFASF events brings brand awareness for your company to a specialized, target audience of elite wealth management professionals.

- 65+ expected attendees at each event
- Over 70% of attendees are CFASF members
- Attendee titles include:
 - CIOs and Principals of RIA Firms
 - Portfolio Managers
 - Analysts
 - Family Office Practitioners
 - Financial Planners
 - Pension & Endowment Advisors

SPONSORSHIP OPPORTUNITIES

CFA Society San Francisco is pleased to announce that we are continuing our Wealth Management Series for a fourth year. This year we focus on the industry's future with sessions addressing the top concerns and areas of interest among leading Northern California firms. We will have 6 forums covering a wide range of topics important to practitioners and an invitational event for C-Suite executives and RIA owners.

SERIES FORUMS

Thursday, February 8, 2018

Exploring Opportunities & Risks in the Real Estate Sector

Thursday, April 5, 2018

ESG 360

Thursday, June 14, 2018

Behavioral Finance

Thursday, September 6, 2018

Wealth Management & FinTech South Bay Summit

(Half-Day Conference)

Thursday, October 4, 2018

Wealth Transfer to NextGen Clients

Thursday, November 8, 2018

Cross Border Planning & Investing Implications for Expats & Non-US Citizens

Series forums run from 3:30pm-6:30pm

Invitation-only C-Suite Gathering:

Thursday, May 24, 2018

SPONSORSHIP OPPORTUNITIES

Series Forum Sponsor	\$3,000
C-Suite Gathering Sponsor	\$8,000

2017 SERIES SPONSORS



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2018 WEALTH MANAGEMENT SERIES

SPONSORSHIP AGREEMENT

SPONSOR LEVELS	2018 RATES	SPONSOR OPTIONS
Series Forum Sponsor	\$3,000	
C-Suite Gathering Sponsor	\$8,000	

Organization Name: _____
(as it should appear on sponsored materials)

Mailing Address: _____

Primary Contact Name: _____

Primary Contact Phone: _____

Primary Contact Email: _____

Organization Website: _____

Authorized Signature: _____

Date

By signing this agreement, we hereby agree to become a CFA Society San Francisco Annual Sponsor for the aforementioned events. We also agree to provide our Logo in a clear digital format (.eps, .AI, or other high resolution image) within a timely manner of signing this agreement.

Payment Instructions:

Sponsorship invoice will be sent once the signed agreement is received and payments via check are preferred. Payment due dates may be flexible to accommodate fiscal year and budget cycles. Contact Tracy@cfa-sf.org for more information about accommodating special payment requests.



Please remit this agreement and your payment to:

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