



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
- Up to 4 complimentary tickets for the conference.

ATTENDEES

INCLUDE

CFA Society San Francisco (CFASF) is a vital part of the Bay Area investment community, with over 3,500 members spanning the breadth of our industry. Sponsoring CFASF events brings brand awareness for your firm to a specialized, target audience of elite investment professionals.

- 150-200 expected attendees at the conference
- Attendees include leading:
 - Leading Endowment Advisors & Consultants
 - Financial Executives of Foundations & Endowments
 - Board Members of Foundations
 - Investment Consultants, Advisors & Analysts
 - Money Managers
 - Managing Directors
 - C-Suite Executives
 - Asset Managers
 - CFASF Members
 - Governance Experts and More

SPONSORSHIP OPPORTUNITIES

CFA Society San Francisco is inaugurating a new day-long event offering best practices, new ideas, and important issues for university endowments and private foundations ranging from investment strategy, governance, costs, and board participation.

The Conference will address topics such as:

- What's ahead for E&Fs
- Defining investment success
- Challenges of Being a Lon-Term Investor
- Effective Investment Strategies for small and Mid-Sized E&Fs
- A CIO roundtable discussion
- Aligning mission with investment practices
- To outsource or not the Chief Investment Officer
- The Changing Landscape of Hedge Funds and Alternatives
- Board service
- The true costs of managing foundation resources

There are only four available sponsorships for this conference, so take this opportunity to offer your firm maximum visibility for this high profile event through sponsorship.

SPONSOR RECOGNITION

PRE- EVENT	TITLE SPONSOR	PARTNER SPONSOR
Recognition in promotional emails and/or print ads		
Opportunity to suggest a speaker for consideration		
Digital recognition on event page		
ONSITE		
Up to 4 complimentary guest passes	SOLD OUT	\$8,000
Recognition in event collateral (event program & signage)		
POST- EVENT		
Digital recognition through social media as conference sponsor		

EVENT DETAILS

The City Club of San Francisco

155 Sansome Street
San Francisco, CA 94104

Wednesday, November 29th
8:00 AM - 4:00 PM





CFA Society
San Francisco

FOUNDATIONS & ENDOWMENTS CONFERENCE

SPONSORSHIP AGREEMENT

SPONSOR BENEFITS	TITLE SPONSOR	PARTNER SPONSOR
Recognition in promotional emails and/or print ads		
Opportunity to suggest a speaker for consideration		
Digital recognition on event page		
Up to 4 complimentary guest passes	SOLD OUT	\$8,000
Recognition in event collateral (event program & signage)		
Digital recognition through social media as conference sponsor		

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:**

CFA Society San Francisco
235 Montgomery Street, Suite 725
San Francisco, CA 94104
415-814-7905 www.cfa-sf.org