



**CFA Society
Portland**

THE CFA SOCIETY PORTLAND INVITES YOU
TO THE PREMIER INVESTMENT STRATEGY EVENT

SPONSORSHIP OPPORTUNITIES

Thirteenth Annual INVESTMENT STRATEGY DINNER



Featured Speaker

Howard Marks, CFA
Co-Chairman, Oaktree Capital
A Conversation with Howard Marks, CFA

JANUARY 10, 2019

Cocktail Hour 5:30 pm, Dinner & Speaker Presentation 6:30 pm

Kridel Grand Ballroom, Portland Art Museum



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Sponsorship Packages

PRESENTING - \$6,000

Sponsorship Level Filled

SPONSORSHIP AT THIS LEVEL INCLUDES:

- Recognition as Presenting Sponsor
- Opening remarks by representative of your choice
- One page insert in program (please provide to CFASP)
- Corporate logo recognition at your tables and at the registration table
- Corporate logo recognition via projection during cocktail hour and dinner
- Permission to distribute promotional materials at all tables
- One sponsor table at dinner (8 tickets) with preferred seating
- Additional tables may be purchased at Silver pricing



GOLD - \$3,000

SPONSORSHIP AT THIS LEVEL INCLUDES:

- Recognition as a Gold Sponsor
- Name recognition in opening remarks
- Corporate logo recognition at your tables and at the registration table
- Corporate logo recognition via projection during cocktail hour and dinner
- One sponsor table at dinner (8 tickets) with preferred seating
- Additional tables may be purchased at Silver pricing



SILVER - \$1,500

SPONSORSHIP AT THIS LEVEL INCLUDES:

- Name recognition at your table
- One sponsor table at dinner (8 tickets) with preferred seating



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CFA Society Portland

The CFA Society Portland's Annual Investment Strategy Dinner is the premier investment strategy event in Portland. This unique gathering provides expert opinions on the global economy, the financial markets and investment strategies for the coming year. A diverse group of investment and financial professionals in the Portland community come together for this event. Attendance will provide you with excellent networking opportunities and a dynamic, informative keynote presentation.

Our society is an association of local investment professionals. Consisting of portfolio managers, security analysts, investment advisors, and other financial professionals, we: promote ethical and professional standards within the investment industry; encourage professional development through the CFA Program and continuing education; facilitate the exchange of information and opinions among people within the local investment community and beyond; and work to further the public's understanding of the CFA designation and investment industry. As one of many CFA Institute member societies, our society connects members to a global network of investment professionals.

THE PORTLAND SOCIETY AND THE COMMUNITY

As an integral part of the local financial community, the CFA Society Portland (CFASP) is committed to helping the next generation of investment professionals. We support and develop local students with scholarships, hands-on investment practice and industry connections. The CFASP partners with Portland State University to allow MBA and senior-level finance students to manage the CFASP's investment portfolio, over \$400,000. In addition, many society members volunteer their time serving on the boards of pension funds, endowments, charitable organizations and corporations to help them meet their fiduciary obligations to retirees and beneficiaries. Your support of the CFASP and the Thirteenth Annual Investment Strategy Dinner helps us to better serve our community.

CFA SOCIETY PORTLAND BOARD OF DIRECTORS 2018-2019

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Lisa Massena, CFA

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Thirteenth Annual INVESTMENT STRATEGY DINNER

SPONSORSHIP REGISTRATION & PAYMENT FORM

WANT TO BE A SPONSOR? PLEASE EMAIL ANDY HOYT, PUBLIC AWARENESS CHAIR, AT INFO@CFAPORTLAND.ORG WITH THE INFORMATION SHOWN IN THE FORM BELOW.

Please print or type.

Company (as you would like it announced or printed) _____

Principal Contact Person _____

Address _____

City, State, Zip _____

Telephone, Fax _____

Email Address _____

Sponsorship Level		Quantity	Total
Presenting	\$6,000	Sponsorship Level Filled	
Gold	\$3,000	_____	_____
Silver	\$1,500	_____	_____

Individual Tickets (Individual tickets can also be purchased at www.cfaportland.org)

Member	\$100	_____	_____
Non-Member	\$125	_____	_____

Total Payment Amount: \$ _____

Please send check or money order to:

CFA Society Portland (CFASP)

Post Office Box 1388

Portland, OR 97207

All sponsors will be contacted upon receipt of payment with a request for a guest list, as well as a current logo to be used as per the sponsorship agreement. The deadline for lists and logos is January 16, 2018. Info can be sent in advance to Andy Hoyt at info@cfaportland.org.

