



## ACADEMIC OPPORTUNITIES

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CFA Society Seattle  
16<sup>th</sup> Annual Economic Forecast Dinner

Thursday, January 17, 2019



CFA Society  
Seattle

# CFA Society Seattle

## 16<sup>th</sup> Annual Economic Forecast Dinner

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### About CFA Society Seattle

Created in 1974, CFA Society Seattle is dedicated to advancing our members' investment knowledge and careers by providing educational and networking opportunities, while promoting the CFA charter and investment ethics in the Puget Sound region. CFA Society Seattle has over 1,000 members representing all major institutional investment firms and a large cross section of private wealth management in the Puget Sound region. Our annual Economic Forecast Dinner is the Society's premier event, attracting over 400 attendees from our membership and interested investment professionals throughout Washington.

### SHERATON SEATTLE HOTEL

1400 6th Avenue | Seattle, WA 98101

4:30 pm	Networking Reception
6:00 pm	Dinner
6:15 pm	Evening Program

### KEY BENEFITS

- Maximum exposure at CFA Society Seattle's premier annual event.
- Target your primary audience.
- Generate new leads and prospects to grow your business.
- Network with current clients to enhance your relationships.
- Enhance credibility with a respected organization.
- Build market presence and brand awareness.

### CFA SOCIETY SEATTLE MEMBERSHIP PROFILE

Members	1,056
Female	19.6%
Male	80.4%
Average Age	44 yrs
Average Years in Industry	20+ yrs
Portfolio Managers	30%
Research Analyst	12%
Financial Advisor	10%
Chief-Level Executive	9%
Member works for firms w/ \$1 to \$5 billion AUM	15.6%
Member works for firms w/ \$50 to \$250 billion AUM	12.5%
Member works for firms w/ >250 billion AUM	12%

### OUR SPEAKERS

The Seattle Forecast Dinner annually hosts prominent practitioners from the fields of finance, publishing, and politics each of whom are recognized for their insight, accomplishments, and ongoing commitment to advancing integrity and expertise in the investment profession.

We are currently finalizing our 2019 speaker line-up and will be making an announcement very soon!



TOP RIGHT: Amity Shlaes (2017); Howard Marks, CFA (2015); Barry Ritholtz (2015); and Nili Gilbert; CFA (2018)

# SPONSORSHIP OPPORTUNITIES

CATEGORIES	PLATINUM (limit 2)	GOLD (limit 5)	SILVER (limit 5)	BRONZE (limit 8)
	\$15,000 ea.	\$7,500 ea.	\$5,000 ea.	\$3,500 ea.
<b>P R E – E V E N T P R O M O T I O N</b>				
Logo on CFA Society Seattle website	●	●	●	●
Logo in email blasts	●	●	●	
Custom recognition (to be determined)	●			
<b>E V E N T R E C O G N I T I O N</b>				
Logo on signage at registration	●	●	●	●
Recognition on screens during pre-event program presentation	●	●	●	●
Speaker introduction(s)	●			
Acknowledgment in opening remarks	●	●		
Event program Unless otherwise noted, company logo will be placed in event program based upon first come, first serve receipt. Ad copy and payment must be <u>RECEIVED</u> by 1.3.2019 at 12 noon in electronic file (JPG or PNG only). CFA Society Seattle will <u>NOT</u> design ad copy and/or scan ad copy or business cards. Email ad copy: <a href="mailto:amber.mw.fowler@gmail.com">amber.mw.fowler@gmail.com</a>	●	●	●	●
<b>E V E N T A M E N I T I E S</b>				
Tables of 8 (eight) at event Up to two (2) additional tables may be purchased for \$1,250 each but must be <u>paid</u> for no later than November 9, 2018.	● ● Two (2) tables	● One (1) table	● One (1) table	● (One (1) table)
Opportunity to provide one (1) branded item to all attendees	●	●		
Company logo or name on guest table	●	●	●	●
<b>P O S T – E V E N T P R O M O T I O N</b>				
Acknowledgement in press release after the event	●	●	●	●
Logo in 2019 Spring newsletter	●	●	●	●
Logo on CFA Society Seattle website for one month after event	●	●	●	●
Logo in CFA Society Seattle post-event email blast after event	●	●	●	●
2020 Forecast Dinner first right of refusal price subject to change; deadline to commit is 8.1.19	●			

## FOR MORE INFORMATION CONTACT

Amber Fowler | [amber.mw.fowler@gmail.com](mailto:amber.mw.fowler@gmail.com) | 206.999.8388



**CFA Society  
Seattle**

# CFA SOCIETY SEATTLE 16<sup>th</sup> ANNUAL FORECAST DINNER SPONSORSHIP REGISTRATION & PAYMENT FORM

## SPONSORSHIPS

<input type="checkbox"/> \$15,000	Platinum
<input type="checkbox"/> \$7,500	Gold
<input type="checkbox"/> \$5,000	Silver
<input type="checkbox"/> \$3,500	Bronze

## P A Y M E N T

Invoice Requested  
 Check Included (Preferred)

Contact Pam Cahill, Operations Director  
at [operations@cfaseattle.org](mailto:operations@cfaseattle.org) or  
360.620.0790 to complete payment by  
credit card.

## ACADEMIC TABLES

<input type="checkbox"/> \$1,250.00	TABLE (8 seats)
<input type="checkbox"/> \$2,000.00	TABLE (8 seats)

*Purchased on or after Friday, November 2, 2018*

- Due to the overwhelming popularity of the event, only a limited number of “non-medal” tables are available.
- Tables will be assigned in the order paid reservation is received.
- The only way to arrange for eight (8) individual seats together is through a Medal (Platinum, Gold, Silver, Bronze) sponsorship opportunity or table purchase.
- Medal Sponsor: If you need to purchase an additional table of eight (8) outside of the Event Amenities as noted on page 3, please contact Pam Cahill at 360-620-0790 or [operations@cfaseattle.org](mailto:operations@cfaseattle.org) to arrange.

## INDIVIDUAL TICKETS

### Early Bird Registration

*(Individual ticket purchasers are not guaranteed to be seated together.)*

**Purchased on or before Thursday, November 1, 2018**

\$125 | CFA Member | *must be a current & paid member*  
 \$175 | Non-CFA Member

**Purchased on or after Friday, November 2, 2018**

\$150 | CFA Member | *must be a current & paid member*  
 \$200 | Non-CFA Member

## REMITTANCE

*We hereby agree to become a sponsor to the 16<sup>th</sup> Annual CFA Society Seattle Economic Forecast Dinner at the level and fee as shown, and agree to the terms and conditions outlined.*

Primary Sponsor Contact Name

Organization Name (as you wish it to appear on sponsorship publicity)

Mailing Address

Primary Contact Phone

Primary Contact Fax

Primary Contact Email Address

Organization Website

Authorized Signature (if authorized party is different than primary contact, please print and sign name)

Date

**We are unable to reserve underwriting opportunities. | Payment must be included to secure and finalize purchase(s). All fees are nonrefundable once paid.**