



CFA Society
Hartford



2018 Annual Forecast Dinner

Connecticut Convention Center
Tuesday, February 6, 2018
5:00 PM - 9:00 PM

Sponsorship Opportunities



Event Overview

“Investing in 2018 and Beyond: A Guide to the Markets”

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Please join the CFA Society Hartford as we celebrate our 2018 Annual Forecast Dinner on Tuesday, February 6, 2018. This is the Society's premier networking event of the year, bringing together over 400 of the Hartford area's leading investment and financial professionals as well as key decision makers in other local organizations. Sponsorship Opportunities provide firm exposure at the Annual Forecast Dinner and on the Society website as well as networking opportunities to engage our members and guests throughout the year at periodic luncheons and conferences hosted by the Society.

Sponsorship levels start at \$1,000 for our Non-Profit sponsorships and continue to a Diamond Sponsorship at \$10,000.

AGENDA

5:00 PM

Networking / Social Hour
Exhibitors

6:15 PM

Dinner

Keynote Speaker

Dr. David Kelly, CFA
Managing Director Chief Global
Strategist
J.P. Morgan Asset Management

“Investing in 2018 and Beyond: A Guide to the Markets”

In 2018, the U.S. economy should enter the 10th year of a long economic expansion. While the expansion has been slow, it has allowed for substantial gains in financial assets. In the year ahead, we expect somewhat higher inflation and a continued improvement in the global economy, in addition to some monetary tightening and fiscal stimulus. But what does this mean for investing? In this presentation, Dr. David Kelly will explore the U.S. and global investment environment, and consider how to position portfolios given investment fundamentals, potential risks and current valuations.



Keynote Speaker

Dr. David Kelly, CFA
Managing Director Chief Global Strategist
J.P. Morgan Asset Management

Dr. David Kelly is the Chief Global Strategist and Head of the Global Market Insights Strategy Team for J.P. Morgan Asset Management. With over 20 years of experience, David provides valuable insight and perspective on the economy and markets to the institutional investor and financial advisor global communities. David's research focuses on investment implications of an evolving economic environment. He has written extensively on all aspects of the U.S. economy and his proprietary U.S. economic forecasting model helps shape his views on both the economic landscape and prospective asset class returns. He currently sits on JP Morgan Fund's operating committee. Throughout his career, David has developed a unique ability to explain complex economic and market issues in a language that financial professionals can use to communicate to their clients. He is a keynote speaker at many national investment conferences and a frequent guest on CNBC, Bloomberg, and other financial media outlets. Prior to joining J.P. Morgan Asset Management, David served as Economic Advisor to Putnam Investments. He has also served as a senior strategist/economist at SPP Investment Management, Primark Decision Economics, Lehman Brothers and DRI/McGraw-Hill. David is a CFA® charterholder. He also has a Ph.D and M.A. in Economics from Michigan State University and a B.A. in Economics from University College Dublin in the Republic of Ireland.

About CFA Society Hartford

CFA Society Hartford is one of the leading associations of local investment professionals in Connecticut, steeped in rich history spanning over 60 years. The non-profit organization has been serving Connecticut since 1953.

Top employers of CFA Society Hartford Members

The Society's membership is well represented in all the leading financial institutions in the area: Babson Capital, CIGNA, Conning Asset Management, Fiduciary Investment Advisors, HIMCO, Prudential, Virtus Investment Partners, VOYA, Webster Bank and more.

Sponsorship Contact

To secure sponsorship opportunities and gain access to investment professionals attending the 2018 Annual Forecast Dinner, please contact:

Ric Filippelli, CFA
Forecast Dinner Chair and Vice President Advocacy & Membership
Forecast@HartfordCFA.org

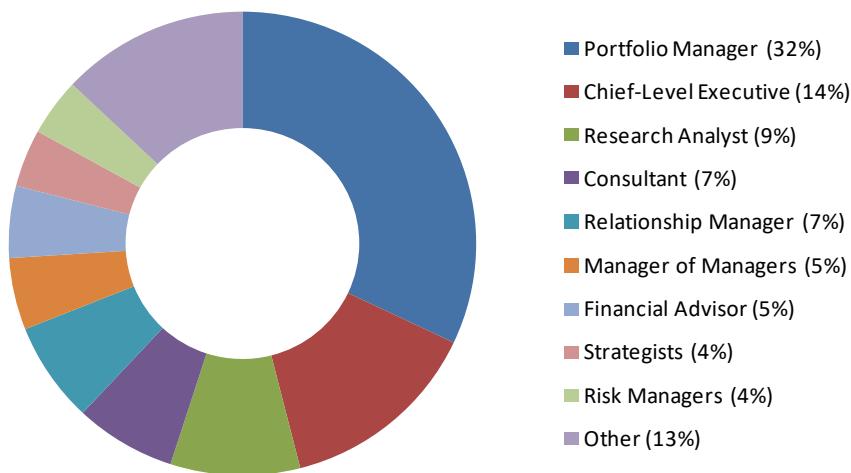
or Rebecca Taylor
administrator@hartfordcfa.org
(860) 604-1411

Dinner Attendee Demographics

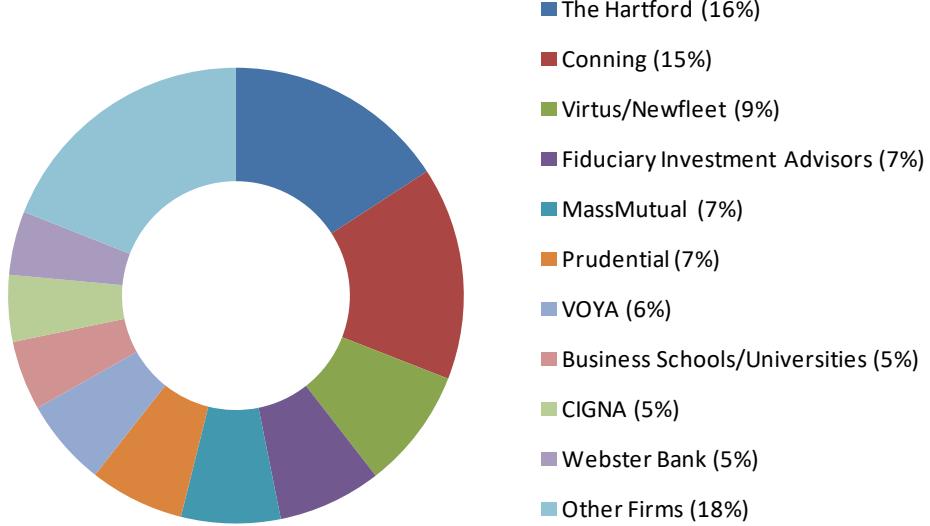
The attendee profile reflects aggregate data from the past five CFA Society Hartford Annual Dinners.

406 | Average Investment Professional Attendees

Attendee Occupation



Top Firms Represented



Forecast Dinner Sponsorship Opportunities

All benefits are dependent on the Sponsor providing the required materials and information prior to deadlines.

	Diamond \$10,000	Platinum \$7,500	Gold \$5,000	Silver \$3,500	Bronze \$2,000	Non-Profit \$1,000
Number of Sponsorships available at each level	1	1	5	5	5	7
Pre-Event Benefits						
Corporate name printed as a sponsor in Formal Invitation mailed to over 1,000 members and past attendees	●	●				
Listing as sponsor in Annual Meeting eblasts/digital invitations	Logo	Logo	Logo	Logo	Business Name	Organization Name
Event Benefits						
Annual Dinner Guest Tickets (10 guests per table) Additional tables can be purchased for \$1,100/each	3 Tables	2 Tables	2 Tables	1 Table	1 Table	2 tickets
Prime table placement of corporate sponsored tables at Annual Dinner	In Front, Center	In Front	Towards Front Center	Towards Center		
Prominent Display of logo on tables as an event sponsor	●	●	●	●	●	●
Full Color Advertisement in the Program Booklet	Full Page Inside Cover	Full Page Back Inside Cover	1/2 Page	1/4 Page	1/8 Page	
Firm name, description, and logo listed in Annual Dinner Program	●	●	●	●	●	●
Company logo on name badges of all attendees	●	●				
Firm logo as a sponsor on signage at Annual Dinner Attendee Registration	●	●	●	●	●	●
Firm name/logo as a sponsor on signage at Social Hour	●	●				
Exhibitor Table/Booth (8'x30") in Social Hour/Reception area	●	●	●	●	●	●
Firm Logo Display: projection screens will display logo image as a sponsor multiple times during program	Logo & Company Description	Logo & Company Description	Logo & Company Description	Logo & Company Description	Logo Only	Logo Only
Special Recognition as a sponsor during President's Opening Remarks	Plaque	Plaque	By Name	By Name	General	General
Post-Event Benefits						
List of attendees including Name, Company and Job Title	●	●	●			
Priority Speaker at CFA Society Hartford Education Luncheon(s) including one Investment Conference*	●	●	●			
Listing as sponsor in Society's Post-Event Newsletter and One Year listing on CFA Website with organization/ Business Description.	Logo & Company Description	Logo & Company Description	Logo & Company Description	Logo & Company Description	Logo & Company Description	Logo & Company Description

*Based on request from Sponsor and Sponsor's business alignment with program topic

Forecast Dinner Event Registration

Purchase Options		Before January 19th	After January 19th
Table of 10	Members & Non-Members	\$1,100	\$1,300
Individual Seats	CFA Society Hartford Member	\$90	\$110
	Non-Member	\$135	\$145

Forecast Dinner Program Advertising Opportunities

The CFA Society Hartford Forecast Dinner program is a great place to get the word out about your company. With more than 500 printed, our program advertisements reach hundreds of leading investment and financial professionals.

We offer many advertising options to fit every budget and every need. Select from three size options.

With the Half Page & Full Page advertisements, add a ticket to the Forecast Dinner for an additional \$50.

FORECAST DINNER CFA Society Hartford

January 26, 2017



2018 Rates

Full Color Advertisements

1/8" Page, 1.25" x 2.5"
\$140.00

Quarter Page, 1.75" High x 5" Wide or 5" x 1.75" Wide
\$150.00

Half Page, 3.75" High x 5" Wide
\$250.00
\$300.00*

Full Page, 7-1/2" High x 5" Wide
\$450.00
\$500.00*

**Includes one (1) Admission to Forecast Dinner*