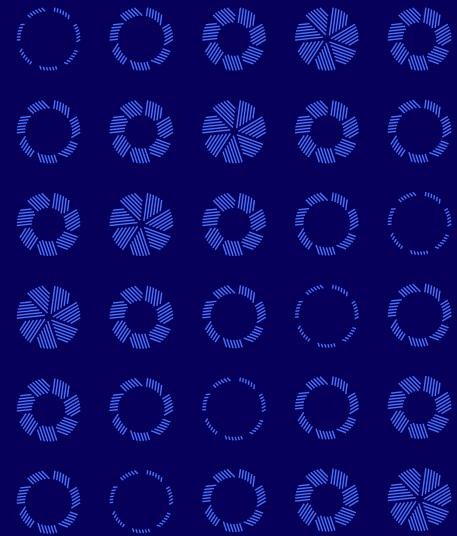




# 2026 Annual Dinner

April 23 • 5-9 PM • Vibrant Music Hall, Waukee



## It's Our "Can't Miss" Event of the Year!

**Expand your network and elevate your expertise** at CFA Society Iowa's premier event of the year!

**Join Iowa's most influential investors and financial professionals** to **share insights, explore client opportunities** — and **learn potentially life-changing AI tips** from a leading industry expert!

## Our Keynote Speaker

**Former Google executive Steve Lerch** will deliver a captivating keynote on the **practical usage of generative AI tools** like ChatGPT, Gemini, and Copilot.



He'll cut through the jargon and use real-world examples to show you how AI can revolutionize your work as well as your personal life.

Key takeaways will include:

- » Discover how AI can simplify your complex tasks, generate creative content, and even provide personalized coaching.
- » Learn how AI-powered tools, from chatbots to image generators, can be used to spark your imagination.
- » Gain a competitive edge by leveraging AI to streamline your work, improve your decision-making, and deliver exceptional results.



## High-Impact ROI Opportunities for Sponsors

- » Generate new leads and prospects
- » Strengthen relationships with current clients
- » Build market presence and brand awareness
- » Show support for the CFA designation and the Society



## About Our Members

**Most commonly held positions:**

- » Portfolio Manager
- » Analyst
- » Investment Advisor
- » Chief Investment Officer
- » Private Wealth Manager

**Top employers:**

- » Principal Financial Group / Principal Asset Management
- » Aegon Asset Management
- » FBL Financial Group
- » Security Benefit
- » Federal Home Loan Bank

# Table Sponsorship Levels & Benefits

	<b>Title \$10,000</b>	<b>Platinum \$8,000</b>	<b>Gold \$6,000</b>	<b>Silver \$4,000</b>	<b>Bronze \$2,000</b>
<b>NUMBER AVAILABLE</b>	1	1	UNLIMITED UNTIL TABLES ARE SOLD OUT	UNLIMITED UNTIL TABLES ARE SOLD OUT	UNLIMITED UNTIL TABLES ARE SOLD OUT
<b>TABLE PLACEMENT</b>	FRONT	FRONT	NEAR FRONT	GENERAL	GENERAL
One table (six seats) with firm logo displayed on table*	●	●	●	●	●
<b>Recognition via CFA Society Iowa's website, social media, newsletter (circulation 2,400+), and slideshow during dinner (before keynote)</b>	●	●	●	●	●
List of attendee names and employers (opt-in basis) provided upon request	●	●	●	●	-
<b>Four tickets to a CFA Society Iowa 2026 Annual Golf Outing</b>	●	●	●	-	-
Recognition by name during opening remarks	●	●	-	-	-
<b>Logo on cocktail napkins</b>	-	●	-	-	-
Logo on a gift given to attendees	●	-	-	-	-
<b>Opportunity to appear on-stage during opening remarks</b>	●	-	-	-	-
Right of first refusal for 2027 Annual Dinner Title Sponsorship	●	-	-	-	-

\*Sponsors may purchase additional tables at a discounted rate as availability allows.

## Non-Table Sponsorships & Benefits

Firms purchasing non-table sponsorships will be recognized via CFA Society Iowa's website, social media and newsletter, and in the slideshow during dinner. These sponsorships do not include a table at the event.

**Technology  
\$3,000**

**Transportation\*\*  
\$2,000**

**Cocktail Reception  
\$1,000**

**Dessert  
\$1,000**

**Photography  
\$1,000**

\*\*Transportation sponsorship covers the costs of providing group transportation for attendees based in the Cedar Rapids and Iowa City areas.

# Past Annual Dinner Sponsors

*We appreciate your generous support!*

26North	Income Research + Management
Aegon Asset Management	Institutional Investment Group (IIG)
Alternatives by Franklin Templeton	Invesco
American Century Investments	Iowa State University Ivy College of Business
American Equity	J.P. Morgan Asset Management
American Funds	Kroll Bond Rating Agency
Ares Management	Lazard Asset Management
Barclays	Mairs & Power
Benefit Street Partners	McGill Junge Wealth Management
BlackRock	Milliman
Bloomberg	Modern Woodmen of America
Blue Owl Capital	Monarch Private Capital
Bral Niedert Private Wealth Advisors	Morgan Stanley
Brookfield	Natixis
Brown Brothers Harriman	NCP, Inc.
BTC Capital Management	Ninety One
Coaching Actuaries	Numerix
Cohen and Steers	Payden & Rygel Investment Management
D.M. Kelly & Co.	PIMCO
Drake University	Principal Asset Management
EMC Insurance	Rockwood Group
Enhanced Capital	S&P Dow Jones Indices
Farm Bureau Financial Services	Salt Solutions
FBL Financial Group, Inc.	State Street Global Advisors SPDR
Federated Hermes	Stone Harbor Investment Partners
FHLB Des Moines	T. Rowe Price
Fidelity & Guaranty Life	TD Ameritrade
Fiera Capital	Thomson Reuters
Franklin Templeton	TPG Capital
Gilbert & Cook Private Wealth Management	Transamerica
Goldman Sachs Asset Management	Van Eck Securities
Golub Capital	Vanguard
Guggenheim	Voya
Hamilton Lane	West Bank
HPS Investment Partners, LLC	

# 2026 Annual Dinner Sponsorship Agreement

## **SPONSORSHIP LEVEL**

We hereby agree to sponsor the CFA Society Iowa 2026 Annual Dinner at the level and payment amount indicated below.

### **TABLE SPONSORSHIP:**

**Title - \$10,000**

**Platinum - \$8,000**

**Gold - \$6,000**

**Silver - \$4,000**

**Bronze - \$2,000**

### **NON-TABLE SPONSORSHIP:**

**Technology - \$3,000**

**Transportation - \$2,000**

**Cocktail Reception - \$1,000**

**Dessert - \$1,000**

**Photography - \$1,000**

### **OTHER:**

Please specify amount and details:

## **PLANNED PAYMENT METHOD**

**Credit Card** - A 4% processing fee will apply. We will email you a link to pay online.

**Check** - Send check to: CFA Society Iowa, PO Box 93052, Des Moines, IA 50393

## **CONTACT INFORMATION**

---

*Primary Contact Person*

---

*Company*

---

*Email*

---

*Authorized Signature (typed is acceptable)*

---

*Date*

**Please send this agreement and a high-res logo to [IowaCFA@gmail.com](mailto:IowaCFA@gmail.com).**

Thank you for your sponsorship! We appreciate your generous support!