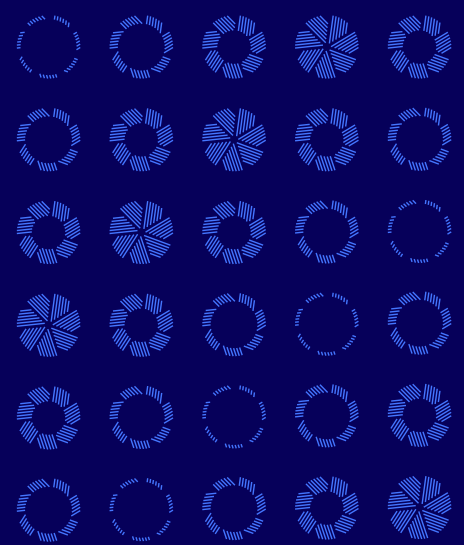


**CFA Society
Iowa**

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

	Title \$10,000	Platinum \$8,000	Gold \$6,000	Silver \$4,000	Bronze \$2,000
NUMBER AVAILABLE	1	1	UNLIMITED UNTIL TABLES ARE SOLD OUT	UNLIMITED UNTIL TABLES ARE SOLD OUT	UNLIMITED UNTIL TABLES ARE SOLD OUT
TABLE PLACEMENT	FRONT	FRONT	NEAR FRONT	GENERAL	GENERAL
One table (six seats) with firm logo displayed on table*	●	●	●	●	●
Recognition via CFA Society Iowa's website, social media, newsletter (circulation 2,400+), and slideshow during dinner (before keynote)	●	●	●	●	●
List of attendee names and employers (opt-in basis) provided upon request	●	●	●	●	-
Four tickets to a CFA Society Iowa 2026 Annual Golf Outing	●	●	●	-	-
Recognition by name during opening remarks	●	●	-	-	-
Logo on cocktail napkins	-	●	-	-	-
Logo on a gift given to attendees	●	-	-	-	-
Opportunity to appear on-stage during opening remarks	●	-	-	-	-
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
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**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
Aegon Asset Management
Alternatives by Franklin Templeton
American Century Investments
American Equity
American Funds
Ares Management
Barclays
Benefit Street Partners
BlackRock
Bloomberg
Blue Owl Capital
Bral Niedert Private Wealth Advisors
Brookfield
Brown Brothers Harriman
BTC Capital Management
Coaching Actuaries
Cohen and Steers
D.M. Kelly & Co.
Drake University
EMC Insurance
Enhanced Capital
Farm Bureau Financial Services
FBL Financial Group, Inc.
Federated Hermes
FHLB Des Moines
Fidelity & Guaranty Life
Fiera Capital
Franklin Templeton
Gilbert & Cook Private Wealth Management
Goldman Sachs Asset Management
Golub Capital
Guggenheim
Hamilton Lane
HPS Investment Partners, LLC

Income Research + Management
Institutional Investment Group (IIG)
Invesco
Iowa State University Ivy College of Business
J.P. Morgan Asset Management
Kroll Bond Rating Agency
Lazard Asset Management
Mairs & Power
McGill Junge Wealth Management
Milliman
Modern Woodmen of America
Monarch Private Capital
Morgan Stanley
Natixis
NCP, Inc.
Ninety One
Numerix
Payden & Rygel Investment Management
PIMCO
Principal Asset Management
Rockwood Group
S&P Dow Jones Indices
Salt Solutions
State Street Global Advisors SPDR
Stone Harbor Investment Partners
T. Rowe Price
TD Ameritrade
Thomson Reuters
TPG Capital
Transamerica
Van Eck Securities
Vanguard
Voya
West Bank

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.

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