



**CFA Society
Portland**

SPONSORSHIP OPPORTUNITIES

Presenting Sponsor

**FERGUSON
WELLMAN**

CELEBRATING **50** YEARS

Nineteenth Annual Investment Strategy Dinner



Featured Speaker

Gabriela D. Santos, Managing Director
Chief Market Strategist for the Americas on the Global Market
Insights Strategy Team at J.P. Morgan Asset Management

APRIL 30, 2026

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

Kridel Grand Ballroom, Portland Art Museum



Sponsorship Packages

Presenting Sponsor

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 table 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

**FERGUSON
WELLMAN**

CELEBRATING **50** YEARS

Platinum \$6,000

Sponsorship at this level includes:

- Recognition as Platinum Sponsor
- Name recognition in opening remarks
- Corporate recognition at your table 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
- Lunch for two representatives with keynote speaker
- Branded lanyard

Gold \$4,000

Sponsorship at this level includes:

- Recognition as a Gold Sponsor
- Name recognition in opening remarks
- Corporate logo recognition at your table 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 \$2,000

Sponsorship at this level includes:

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

Nonprofit Organizations \$1,000

Sponsorship at this level includes:

- Four tickets
- Table in lobby to showcase organization information





**CFA Society
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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 \$600,000. 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 Eighteenth Annual Investment Strategy Dinner helps us to better serve our community.

CFA SOCIETY PORTLAND BOARD OF DIRECTORS 2024-2025

President: Ila Gupta, CFA

Vice President/Treasurer: Joe Herrle, CFA

Secretary: Alex Canellopoulos, CFA

Public Awareness: Julie Bryan, CFA

Programs: Ryan Fitzgerald, CFA

Membership/Education: Rudy Murgo, CFA

Immediate Past President: Mike Gallagher, CFA

University Liaison: Piman Limpaphayom, CFA





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Nineteenth Annual Investment Strategy Dinner

SPONSORSHIP REGISTRATION & PAYMENT FORM

Want to be a sponsor? Please email Julie Bryan, CFA, Public Awareness Chair, at info@cfaportland.org with the information shown in the form below, or **register online [HERE](#)**.

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 \$7,000	<i>filled</i>	
Platinum \$6,000	_____	_____
Gold \$4,000	_____	_____
Silver \$2,000	_____	_____
Nonprofit \$1,000	_____	_____



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

Member \$125 _____

Non-Member \$200 _____

Total Payment Amount: \$ _____

Please send check or money order to:

CFA Society Portland (CFASP)
16697 NW Graf Street
Portland, OR 97229

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 March 31, 2026. Info can be sent in advance to Julie Bryan at info@cfaportland.org.