



**CFA Society  
Portland**

## SPONSORSHIP OPPORTUNITIES

Presenting Sponsor

**FERGUSON  
WELLMAN**

CELEBRATING **50** YEARS

# ***Eighteenth Annual Investment Strategy Dinner***



### ***Featured Speaker***

Bob Michele, Chief Investment Officer and Head of the Global Fixed Income, Currency & Commodities (GFICC) Group at J.P. Morgan Asset Management

**APRIL 10, 2025**

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

Kridel Grand Ballroom, Portland Art Museum



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# ***Sponsorship Packages***

## ***Presenting Sponsor***



**FERGUSON WELLMAN**  
CAPITAL MANAGEMENT

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

## ***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 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: Mike Gallagher, CFA  
Vice President/Treasurer: Ila Gupta, CFA  
Secretary: Rudy Murgo, CFA  
Public Awareness: Joe Herrle, CFA

Programs: Julie Bryan, CFA  
Membership/Education: Ryan Fitzgerald, CFA  
Immediate Past President: Tony Tursich, CFA  
University Liaison: Piman Limpaphayom, CFA





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# ***Eighteenth Annual Investment Strategy Dinner***

## SPONSORSHIP REGISTRATION & PAYMENT FORM

Want to be a sponsor? Please email Joe Herrle, CFA, Public Awareness Chair, at [info@cfaportland.org](mailto: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><b>filled</b></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](http://www.cfaportland.org))

Member            \$125            \_\_\_\_\_

Non-Member      \$200            \_\_\_\_\_

Total Payment Amount:                      \$ \_\_\_\_\_

Please send check or money order to:

CFA Society Portland (CFASP)  
3127 N.E. Tillamook Street  
Portland, OR 97212

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 17, 2025. Info can be sent in advance to Joe Herrle at [info@cfaportland.org](mailto:info@cfaportland.org).