CFA Society Portland

SPONSORSHIP OPPORTUNITIES

Presenting Sponsor

FERGUSON WELLMAN

CELEBRATING 50 YEARS

Twentieth Annual Investment Strategy Dinner





Featured Speaker

Jeffrey Sherman

DoubleLine's Deputy Chief Investment Officer

MARCH 3, 2027

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

Kridel Grand Ballroom, Portland Art Museum

CFA Society Portland

Sponsorship Packages

PRESENTING SPONSOR

FERGUSON WELLMAN

CELEBRATING 50 YEARS

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:

- Eight tickets
- Table in lobby to showcase organization information

EXCLUSIVE ACCESS TO THE ATTENDEE REGISTRATION LIST IS INCLUDED WITH ALL SPONSORSHIP LEVELS

CFA Society Portland

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 is well over $1,000,000. 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 Twentieth Annual Investment Strategy Dinner helps us to better serve our community.

CFA SOCIETY PORTLAND BOARD OF DIRECTORS 2025-2026

President: Joe Herrle, CFA
Vice President/Treasurer: Julie Bryan, CFA
Secretary: Mike Mueller, CFA
Public Awareness: Ryan Fitzgerald, CFA
Programs: Alex Canellopoulos, CFA/Rudy Murgo, CFA
Membership/Education: Mike Curry, CFA
Immediate Past President: Ila Gupta, CFA
University Liaison: Piman Limpaphayom, CFA



CFA Society Portland

Twentieth Annual Investment Strategy Dinner

SPONSORSHIP REGISTRATION & PAYMENT FORM

Want to be a sponsor? Please email Alex Canellopoulos, 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	FILLED	
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)
1540 SW 57th Avenue
Portland, OR 97221

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 February 19, 2027. Info can be sent in advance to Ryan Fitzgerald at info@cfaportland.org.