



CFA Society
Calgary



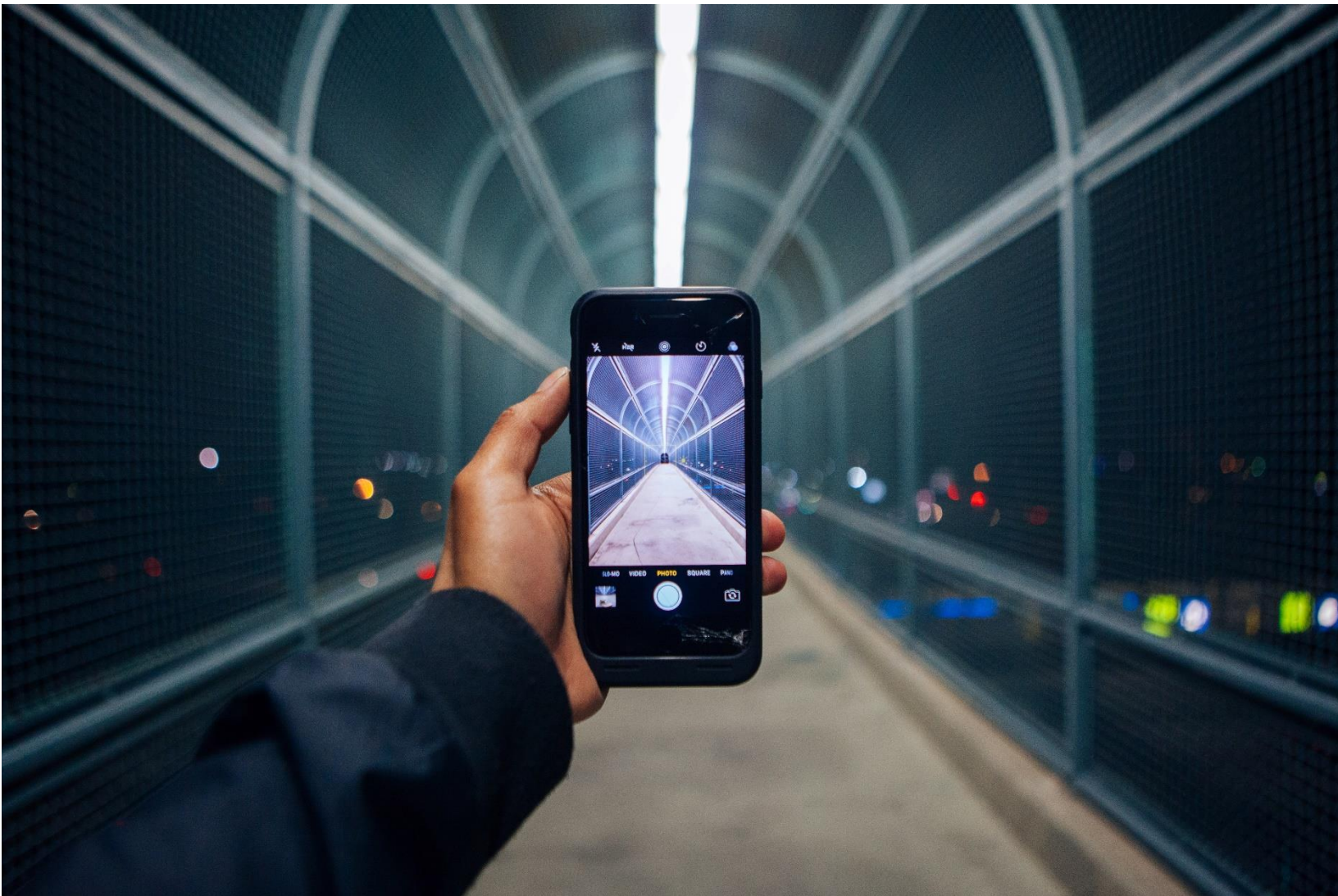
CFA Society
Edmonton



CFA Society
Winnipeg

2021

Annual Forecast Experience



January 21, 2021

Virtual Experience

Calgary, Edmonton, Winnipeg

THE CHANGING LANDSCAPE OF EVENTS

The Global Pandemic that started in March of 2020 has changed the way we work, meet, and live. CFA Societies in Canada are working hard to continue to deliver quality events, provide value to both our members and non-members and uphold the tradition of our Annual Forecast Dinners.

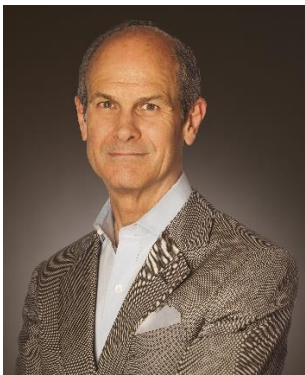
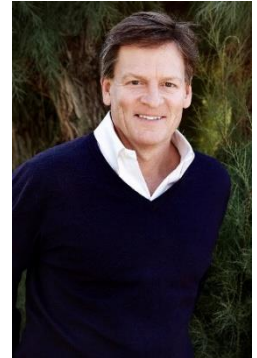
CFA Societies Calgary, Edmonton and Winnipeg are pleased to offer you the Annual Forecast Experience; a virtual event with the one and only Michael Lewis. This live discussion, moderated by Geoff Colvin, will be brought to you using a high-quality production platform and full production team. This is not your everyday Zoom call! Reach an audience of more than 2000 attendees from the finance and greater professional communities. Marketing efforts will expand across Canada, as attendees for this marquee event can enjoy the presentation from anywhere.

Michael Lewis

Best-Selling Author of *The Fifth Risk*, *Moneyball*, *The Blind Side*, and *The Big Short*

WHY MICHAEL LEWIS IS CAPTIVATING AUDIENCES

A sharp observer of politics, finance, and the evolution of American culture, Michael Lewis combines keen insight with his signature wit, making him one of today's leading social commentators. Lewis' program takes a fresh, hard look at the ever-changing value systems that drive our economic markets, political landscapes, and cultural norms, and how organizations can adapt their thought strategies to facilitate growth among all three.



Geoff Colvin

Senior Editor-at-Large, *Fortune* and Bestselling Author
Helping Leaders Confront Trends Driving Disruption

Geoff Colvin is an award-winning thinker, author, broadcaster and speaker on today's most significant trends in business. As *Fortune's* Senior Editor-At-Large, he is considered one of America's sharpest and most respected commentators on leadership, globalization, wealth creation, and the infotech revolution, and related issues. As anchor of *Wall Street Week with Fortune* on PBS, he spoke each week to the largest audience reached by any business television program in America.

Margaret Franklin, CFA

President and CEO, *CFA Institute*

Margaret "Marg" Franklin, CFA, is president and CEO of CFA Institute. She has been a leader in the investment management industry for 28 years, most recently as president of BNY Mellon Wealth Management in Canada and head of International Wealth Management in North America. Her deep practitioner experience has been gained at firms ranging from large, global asset managers to start-ups, including Marret Private Wealth, State Street Global Advisors, and Barclays Global Investors. Her work has included advising individuals, families, pension plans, endowments, foundations and government agencies. In 2011, Franklin served as chair of the Board of Governors of CFA Institute, which is a volunteer position, and is a member of CFA Society Toronto, where she has also served on its board. She is a founding member of the CFA Institute Women in Investment Initiative, a past recipient of its Alfred C. Morley Distinguished Service Award in 2014, and a member of its Future of Finance Content Council.



About CFA Society Calgary

CFA Society Calgary was established in 1976. As a CFA Institute member society, our society connects members to a global network of investment professionals. CFA Society Calgary currently has more than 1700 members, with just over 90% of our membership holding the Chartered Financial Analyst designation.

CFA Society Calgary runs a year-round program of events aimed primarily at the continuing education of our members, although non-members are also welcomed to attend most of our functions. Regular events include the President's Dinner in the fall (in honour of past presidents and new CFA charterholders), and the Forecast Dinner in January (in which prominent members of the investment community offer their predictions for the year ahead).

About CFA Society Edmonton

CFA Society Edmonton was established in 1976 to provide a professional association for individuals in the investment community. Our membership currently consists of investment counselors, pension fund managers, corporate treasury, and stockbrokers. 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.

About CFA Society Winnipeg

CFA Society Winnipeg has served the Winnipeg investment community since 1952 by promoting ethical and professional standards within the investment industry. Our society is an active participant and innovator within our international organization - [CFA Institute](#). In addition, CFA Society Winnipeg provides our 300 plus members with professional development and educational learning opportunities, job placement services and membership networking events. As one of the 159 member societies of CFA Institute, our society connects members to a global network of investment professionals.



CFA SOCIETY WINNIPEG SPONSORSHIP

WINE & CHEESE SPONSOR

\$6000

10 Complimentary Tickets

Number of sponsors available: 1

The Wine & Cheese sponsor delivers premium level recognition throughout the Annual Forecast Experience. Your firm plays a key role in attracting registrations and the overall success of the event. Your firm receives the highest level of recognition throughout the society's largest annual event. The first 100 registrants will receive a basket of goodies (wine & charcuterie board) from local Winnipeg businesses.

- Corporate Ad in event program
- Prominent display of firm name during event
- Recognition of sponsorship
- Promotion invitations/email announcements (sent to 300+ members and new charterholders)
- Recognition on CFA Society Winnipeg website homepage
- Acknowledgement in annual report
- Become a partner sponsor for 2021 at a discount (+1500)

FORECAST

\$2500

Number of sponsors available: 1

The Forecast sponsorship is a prestigious and exclusive opportunity during the society's largest annual event. As the Forecast sponsor, your firm receives substantial brand exposure via our digital channels. In addition, the firm gains recognition throughout the program, on our promotional invitations, and email announcements. The firm also has the opportunity to announce Forecaster of the year during our presentation.

- Firm branding on Forecaster of the year presentation
- Opportunity to announce forecast winners
- Corporate Ad in Event program (distributed to all attendees)
- Recognition of sponsorship
- Promotion invitations/email announcements (sent to 300+ members and new charterholders)
- Recognition on CFA Society Winnipeg website homepage
- Acknowledgement in annual report
- Become a partner sponsor for 2021 at a discount (+1500)

SILVER

\$2500

10 Complimentary Tickets

- Corporate Ad in event program
- Recognition of sponsorship at the event
- Promotion invitations/email announcements (sent to 300+ members and new charterholders)
- Recognition on CFA Society Winnipeg website homepage
- Acknowledgement in annual report
- Become a partner sponsor for 2021 at a discount (+1500)
- Breakout room to be named after sponsor (TBD)

BRONZE

\$1000

- Corporate logo in all marketing material
- Recognition of sponsorship
- Promotion invitations/email announcements (sent to 300+ members and new charterholders)
- Recognition on CFA Society Winnipeg website homepage
- Acknowledgement in annual report