CFA Society Minnesota



2027 Annual Dinner

Sponsorship Opportunities

February 11, 2027

Showcase your firm at CFA Society Minnesota's 2027 Annual Dinner! Connect with investment professionals and industry leaders at this signature event while gaining valuable visibility and demonstrating your support for Minnesota's investment community.

350
Estimated Attendees

Sponsorship Levels

Platinum	$10,000	1 available
Gold	$7,500	2 available
Silver	$5,000	3 available
Bronze	$3,500	5 available
Table	$2,500	20 available

Become a Sponsor

Partner with CFA Society Minnesota to connect with investment professionals and showcase your firm.

sponsorship@cfamn.org
(612) 317-2888

See page 4 for details

About Our Speaker

Katherine Krantz
Managing Director - Portfolio Strategy
BMO



Katherine Krantz joined BMO Capital Markets in 2025 as Managing Director, Macro Strategy. She is a co-founder and former CEO of The Macro Institute, a boutique firm specializing in macro investment training. Katherine has extensive experience in macroeconomic analysis and investment strategy, having held senior research roles at UBS and Cornerstone Macro, as well as prior roles in wealth management. She earned an MA in Economics and Econometrics from McGill University and a BA in Economics and Mathematical Methods from Northwestern University. Katherine also holds the M²SD designation.

About CFA Society Minnesota

Our mission is to advance professional excellence while promoting ethical behavior and fellowship through development and engagement opportunities for our members. Founded in 1952, CFA Society Minnesota is the 12th-largest U.S. chapter of the CFA Institute, the global membership organization that awards the Chartered Financial Analyst (CFA) designation.

www.cfamn.org

Past Annual Dinner Sponsors

We appreciate your generous support!

Abbot Downing
Advanced Capital Group
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Alliance Investment Management
Allianz Global Investors
Allianz Life
Allspring Global Investments
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(formerly Lindquist & Vennum)
Bell Institutional Investment Management
Berger Financial Group
Bethel University
BlackRock
Bloomberg
Blue Rock Advisors
BMO Wealth Management
BNC National Bank
BNY Mellon Investment Management
Bremer Bank
Bremer Wealth Management
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Capital IQ
Carlson School of Management
Charles Schwab & Company
ColumbiaThreadneedle
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Credit Suisse
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Diamond Hill Capital Management
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Finacorp Securities
First Light Asset Management
First Principles Capital Management
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Garda Capital Partners
Goldman Sachs Asset Management
HARDING LOEVNER
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Hirenomics
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ING U.S. Investment Management
Intrinsic Research Systems
J.P. Morgan Asset Management
John Hancock Investments
Leuthold Weeden Capital Management
Lord Abbett & Co.
Macquaire
Mairs & Power
Marks Group Wealth Management
Meristem Family Wealth
Merrill Lynch—Swenson, Jones & Associates
MFS Investment Management
Minneapolis Portfolio Management Group
Minneapolis-St. Paul Business Journal
Moelis Asset Management
MOMENTUM—Paula Carlson
Morgan Stanley
Morningstar
NEPC, LLC
Newton Investment Management
North Sky Capital
Northland Securities
Nuveen Asset Management
Nuveen Investments
Odinson Partners
Oppenheimer Funds
Orgel Wealth Management
Parametric Portfolio Associates
Peregrine Capital Management
PNC Private Bank
PowerShares by Invesco
Prudential Investments
Punch & Associates Investment Management
Putnam Investments
Quantitative Advantage
RBC Global Asset Management
RBC Wealth Management
RiverSource Investments
Robert Half
S&P Global Market Intelligence
Schwarz Dygos Wheeler Investment Advisors
Securian Asset Management
(formerly Advantus)
ST Capital
(formerly Speece Thorson Capital Group)
State Street Global Advisors
StepStone
Stone Murphy
Summit Creek Advisors
Taft Law Firm
T. Rowe Price
TCW
Tealwood Asset Management
The Boston Company
The Private Client Reserve of U.S. Bank
The Travelers Companies
Thrivent Mutual Funds
U.S. Bank
Ulland Investment Advisors
US Bancorp Asset Management
Värde Partners
Voya Investment Management
Wells Capital Management
Wells Fargo The Private Bank
Whitebox Advisors
Windsor Financial
WisdomTree Investments

To be part of this signature event, contact us at (612) 317-2888 or sponsorship@cfamn.org

Sponsorship Benefits

Act today to reserve your sponsorship opportunity!

Benefits	Sponsorship Levels If you're interested in a different option, ask about a custom package.				
	Platinum * $10,000	**Gold * $7,500**	**Silver * $5,000**	**Bronze $3,500**	**Table $2,500**
Available sponsorships at each level	1	2	3	5	20
Table(s) of 8 included in sponsorship	2	2	1	1	1
Preferential table placement	Front Row Adjacent to head table	Front Row	Near Front	Forward	Forward
Name listed in event program	Firm Logo	Firm Logo	Firm Logo	Firm Logo	Firm Name
Recognition display prior to dinner	Firm Logo	Firm Logo	Firm Logo	Firm Logo	Firm Name
Recognition during opening remarks	Firm Logo	Firm Logo	Firm Logo	Firm Logo	Firm Name
Prominent display of firm name on table	●	●	●	●	●
Firm name included in press release	●	●	●	●	●
Logo on website event page (before and after the event)	●	●	●	●	
Ad in Newsletter *(weekly distribution of 5,000+)*	●	●	●	●	
Logo on event signage	●	●	●	●	
2 shoutouts on social media	●	●	●		
Right of first refusal for a 2028 Annual Dinner Sponsorship *(price subject to change; deadline to commit is 12/15/2026)*	●				
Logo on event name tags and collateral	●				

NOTE: All Medallion* Sponsors at the Platinum, Gold, and Silver levels, and their guests are invited to a private pre-reception with a hosted bar and hors d'oeuvres.

2027 Annual Dinner Sponsorship Agreement

Dinner Sponsorships

☐ Platinum	$10,000
☐ Gold	$7,500
☐ Silver	$5,000
☐ Bronze	$3,500
☐ Table of 8	$2,500

Payment

☐ Invoice requested
☐ Check included *(PREFERRED)*

Additional Underwriting Opportunities

☐ Grand Reception	$3,500
☐ Flowers/Table Decorations	$3,000
☐ Dinner Wine	$2,500
☐ Speaker Gift(s)	$1,500
☐ Photographer	$2,000

Note: Each underwriting opportunity is limited to just one sponsor, but a sponsor may purchase more than one opportunity.

We hereby agree to become a 2027 CFA Society Minnesota Annual Dinner Sponsor at the level and payment plan indicated above, and agree to the terms and conditions outlined.

Primary Sponsor Contact Name

CFA Society of Minnesota Contact
(if different; e.g., board member)

Organization Name
(as you wish it to appear on sponsorship publicity)

Mailing Address

Primary Contact Phone

Primary Contact Email

Organization Website
(as you wish it to appear on sponsorship publicity)

Authorized Signature
(if authorized party is different than primary contact, please print and sign name)

Date

Please remit this agreement and payment to:

CFA Society Minnesota

121 South 8th Street | Suite 825 | Minneapolis | MN | 55402