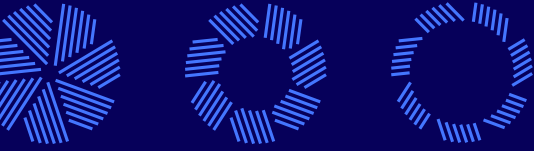




Promote Your Brand.  
Heighten Your Visibility.  
Connect with Our Community.



## CFA Society Stamford 2026 Forecast Dinner

Thursday, 19 March, 2026  
Rockrimmon Country Club

**Cocktail Reception: 5:30 – 6:30 PM**  
**Dinner & Program: 6:30 – 8:00 PM**  
**Post-Event Networking: 8:00 – 9:00 PM**

Join us for our premier networking event of the year. Partner with CFA Society Stamford and reach our over 700 members plus an audience which includes over 3,500 investment professionals who live or work in our local society area.

## 2026 Partnerships

Partnership offers valuable exposure at the Forecast Dinner and on the Society's website, along with opportunities to engage directly with our members and guests through speaking engagements at Society-hosted events. **Please see next page for 2026 Partnership Opportunities.**

**For more information contact:**

Margaret Kelleher  
*Executive Director*  
CFA Society Stamford

[partnerships@cfasocietystamford.org](mailto:partnerships@cfasocietystamford.org)

# 2026 Forecast Dinner

19 March 2026 | 5:30 PM  
Rockrimmon Country Club



KEYNOTE SPEAKER

**Jeff McMillan**

*Senior AI Advisor and  
former Head of Firmwide AI  
Morgan Stanley*



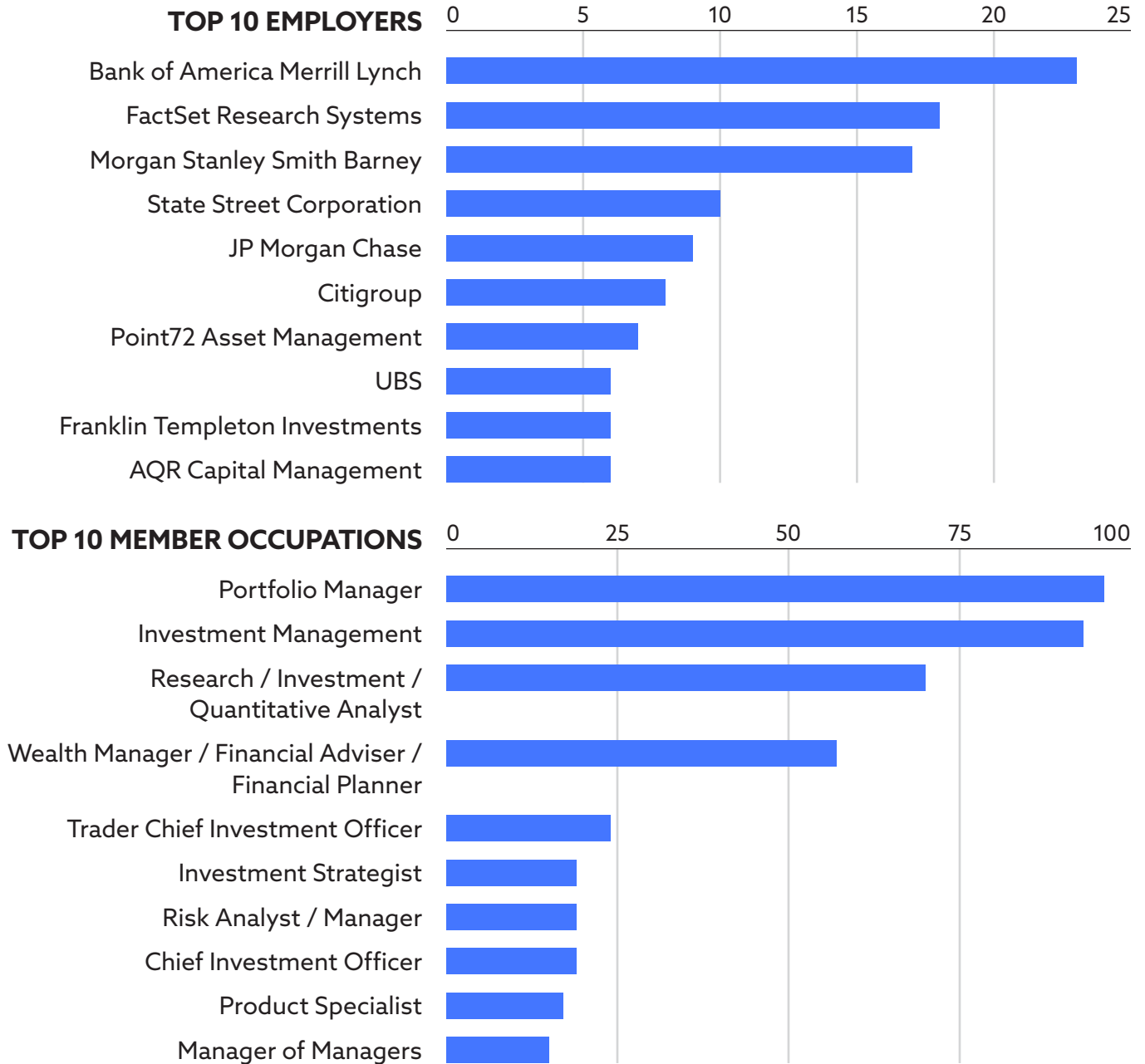
# CFA Society Stamford

2026 PARTNERSHIP LEVELS	Leadership Circle \$5,000	Premier \$4,000	Gold \$3,000	Silver \$2,000	Swag Sponsor \$1,500
Number of Partnerships Available	3	3	5	4	2
<b>Forecast Dinner Benefits</b>					
Forecast dinner table (10 guests per table)	1 Table	1 Table	1 Table	1 Table	2 Tickets
Display of company name on table as a sponsor	●	●	●	●	-
List of event registrants (Name & Company)	●	●	●	●	●
Company name/logo listed in event program	●	●	●	●	●
Digital recognition in promotional emails	Dedicated Page	●	●	●	-
Priority table placement	Front Row	Front / Second Row	Second / Third Row	-	-
Advertisement in program booklet	Full Page Priority Placement	Full Page	Half Page	-	-
Company name/logo on event signage	●	●	-	-	-
Branded swag gifts for attendees at exit table	-	-	-	-	Company name on swag
Company name/logo on signage	●	●	-	-	-
Company logo projected on screen as a sponsor during program	●	●	-	-	-
Sponsor table collateral display in reception area	●	-	-	-	-
<b>2026 Year-Round Benefits</b>					
Digital recognition on CFA Society Stamford website and in monthly newsletters	●	●	●	●	●
Collaboration on one virtual event	●	●	-	-	-
Collaboration on one in-person event	●	-	-	-	-
Promotion of one of your company events in CFA Society Stamford Newsletter	●	-	-	-	-



## Member Demographics (As of January 2026)

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# CFA Society Stamford

## Our Mission

Our mission is to lead the investment profession locally by promoting the highest standards of excellence, education, professional excellence and fellowship for the benefit of the local community.

## Our Membership

Our membership includes over seven hundred investment professionals who live and work in the Fairfield County and New York Metro area, plus an audience which includes over 3,500 investment professionals who live or work in our geographic area.

## Our History

The CFA Society Stamford was incorporated in 1998 as a non-profit organization to serve the financial community and our CFA Charterholder members. We are a local chapter that is affiliated with the CFA Institute and share a common goal to promote the highest standards of ethics, education, and professional excellence.

## Our Programs and Community Engagement

We offer high quality programs on topics that provide opportunities for our members and extended community to expand their knowledge, professional development and network with others in our industry.

Read more about us by visiting our [website](#) now.

**For more information or to secure your partnership,  
please contact:**

Margaret Kelleher  
*Executive Director*  
CFA Society Stamford

[partnerships@cfasocietystamford.org](mailto:partnerships@cfasocietystamford.org)