



CFA Society
Hartford



2023 Annual Forecast Event

Connecticut Convention Center-
February 23, 2023
5:00 PM - 9:00 PM

Sponsorship Opportunities



Event Overview

Global Market Outlook by Jeffrey Kleintop, CFA

2023 Annual Forecast Event

February 23, 2023

Hybrid Event

Connecticut Convention Center 5:00 PM - 8:00 PM

Live-Stream 6:45 - 8:00 PM

Please join the CFA Society Hartford as we celebrate our 2023 Annual Forecast Dinner on February 23, 2023. This is the Society's premier networking event of the year, bringing together over 400 of the Hartford area's leading investment and financial professionals as well as key decision makers in other local organizations. Sponsorship Opportunities provide firm exposure at the Annual Forecast Event and on the Society website, as well as networking opportunities to engage our members and guests throughout the year at periodic luncheons and conferences hosted by the Society.

Sponsorship levels start at \$500. and continue to a Gold Sponsorship at \$5,500.

AGENDA

5:00 PM

Networking / Social Hour
Exhibitors

5:15 - 5:30 PM

Private Meet & Greet
with Keynote Speaker

6:00 PM

Dining Room Opens

6:30 PM

Dinner

6:45 PM

Welcome

James Newman, CFA
President, CFA Society Hartford

Keynote Speaker

Jeffrey Kleintop, CFA
Managing Director, Chief Global Investment
Strategist
Charles Schwab & Co., Inc.

Global Market Outlook

Join us for a 2023 global economic update from Charles Schwab's Chief Global Investment Strategist, Jeffrey Kleintop. Jeffrey will provide commentary on the latest trends and events impacting international markets, and attendees will walk away with actionable insights to guide investment allocation.



Keynote Speaker

Jeffrey Kleintop, CFA
Managing Director, Chief Global
Investment Strategist
Charles Schwab & Co., Inc.

Jeffrey Kleintop, CFA®, is Managing Director and the Chief Global Investment Strategist at Charles Schwab. He is responsible for analyzing and discussing international markets, trends, and events to help U.S. investors understand their significance and financial implications. In this role, Kleintop provides actionable insights through social media posts (@JeffreyKleintop), written commentary on Schwab.com, videos, conference calls, webcasts, and in-person events.

Kleintop is frequently cited in a range of national media outlets including The Wall Street Journal, The New York Times, Barron's, and the Financial Times. He is a regular guest on high-profile news networks including CNBC (including CNBC Asia), Bloomberg, Yahoo! Finance, and CNN. Kleintop has been cited in The Wall Street Journal as one of "Wall Street's best and brightest," and he has been a featured keynote speaker at industry events. Kleintop is the author of the investing book *Market Evolution: How to Profit in Today's Changing Financial Markets*, published by John Wiley & Sons in 2006.

Prior to joining Schwab, Jeffrey served as chief market strategist at LPL Financial. Earlier in his career he was chief investment strategist at PNC.

Kleintop received his Master of Business Administration from Pennsylvania State University and earned his Bachelor of Science in business administration from the University of Delaware. He is a Chartered Financial Analyst (CFA®).

ABOUT

CFA Society Hartford

CFA Society Hartford is one of the leading associations of local investment professionals in Connecticut, steeped in rich history spanning over 60 years. The non-profit organization has been serving Connecticut since 1953.

TOP EMPLOYERS

CFA Society Hartford Members

The Society's membership is well represented in all the leading financial institutions in the area: CIGNA, Conning Asset Management, Fiduciary Investment Advisors, HIMCO, Prudential, Virtus Investment Partners, VOYA, Webster Bank and more.

SPONSORSHIP

Contacts

To secure sponsorship opportunities and gain access to investment professionals attending the 2023 Annual Forecast Dinner, please contact:

Rebecca Taylor
administrator@hartfordcfa.org
(860) 604-1411

Ian Green
Forecast Dinner Chair and
Vice President Advocacy
Forecast@HartfordCFA.org

DEMOGRAPHICS Attendees

The attendee profile reflects aggregate data from the past five Annual Forecast Events.

371

Average Investment
Professional
Attendees

Attendee Occupation



- Portfolio Manager (32%)
- Chief-Level Executive (14%)
- Research Analyst (9%)
- Consultant (7%)
- Relationship Manager (7%)
- Manager of Managers (5%)
- Financial Advisor (5%)
- Strategists (4%)
- Risk Managers (4%)
- Other (13%)

Top Firms Represented



- The Hartford (16%)
- Conning (15%)
- Virtus/Newfleet (9%)
- Fiduciary Investment Advisors (7%)
- MassMutual (7%)
- Prudential (7%)
- VOYA (6%)
- Business Schools/Universities (5%)
- CIGNA (5%)
- Webster Bank (5%)
- Other Firms (18%)

SPONSORSHIP Opportunities

All benefits are dependent on the Sponsor providing the required materials and information prior to deadlines.

	Streaming \$1,500	Gold \$5,500	Silver \$3,500	Bronze \$2,500	Non-Profit \$1,000
Number of Sponsorships available at each level	5	6	6	10	10
Pre-Event Benefits					
Pre-event Marketing including Social Media campaign	Logo	Logo	Logo	Business Name	Organization Name
Listing as sponsor in Annual Meeting eblasts/digital invitations	Logo	Logo	Logo	Business Name	Organization Name
Event Benefits					
Annual Dinner guest tickets (10 guests per table) Additional tables \$1,150/each	8 \$50 UberEats	20 tickets 2 Tables	10 tickets Full Table	5 tickets 1/2 Table	2 tickets
Meet & Great with Keynote speaker for 1 hour with 30 guests prior to social/dinner (1 available add \$1500 - first come, first serve)		●			
Prime table placement of corporate sponsored tables at Annual Dinner		Front Center	Towards Center		
Prominent display of logo on tables as an event sponsor		●	●	●	
Full color advertisement in the Program Booklet	1/4 Page	Full Page	1/2 Page	1/4 Page	
Firm name, description, and logo listed in Annual Dinner Program	●	●	●	●	●
Private 20-minute Zoom Networking Rooms. Room is named after Sponsor	●				
Firm logo as a sponsor on signage at Annual Dinner Attendee Registration	●	●	●	●	●
Firm name/logo as a sponsor on signage at Social Hour		●			
Exhibitor Table (8'x30") in Social Hour/Reception area		●	●	●	
Firm Logo Display: projection screens will display logo image as a sponsor multiple times during program	On Stream Only	On Stream & In Person	In Person Only	In Person Only	In Person Only
Special recognition as a sponsor during President's Opening Remarks	General	By Name	By Name	General	General
Post-Event Benefits					
List of attendees including Name*, Company and Job Title (Name is an opt in field)		●			
Priority Speaker at CFA Society Hartford Education Luncheon(s)*		●			
Listing as sponsor in Society's post-event Newsletter and one year listing on CFA website with organization/business description.	Logo & Company Description	Logo & Company Description	Logo & Company Description	Logo	Logo

*Based on request from Sponsor and Sponsor's business alignment with program topic

MEET & GREET
with Keynote Speaker

During the reception, a private room with refreshments will be set up for the 30 guests of (1) Gold Sponsor for an additional \$2000.00 to meet and network with keynote speaker.

This is an exclusive benefit of the one (1) Gold Sponsor. First Come, First Serve.

SPONSORSHIP Additional Opportunities

SWAG - Attendee Gifts

\$2000.

- Provided to guests attending in-person
- Only one sponsorship available
- Acknowledgment during event opening
- Representative from Sponsor to hand out the gifts to attendees along with Signage

Forecast Contest

\$500.

- 2023 Forecast Contest Named after Sponsor
- Ability to choose the 6 contest questions (due by February 1st)
- Logo on the contest form (digital & printed)
- 1/8" page Ad in Program (digital & printed)
- Presented at the event for in-person and virtually for live streaming guests
- Only one sponsorship available

Program Advertising

\$140-\$450.

The CFA Society Hartford Forecast Dinner program is a great place to get the word out about your company. With more than 500 printed for in-person guests and a digital version for live streaming audience, our program advertisements reach hundreds of leading investment and financial professionals.

We offer many advertising options to fit every budget and every need. Select from three size options.

Add (1) ticket to the Forecast Dinner for an additional \$60.

Ads are due by January 13th.

Full Color Advertisements

1/8" Page, 1.25" x 2.5"
\$140.00

Quarter Page, 1.75" High x 5" Wide or 5" x 1.75" Wide
\$150.00

Half Page, 3.75" High x 5" Wide
\$250.00

Full Page, 7-1/2" High x 5" Wide
\$450.00



*Example of an
Advertisement*