



**CFA Society
Chicago**

Sponsorship opportunities

Reach elite investment professionals

CFA Society Chicago

32nd Annual Dinner

Thursday, October 25, 2018

Hyatt Regency Chicago

Reception 5 p.m. | Dinner 6 p.m.

As our premier networking event of the year, this event brings together over 1,000 of Chicago's leading investment professionals and key decision-makers. Support your society member-employees and honor newly inducted charterholders by sponsoring the event and reserving your corporate tables today.

Hortense Friedman, CFA,
Award for Excellence
Brian Singer, CFA

Sponsorship levels

Premier Level - \$15,000

Platinum - \$10,000

Gold - \$6,000

Silver - \$4,000

Bronze - \$2,500

See next page for benefits.

Secure your spot by June 29th and receive one extra ticket to exclusive VIP Reception with keynote speaker, Richard H. Thaler.

Reserve now

(312) 251-1301

sponsorship@cfachicago.org



Richard H. Thaler
Photo courtesy of CFA Institute

Keynote speaker: Richard H. Thaler

- Charles R. Walgreen Distinguished Service Professor of Behavioral Science and Economics at the University of Chicago Booth School of Business
- 2017 recipient of the Nobel Memorial Prize in Economic Sciences for his contributions to behavioral economics
- Director of the Center for Decision Research, and co-director of the Behavioral Economics Project at the National Bureau of Economic Research
- Co-authored *Nudge: Improving Decisions about Health, Wealth and Happiness* (2008) and published *Misbehaving: The Making of Behavioral Economics* (2015)

Sponsorship benefits

Benefit from our wide array of sponsorship opportunities, contact (312) 251-1301 or sponsorship@cfachicago.org.



Premier, Platinum, Gold and Silver opportunities are limited and sold out early in 2017!

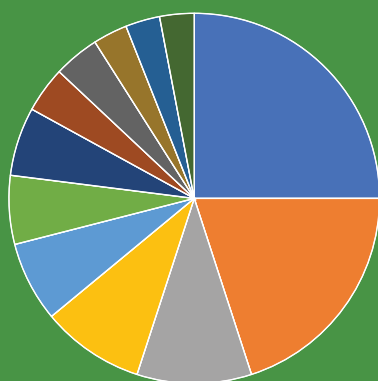
| Annual Dinner Sponsorship Levels | Premier \$15,000 | Platinum \$10,000 | Gold \$6,000 | Silver \$4,000 | Bronze \$2,500 |
|--|---------------------|----------------------|-----------------|----------------------------------|-------------------|
| Number of sponsorships available at each level | 3 | 5 | 10 | 5 | Unlimited |
| Annual Dinner Guest Tickets (10 guests per table) Additional tables can be purchased for \$1,500/each | 2 Tables | 1 Table | 1 Table | 2 Guests (table not included) | 1 Table |
| Prominent Display of Firm Name on Table as a sponsor | • | • | • | N/A | • |
| Recognition of sponsors in Email Announcements (sent to 4,700+ members and new CFA charterholders) | By Name | By Name | By Name | By Name | General |
| Special Recognition as a sponsor during Chairman's Opening Remarks | By Name | By Name | By Name | General | General |
| Firm name promoted as sponsor in Annual Dinner Program | • | • | • | • | • |
| Firm Logo Display: Projection screens will display logo image as a sponsor multiple times during program | Enhanced | Enhanced | Enhanced | General | General |
| Invitations to exclusive VIP Reception with Keynote Speaker (pay in full by June 29, 2018 and receive one extra ticket to exclusive VIP Reception with Keynote Speaker) | Five | Two | One | Two | One |
| Firm name/logo listed as a sponsor on Signage at Reception | • | • | • | • | |
| Corporate name printed as a sponsor in Formal Invitation mailed to members and new CFA charterholders (must pay in full by August 10, 2018) | Enhanced | • | • | • | |
| Full or Half Page in Annual Dinner Program for sponsor recognition and non-advertising message | Full Page | Full Page | Half Page | Half Page | |
| Five (5) Event Function Tickets to be applied towards eligible CFA Society Chicago programs (good through June 28, 2019) | • | • | • | | |
| Opportunity to provide Company Materials (near registration table) | • | • | • | | |
| Additional Exclusive Placement in Annual Dinner Program highlighting firm name as a sponsor | Inside Cover | Back Cover | | | |
| One year listing on CFA Society Chicago Website as a sponsor with logo (over 9,000 hits/month) | • | • | | | |
| Social Media Mentions and thank you on CFA Society Chicago accounts (Twitter, Facebook and LinkedIn) | • | • | | | |
| Prime Table Placement of corporate sponsored tables at Annual Dinner | In Front | Near Front | | | |
| Firm name listed as sponsor on Cocktail Napkins | • | | | | |
| Illuminated Firm Name as a sponsor in prominent area | • | | | | |
| Firm name/logo listed as a sponsor on Promotional Item (TBD by CFA Society Chicago) | • | | | | |
| Opportunity to secure company table near VIP Table at All Society Luncheon Programs (good through June 28, 2019) | • | | | | |

Special thanks

to our honored guests and the leaders who support our mission

Snapshot of attendees

96%
are CFA
Charterholders



By profession

- Portfolio Manager - 25%
- Research Analyst - 20%
- Consultant - 10%
- Other - 9%
- Chief-Level Executive - 7%
- Relationship Manager - 6%
- Financial Advisor - 6%
- Corporate Financial Analyst - 4%
- Risk Manager - 4%
- Strategist - 3%
- Manager of Managers - 3%
- Trader - 3%

Data represents CFA Society Chicago membership profile

2017 Dinner sponsors

Premier

Northern Trust
PowerShares QQQ by Invesco

Platinum

J.P. Morgan
Notre Dame Mendoza
College of Business
Nuveen
William Blair

Gold



Aviva Investors
Calamos Investments
Fitch Ratings
Glenmede Investment Management
Harbor Capital Advisors
Legal & General Investment
Management America
Segall Bryant & Hamill
State Street Global Advisors
T. Rowe Price
Thomas White International, Ltd.
UBS

Silver



BlackRock
BMO Global Asset Management
Mesirow Financial
MSCI
Stifel

Bronze

ACA Compliance Group
Adams Street Partners
Aegon Asset Management
Alliance Bernstein
Allianz Global Investors
Allstate Investments
Aon Hewitt Investment Consulting, Inc.
Ariel Investments
Baron Capital
BNY Mellon / Dreyfus

Bronze continued

Brownson, Rehms & Foxworth
Channing Capital Management, LLC.
Chicago Equity Partners
Chicago Fundamental Investment Partners
CIBC
Columbia Threadneedle
Columbia Wanger Asset Management
Cowen
Dimensional Fund Advisors
Duff & Phelps Investment Management Co.
Eaton Vance
Epoch Investment Partners, Inc.
Fidelity Investments
Illinois Tech Stuart School of Business
Jackson National Asset Management
Manulife Asset Management
Marquette Associates
Morningstar
OFI Global
Penserra
PPM America, Inc.
Putnam Investments
RBC Global Asset Management
Schroders Investment Management
Segal Marco Advisors
Select Sector SPDRs
The Carlyle Group
The University of Chicago
Thomson Reuters
U.S. Trust
Vanguard
Voya

Past Annual Dinner Sponsors

| | |
|------------------------------------|--|
| Bernardi Securities | OakBrook Investments, LLC |
| Callan Associates Inc. | Pavillion Advisory Group Inc. |
| Chicago Board Options Exchange | Performance Trust Investment Advisors |
| Citi | Perkins Investment Management |
| CTC myCFO™ | Pioneer Investments |
| Credit Suisse | PNC Wealth Management |
| Dovenmuehle | PricewaterhouseCoopers, LLP |
| Eastspring Investments | ProManage, LLC |
| eVestment | Pyramis Global Advisors |
| Goldman, Sachs & Co. | Robert Half |
| Grosvenor Capital Management, L.P. | Wells Fargo Private Bank |
| Harris Associates | WisdomTree Asset Management |
| Heidrick & Struggles | Ziegler Capital Management |
| Keeley Asset Management | |
| Manning & Napier | |
| Neuberger Berman | |