

CFA[®] Societies of the Southeastern US Leadership Conference

March 19 - 20, 2020

Holiday Inn
Charlotte-Center City
230 N College St
Charlotte, NC 28202

Presented by



Become a sponsor of the CFA® Societies of the Southeastern US Leadership Conference. Deepen relationships with Society leaders, participate in informative sessions and create profit opportunities in your region.

Event Overview

Leaders of CFA® Societies of the Southeastern US will gather with industry thought leaders to network and develop strategies for meeting the needs of their members, industry partners, and communities.



6,409 Members

16 Societies

10% of CFA Institute membership in USA

Why Sponsor this Leadership Conference?

- Develop relationships with committed volunteers and involved leaders in the profession who can assist you with opening doors and opportunities to connect on a local level.
- Increase your impression beyond the typical conference to reach leaders that host meetings of 50 to 100+ members.



40%
Portfolio
Managers



63%
Institutional
Assets



37%
Private
Wealth

Top Employers

Wells Fargo | Bank of America
Merrill Lynch | SunTrust
Raymond James | Invesco
BB&T | Morgan Stanley
Regions | UBS | Voya | Northern
Trust

Participating Societies

Alabama
Louisville
Naples
South Carolina

Atlanta
Memphis
Nashville
South Florida

East Tennessee
Miami
North Carolina
Tampa Bay

Jacksonville
Mississippi
Orlando
Virginia

Sponsorship Opportunities

All sponsorship opportunities include recognition on CFA® Societies of the Southeastern US Leadership Conference website with a link to the sponsor's website, sponsor ribbons for your company's attendees, recognition on signage, acknowledgment during the general sessions. We appreciate your consideration of sponsorship support.

| Sponsor Benefits | Presenting Partner | Gold | Silver |
|--|--------------------|----------------|----------------|
| Opportunities Available | Sold | 6 | 6 |
| Speaking Opportunity | ● | | |
| Partner Showcase 5 minutes on who you are, why you want to partner with CFA Societies | | ● | |
| Introduce Participate in Breakout Session | | ● | |
| Exhibit Table | ● | ● | ● |
| Logo recognition company description featured in event program | ● | ● | ● |
| Conference Registrations | 3 | 2 | 2 |
| Recognition during general sessions | ● | ● | ● |
| Recognition in conference marketing | ● | ● | ● |
| Post conference attendee mailing list* | ● | ● | ● |
| Cost | \$7,500 | \$5,000 | \$2,500 |

| Additional Opportunities | | | |
|---------------------------------|---------------|--------------------------|-----------------------|
| A/V Sponsor | Event Program | Beverage Snack Service | Lanyard Name Badges |

CFA[®] Societies of the Southeastern US Leadership Conference

Register to be a Sponsor by emailing
or mailing completed forms to:

Sheri Gillette
3004 Oxbow Ct
Raleigh, NC 27613
sbgillette@ncrrbiz.com

SPONSOR LEVELS:

| | |
|--------------------|---------|
| Presenting Partner | \$7,500 |
| Gold Sponsor | \$5,000 |
| Silver Sponsor | \$2,500 |

For sponsorship payment inquiries,
please contact
Sheri Gillette
sbgillette@ncrrbiz.com

Please send company logo to
sbgillette@ncrrbiz.com
February 10, 2020.

Partnership Package Chosen _____

Company & Attendee Information

Company Name _____

Conference Rep Name _____

Title _____

Address _____

City _____

State _____ ZIP _____

Phone _____

Email _____

Web Site _____

Check here to be invoiced.

Billing Information

Contact Name _____

Title _____

Address _____

City _____

State _____ ZIP _____

Phone _____

Email _____

Payment Type

Check Enclosed American Express

Mastercard/VISA

Payment Amount: _____

Account Number: _____

CVV: _____

Name on Account: _____

Expiration Date: _____

Signature: _____

