



# About the CFA Society of San Diego

## OUR MISSION

The mission of the CFASDD is to serve the needs of professionals in the investment decision making process by providing a forum for the exchange of information and ideas among its members, by enhancing members' investment knowledge, and by encouraging high ethical standards and professional conduct among all participants in the investment industry.

## WHO WE ARE

The CFA Society of San Diego was founded in 1962 as the Financial Analysts Society of San Diego, Inc. to promote a high standard of ethics and sound professional standards of investment management and research, and to enhance professional knowledge and skills. The Society was admitted to the Association for Investment Management and Research (AIMR) on November 4, 1963. In May 2004, AIMR became CFA Institute and in May 2005, the Society changed its name to CFA Society of San Diego (CFASDD), in order to more closely align with the CFA Institute and the Chartered Financial Analyst (CFA®) designation.

There are approximately 400 members of the CFASDD, including security analysts, portfolio managers, bankers, and other investment professionals. Approximately 330 CFASDD members hold the Chartered Financial Analyst designation, and many others are currently candidates for this professional designation.

## AMONG US:

- ◆ Over 170 members work for firms with more than \$1 billion under management.
- ◆ Over 140 members have the title of CEO, CFO, CIO, COO or Director of Research
- ◆ Over 90 members work for firms with more than 50 employees
- ◆ Over 60 members have training / professional development responsibilities
- ◆ Over 50 members have hiring responsibilities

## INDUSTRY REPRESENTATION:

- ◆ 90 members work for Money Managers (Institutional, Mutual Funds & Hedge Funds )
- ◆ 116 members work for Sponsors (Private Clients, Inst., Pensions, Foundations)
- ◆ 30 members work for Consultant / Research Firms





### **ANNUAL FORECAST DINNER (FEBRUARY)**

This event began in 2007 and has quickly become the premier Forecast event for Southern California CFA Societies. Over 250 investment professionals, clients and guests from all over Southern California attend each year to enjoy an elegant dinner and world class speakers who share their views on the market environment and strategies.

#### **Previous speakers include:**

- ♦ Charles Brandes — *Chairman, Brandes Investment Partners*
- ♦ Howard Roth — *Chief Economist, California Department of Finance*
- ♦ Sam Stovall — *Chief Investment Strategist, Standard & Poors*
- ♦ Chris Thornberg — *Principal, Beacon Economics*
- ♦ Horacio Valerias — *Chief Investment Officer, Nicholas Applegate Capital Management*

### **ANNUAL SOCIAL/CHARTER AWARD CEREMONY (EARLY NOVEMBER)**

This event brings the largest number of CFASDD members to a single event each year. As a social dinner hosted at a venue that provides a festive and entertaining atmosphere, members have the opportunity to interact with each other and enjoy one of the many cultural gems that San Diego has to offer. The evening is concluded with the CFA Charter Award Ceremony, where the new CFA Charterholders of San Diego are awarded their designation and welcomed into the CFASDD membership.

#### **Previous venues include:**

- ♦ University Club/San Diego Symphony
- ♦ The Museum of Man
- ♦ Natural History Museum
- ♦ Hall of Champions Sports Museum
- ♦ Birch Aquarium



## About Our Events & Sponsor Benefits (cont.)

### **MONTHLY LUNCHEON AND NETWORKING EVENTS (YEAR ROUND)**

Designed primarily to provide our membership with regular access to continuing education and thought leaders in the industry, our monthly luncheons offer presentations on a wide range of investment topics. The luncheons are typically held mid-week at an upscale hotel venue and have an average attendance of 50-75 members and non-member guests.

#### **Sample of previous speakers include:**

- ◆ Rob Arnott
- ◆ The Brandes Institute
- ◆ Michael Mauboussin
- ◆ Luis Maizel
- ◆ Larry Spiedell
- ◆ Howard Schilit

The networking events are set in social environments optimal for networking and conversation. Examples of recent events would include our Annual Wine Tasting event as well as the CFASSD Day At the Races at the Del Mar Race Track.

### **CFASSD STUDENT MEMBERSHIP**

CFASSD has partnered with the three major universities in San Diego to offer a student membership category that gives students access to job listings, programs, social gatherings, and networking events with peers and CFASSD's professional membership—some of San Diego's most well-known and successful financial professionals. CFASSD's Student Membership is available only to those who are matriculating toward a bachelor's or master's degree in finance, business or discipline related to the investment decision-making process at an accredited college/university, and maintain at least a 3.0 grade point average.

Each year a University Investment Challenge competition is sponsored by the CFASSD to allow student members from the major universities to compete against each other for the title of Investment Challenge Champions.

#### **Universities include:**

- ◆ University of California, San Diego (UCSD)
- ◆ University of San Diego (USD)
- ◆ San Diego State University (SDSU)





# Sponsorship Opportunities & Benefits

	PLATINUM	GOLD	SILVER*
	<b>\$12,000</b>	<b>\$10,000</b>	<b>\$5,000</b>
	<i>Limit 2</i>	<i>Limit 3</i>	<i>Limit 5</i>
<b>CFASSD ANNUAL FORECAST DINNER</b>			
♦ Table for 10 Guests	Front row	Preferred	Preferred
♦ Sponsor Recognition in event Program	✓	✓	✓
♦ Sponsor Recognition in event Print Advertising	✓	✓	✓
♦ Reception event Sponsor Marketing Table	✓	✓	✓
<b>CFASSD ANNUAL SOCIAL/CHARTER AWARD CEREMONY</b>			
♦ Table for 10 Guests	Front Row	Preferred	
♦ Sponsor Recognition in event Program	✓	✓	
♦ Sponsor Recognition in event Print Advertising	✓	✓	
<b>CFASSD MONTHLY LUNCHEON/NETWORKING EVENTS</b>			
♦ Opportunity to give company presentation	2	1	
♦ Sponsor signage/logo display at events	4	2	1
♦ Recognition as sponsor at designated level	4	2	1
<b>OTHER ADVERTISING BENEFITS</b>			
♦ CFASSD Website home page sponsor recognition at designated level	12 months	12 months	6 months
♦ Sponsor Signage/Logo at Post CFA Exam Events	✓	✓	
<b>STUDENT MEMBERSHIP EVENTS</b>			
♦ Annual University 'Investment Challenge' program/print sponsor recognition	✓		
♦ Sponsor Marketing display table at Investment Challenge	✓		
♦ Opportunity to give company presentation to CFASSD Student Membership	1		

\* Silver sponsors have the choice of sponsoring either the Annual Forecast Dinner or the Annual Social/Charter Ceremony. Both events include a Preferred table as well as all Sponsor Recognition benefits.





# CFASSD Sponsor Registration Form

**SPONSORSHIP RESERVATIONS:**

- \$12,000 Platinum Sponsor
- \$10,000 Gold Sponsor
- \$5,000 Silver Sponsor

**PAYMENT OPTIONS:**

- Check (Payable to CFA Society of San Diego)
- Credit Card – MasterCard/Visa (circle)
  - Credit Card # and Expiration: .....
  - Credit Card 3 or 4 digit security code: .....
  - Cardholder Signature: .....

**FOR SPONSOR/TABLE RECOGNITION, PLEASE PRINT YOUR NAME AS YOU WISH TO BE RECOGNIZED:**

- ◆ Name and Title: .....
- ◆ Company: .....
- ◆ Address: .....
- ◆ Telephone: .....
- ◆ Email: .....

If you have additional questions regarding CFASSD sponsor opportunities please contact: [president@cfassd.org](mailto:president@cfassd.org) or [programs@cfassd.org](mailto:programs@cfassd.org)

Please fax form to (858) 271-0599  
or mail to: CFASSD  
P.O. Box 928456  
San Diego, CA. 92192-8456  
Website: <http://www.cfassd.org>

