



CFA Society Tampa Bay

CFA Society Tampa Bay is an affiliate of the CFA Institute, the premiere professional organization for CFA Charterholders, investment professionals, educators, financial services providers and students.

Our mission is to enhance the success of our members and lead our local financial community by promoting the highest standards of ethics, education and professional excellence.

Our Primary Service Areas

Ethics & Advocacy – Leading the investment industry forward with courage by taking an active role to advocate for higher ethical standards.

Professional Growth – Helping our members stay current in a continuously evolving profession by offering educational programs.

Career Development – Offering tools and resources to gain an edge and stand out at every step of their careers.



425 Members

6 County Service Area

Hillsborough | Pinellas | Sarasota
Manatee | Polk | Pasco



32%

Portfolio
Managers



29%

Institutional
Assets



70%

Private
Wealth



Top Employers

Raymond James | Northern Trust | Bank of America Merrill Lynch
Franklin Templeton Investments | Citigroup | SunTrust | PwC
JP Morgan Chase | Morgan Stanley | Kopernik Global Investors

Society Partnerships



Forecast 2020 Panelists



Samantha
Azzarello
JP Morgan



Linda
Duessel
Federated



Jennifer
Garbowicz
Bank of
America



Mary Ellen
Stanek
Baird

Forecast 2020 is a leading independent forum on major economic, geopolitical and financial market matters.

Investment professionals throughout the Tampa Bay Area attend to network with peers and hear from our distinguished panelists who discuss the factors they believe will influence our economy for the year ahead.

Our guests include portfolio and wealth managers who represent billions in assets under management, sales and marketing professionals, research analysts, professors, strategists, principals, CEOs, CFOs, and CIOs.

These top professionals represent decision-makers from our area's premier investment firms, pension fund advisors, wealth management firms, family offices, banks, insurance companies, investment counselors, brokers, public agencies, universities, and financial services corporations.



Recognition as a CFA Society Tampa Bay resource partner reinforces your commitment to the success and growth of the profession. By providing you and your company with various vehicles for exposure at meetings and events, we also provide additional exposure through our Society website.

Sponsor Levels	Gold \$1,000	Silver \$750	Bronze \$500
Number of sponsors available at each level	10	10	10
Pre-Event			
Recognition in promotional emails and/or print advertisements	•	•	•
One-time pre-event email	•		
Onsite			
Forecast dinner guest tickets	8 tickets or 1 table	4 tickets	2 tickets
Prominent display of firm name on table	•		
Special recognition during opening ceremonies	By Name	By Name	By Name
Opportunity to place an ad in event program*	Full Page	½ Page	
Name recognition in event program*	•	•	•
Recognition at event reception	•	•	•
Opportunity to provide company materials	•	•	
Post-Event			
12-month recognition on CFATampaBay.org as event sponsor with link to your website	•	•	•
Event tickets to be applied toward eligible CFA Tampa Bay programs/dinners through June 2020	Five	Two	Two

*Benefit subject to printing deadline of February 15, 2020.



Forecast 2020 Society Partnership Commitment Form

Please make checks payable to:

CFA Society Tampa Bay.

If you prefer to use a credit card,
Call Christine at (866) 730-4530.

Upon receipt of invoice, please mail
a copy of this contract with
payment to:

CFA Society Tampa Bay
12157 W. Linebaugh Ave PMB 312
Tampa, FL 33626

Questions? Call

Christine Brown (866) 730-4530

Partnership Package Chosen: _____

Company & Attendee Information:

Company Name _____

2020 Forecast Rep Name _____

Title _____

Address _____

City _____ State _____ ZIP _____

Phone Fax _____ Fax _____

Email _____

Web Site _____

Billing Information:

Contact Name _____

Title _____

Address _____

City _____ State _____ ZIP _____

Phone Fax _____ Fax _____

Email _____