

CONNECT WITH YOUR COMMUNITY AT THE PREMIER NETWORKING EVENT OF THE YEAR



CFA Society
Chicago

CFA SOCIETY CHICAGO 2017 ANNUAL DINNER

WEDNESDAY, NOVEMBER 1, 2017 • 5:00-9:00 P.M. • HYATT REGENCY CHICAGO

Please join CFA Society Chicago as we celebrate our Annual Dinner. This event is the premier networking event of the year, bringing together over 1,000 of Chicago's leading investment professionals and key decision-makers. Last year, more than 60 prominent firms supported their society member-employees and honored newly inducted charterholders by sponsoring the event and purchasing corporate tables.

Secure your spot by June 30th and receive one extra ticket to exclusive VIP Reception with Keynote Speaker

SPONSORSHIP LEVELS

(See next page for details)

Sponsorship Level	Premier \$15,000	Platinum \$10,000	Gold \$6,000	Silver \$4,000	Bronze \$2,500
Number Available	3	5	10	5	unlimited

Sponsorships sell out quickly, secure today: Sponsorship@CFACHicago.org / (312) 251-1301

THE HORTENSE FRIEDMAN, CFA, AWARD FOR EXCELLENCE RECIPIENTS:

LARRY LONIS, CFA

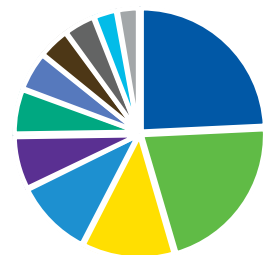
ROBERT HARPER, CFA (POSTHUMOUS)



KEYNOTE SPEAKER: DAVID M. RUBENSTEIN

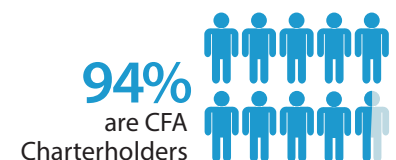
- Co-Founder and Co-CEO of The Carlyle Group
- Since being founded in 1987, Carlyle has grown into one of the world's largest private equity firms, managing \$158 billion from 35 offices around the world
- Served in various White House roles including Chief Counsel to the U.S. Senate Judiciary Committee's Subcommittee on Constitutional Amendments and Deputy Assistant to President Carter for Domestic Policy
- Magna cum laude graduate of Duke, where he was elected Phi Beta Kappa
- Graduate of the University of Chicago Law School, where he was an editor of *The Law Review*

REACH ELITE INVESTMENT PROFESSIONALS CFA SOCIETY CHICAGO MEMBERS

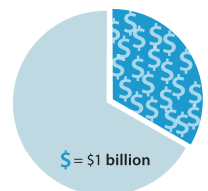


BY PROFESSION

- Portfolio Manager - 24%
- Research Analyst - 21%
- Other - 12%
- Consultant - 10%
- Chief-Level Executive - 7%
- Relationship Manager - 6%
- Financial Advisor - 5%
- Corporate Financial Analyst - 4%
- Risk Manager - 4%
- Strategist - 3%
- Manager of Managers - 3%



32%
manage
over
\$20 billion
in assets



SNAPSHOT OF SPONSORSHIP OPPORTUNITIES

Learn how you can 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 2016!

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 4,500+ 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	By Name	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	Enhanced	General
One year listing on CFA Society Chicago Website as a sponsor with logo and link (over 9,000 hits/month)	●	●	●	●	●
Listing as sponsor on CFA Society Chicago Blog (www.blog.CFACHicago.org)	●	●	●	●	●
Invitations to exclusive VIP Reception with Keynote Speaker (pay in full by June 30, 2017 and receive one extra ticket to exclusive VIP Reception with Keynote Speaker)	Five	Two	One	Two	One
Corporate name printed as a sponsor in Formal Invitation mailed to members and new CFA charterholders (must pay in full by August 25, 2017)	Enhanced	●	●	●	
Full or Half Page in Annual Dinner Program for sponsor recognition and non-advertising message (distributed to all attendees)	Full Page	Full Page	Half Page	Half Page	
Firm name/logo listed as a sponsor on Signage at Reception	●	●	●	●	
Five (5) Event Function Tickets to be applied towards eligible CFA Society Chicago programs (good through June 30, 2018)	●	●	●		
Additional Exclusive Placement in Annual Dinner Program highlighting firm name as a sponsor	Inside Cover	Back Cover			
Firm name included as a sponsor on Signage by Coat Check	●	●			
Prime Table Placement of corporate sponsored tables at Annual Dinner	In Front	Near Front			
Opportunity to provide Company Materials (near registration table)	●	●			
Firm name listed as sponsor on Cocktail Napkins	●				
Illuminated Logo Display as a sponsor in prominent area	●				
Firm name/logo listed as a sponsor on Promotional Item (TBD by CFA Society Chicago) (distributed to all attendees)	●				
Opportunity to secure company table near VIP Table at All Society Luncheon Programs (good through June 30, 2018)	●				

SPECIAL THANKS

TO OUR 2016 ANNUAL DINNER SPONSORSHIP LEADERS



CFA Society
Chicago

PREMIER



Invesco PowerShares
William Blair

PLATINUM



Convergex
J.P. Morgan
Northern Trust
Nuveen
Options Industry Council

GOLD



Calamos Investments
D'orazio Capital Partners
FitchRatings
Glenmede Investment Management
Harbor Capital Advisors
Legal & General Investment
Management America
PIMCO
Schwab Equity Ratings
Segall Bryant & Hamill
Thomas White International, Ltd.
UBS Asset Management

SILVER



AQR Capital Mgt.
BMO Global Asset Management
Deutsche Asset Management
Stifel
The HQ Companies, Inc.

BRONZE

Adams Street Partners, LLC
Alliance Bernstein
Allianz Global Investors
Allstate Investments
Aon Hewitt Investment Consulting, Inc.
Ariel Investments
Ashland Partners & Company, LLP
Atlantic Trust Private Wealth Management
Blaylock Beal Van, LLC
Cabrera Capital Markets
Channing Capital Management
Chicago Equity Partners
Columbia Threadneedle Investments
Columbia Wanger Asset Management
Duff & Phelps Investment Management Company
Evanston Capital Management, LLC
FactSet
Fidelity Investments
Heidrick & Struggles
Institutional Capital LLC (ICAP)
Jackson National Asset Management, LLC
Loop Capital
Manulife Asset Management
Marquette Associates, Inc.
Mesirow Financial
Morningstar
OFI Global Asset Management
Parametric
ProManage, LLC
Pavillion Advisory Group Inc.
Pioneer Investments
PPM America, Inc.
RBC Global Asset Management
Schroders
The Marco Consulting Group
The PrivateBank
The University of Chicago
Vanguard
WisdomTree Asset Management

SECURE YOUR SPOT TODAY!

For more information about
sponsoring this important event,
please contact CFA Society
Chicago at (312) 251-1301 or
Sponsorship@CFACHicago.org

For more information regarding
CFA Society Chicago's mission,
please visit www.CFACHicago.org

PAST ANNUAL DINNER SPONSORS

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Dovenmuehle
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eVestment
Goldman, Sachs & Co.
Grosvenor Capital Management, L.P.
Harris Associates
Houlihan Smith & Company, Inc.
IIT Stuart School of Business
Keeley Asset Management
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MSCI, Inc.
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New York Life MainStay Investments
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Performance Trust Investment Advisors
Perkins Investment Management
PNC Wealth Management
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Robert Half
University of Notre Dame Investment Office
U.S. Trust
Voya Investment Management
Wells Fargo Private Bank
Ziegler Capital Management