



CFA Society
Indianapolis



2023-2024

SPONSORSHIP OPPORTUNITIES

CFA SOCIETY OF INDIANAPOLIS

OVERVIEW

CFA Society Indianapolis is supported by partners like you who help offset the cost of delivering quality programming to our members. Your generous sponsorship allows CFA Society Indianapolis to offer events and continuing education to our 350, plus CFA Institute, local members and members of the local finance community. With your help we further our mission of promoting professional development, ethics, and awareness through outreach to and engagement with the financial community.

2023-2024 Programming

Event topic areas include the following:

Core Programming

Growing Your Investor Knowledge Series
Hoosier Hub Investor Series
Investing in Your Network Series

Student Focused Events

Research Challenge
Mock CFA Exams

Major Events

Investment Forum
Forecast Symposium
Annual Dinner (with Charterholders Ceremony)
Charity Golf Outing
Annual Meeting

About CFA Society Indianapolis

CFA Society Indianapolis is an association of local investment professionals organized in May of 1971. It promotes ethical and professional standards within the investment industry, encourages professional development through the CFA Program, and facilitates the open exchange of information and opinions. As one of the 138 CFA Institute member societies, our society connects members to a global network of investment professionals.

Our mission is to advance professional excellence and ethics through education, collaboration and awareness of the CFA charter for the benefit of our regional investment community and public.



Contacts

To secure any of these opportunities contact:

Ted Argus

Executive Director
executivedirector@cfasocietyindy.com

SUSTAINING SPONSORSHIP OPPORTUNITIES

PLATINUM SUSTAINING SPONSORSHIP

\$10,000 | 1 Available

Includes Complimentary Delegate Passes

The platinum sustaining sponsorship delivers the highest level of recognition throughout the year's marketing campaign and live program. As the platinum sustaining sponsor, your firm receives premium brand exposure during the year. Your firm will be recognized during live programs, in our Newsletter and email marketing, as well as featured on our website. Make an impression on members by projecting your firm's presence throughout the duration of the year.

- Exclusive Platinum Sustaining sponsor for CFA Society Indianapolis
- Company branding on all Newsletters to members and guest
- Company branding on annual Platinum Sustaining Sponsor banner
- Verbal recognition as Platinum Sustaining Sponsor at events
- 2 tickets to each of the CFA Society Indianapolis' core programming events
- 4 custom social media posts per year
- A branded table & 6 tickets to the Annual Forecast symposium

GOLD SUSTAINING SPONSORSHIP

\$5,000 | 2 Available

Includes Complimentary Delegate Passes

The gold sustaining sponsorship delivers the significant recognition throughout the year's marketing campaign and live program. As the gold sustaining sponsor, your firm receives premium-level recognition throughout the live programs, in our Newsletter and email marketing, as well as featured on our website. Make an impression on members by projecting your firm's presence throughout the duration of the year.

- One of two sustaining sponsorships offer by CFA Society Indianapolis
- Company branding on all emails to members and guest
- Company branding on annual sponsor banner at all events
- Verbal recognition as Sustaining Sponsor at events
- 1 ticket to each of the CFA Society Indianapolis' core programming events
- 2 custom social media posts per year

SILVER SUSTAINING SPONSORSHIP

\$2,000 | 3 Available

Includes Complimentary Delegate Passes

As the silver sustaining sponsor, your firm receives premium-level recognition throughout the live programs, in our Newsletter and email marketing, as well as featured on our website. Make an impression on members by projecting your firm's presence throughout the duration of the fiscal year.

GROWING YOUR INVESTOR KNOWLEDGE SERIES



SPONSORSHIP OPPORTUNITIES

\$3,000/event | 3 Available OR **\$7,500 for all three** | 1 Available

This series of events is the most core to our society covering all variations of investing related topics.

- Opportunity to get in front of 50-100 members and guests
- Opportunity to setup table/booth at event and speak briefly at event
- Company branding on Investment Management Series emails, event social media postings, and individual event banner
- Opportunity to put company content in follow-up email post event to attendees
- Table with 8 free tickets to your sponsored event
- Potential opportunity to bring a event speaker from your organization to speak at event
- 1 custom social media post per year

HOOSIER HUB INVESTOR SERIES



SPONSORSHIP OPPORTUNITIES

\$3,000/event | 3 Available OR **\$7,500 for all three** | 1 Available

The Hoosier Hub Investor Series is a new event series put on by CFA Society Indianapolis to highlight and dissect local investment related news and stories happening across the state of Indiana, whether it be private or public markets. The mission of this new event series is to cultivate greater investor collaboration and investment across the state of Indiana to build a more prosperous tomorrow.

- Opportunity to get in front of 75-125 members and guests
- Opportunity to setup table/booth at event and speak briefly at event
- Branding on all Investing in Indiana Series event emails, event social media postings, and individual event banner
- Opportunity to put company content in follow-up email post event to attendees
- Table with 8 free tickets to your sponsored event

INVESTING IN YOUR NETWORK SERIES



SPONSORSHIP OPPORTUNITIES

\$3,000/event | 3 Available OR **\$7,500 for all three** | 1 Available

This series of events is focused on giving our members an opportunity to network with fellow members and guests in a fun and enjoyable environment. We typically try to find unique venues such as sporting events, Top Golf, roof top bars to host these events at. These events may also have a speaker/panel if the location permits an opportunity to do so.

- Opportunity to get in front of 50-100 members and guests
- Opportunity to setup table/booth at event and speak briefly at event
- Company branding on Investing in Your Network Series event emails, event social media postings, and individual event banner
- Opportunity to put company content in follow-up email post event to attendees
- 8 free tickets to your sponsored event
- Potential opportunity to bring an event speaker from your organization to speak at event
- 1 custom social media posts per year

ANNUAL INVESTMENT FORUM

MAY, 2024 | INDIANAPOLIS MOTOR SPEEDWAY



Our investment forum is our biggest event we put on. This is typically a 5-6 hour event with several speakers and panels throughout the event. Our next investment forum will be hosted at Indianapolis Motor Speedway during the month of May 2023. Past speakers include Howard Marks, David Rubenstein, Tom Lee, Michael Mauboussin, Carson Block and many other high profile investors.

PLATINUM EVENT SPONSORSHIP

\$15,000 | 1 Available

16 Complimentary Delegate Passes

The platinum event sponsorship delivers the highest level of recognition throughout the Annual Investment Forum. As the platinum sponsor, your firm receives an introduction at the beginning of the event with the opportunity to speak to the audience for 3-5 minutes. Your firm will be featured on the event banner. Make an impression on networking attendees as they network and project your firm's presence throughout the duration of the event. Other features include:

- Opportunity to get in front of 250+ members and guests
- Opportunity to setup table/booth at event
- Event sponsor works with us to choose a speaker and topic for one of the event presentations
- Branding on all Annual Investment Forum event emails, event social media postings, and individual event banner
- Branding coverage in event recap video
- Opportunity to put company content in follow-up email post event to attendees
- 2 Front tables with 16 total seats and table signage included
- 1 custom social media posts per year

TABLE SPONSORSHIP

\$2,000 | 10 Available

8 Complimentary Delegate Passes

Forward table with 8 total seats and table signage included



ANNUAL FORECAST SYMPOSIUM

JANUARY, 2024 | BANKER'S LIFE FIELD HOUSE



Our Forecast Symposium is our newest major event but has quickly become a crowd favorite. We host our annual forecasting event at Bankers Life Fieldhouse before a Pacers game where we have a panel of speakers discuss their views on how the markets will move in the coming year. We then transition to the all-inclusive area of the fieldhouse to network and watch the Pacer beat their opponent. In 2019, we had over 115 attendees for the inaugural upsized event. We are looking to host this event in late January or early February 20223 and expect to have well over 150 attendees.

PLATINUM EVENT SPONSORSHIP

\$10,000 | 1 Available

8 Complimentary Delegate Passes

The platinum event sponsorship delivers the highest level of recognition throughout the Annual Forecast Symposium. As the platinum sponsor, your firm receives an introduction at the beginning of the event with the opportunity to speak to the audience for 3-5 minutes. Your firm will be featured on the event banner. Make an impression on networking attendees as they network and project your firm's presence throughout the duration of the event. Other features include:

- Opportunity to get in front of 150+ members and guests
- Opportunity to setup table/booth at event
- Branding on all Annual Forecast Symposium event emails, event social media postings, and individual event banner
- Opportunity to put company content in follow-up email post event to attendees
- Branding coverage in event recap video
- 1 Front table with 8 total seats and table signage included
- Potential opportunity to bring speaker to sit on panel or do presentation before panel
- 1 custom social media posts per year

TABLE SPONSORSHIP

\$1,500 | 5 Available

8 Complimentary Delegate Passes

Forward table with 8 total seats and table signage included

[WATCH THE RECAP](#)



CHARITY GOLF OUTING

SEPTEMBER 21, 2023 | THE SAGAMORE CLUB



Join us for a full day of networking, education, and fun all through a day focused on giving back to the local community. The day will kickoff off with a breakfast speaker presentation and then hit the links for a great day out on the beautiful Sagamore Club golf course.

PRESENTING EVENT SPONSORSHIP

\$5,000 | 1 Available

4 Delegate Passes

The presenting event sponsorship delivers the highest level of recognition throughout the Charity Golf Outing. As the presenting sponsor, your firm receives an approved speaker for the breakfast portion of the event. Your firm will receive four tickets to the event and a branded table of 4. Your firm will also be featured on the event banner. Make an impression on networking attendees as they network and project your firm's presence throughout the duration of the event. Other features include:

- Opportunity to get in front of 100+ members and guests
- Opportunity to setup table/booth at event
- Event sponsor works with us to choose a speaker and topic (can be someone from your organization)
- Company branding on all event emails, event social media postings, and individual event banner
- Branding coverage in event recap video
- Opportunity to put company content in follow-up email post event to attendees
- 1 free foursome included in sponsorship
- 1 free hole sponsorship
- 1 custom social media posts per year
- Branded table for 4



CHARITY GOLF OUTING

SEPTEMBER 21, 2023 | THE SAGAMORE CLUB

BEVERAGE CART SPONSORSHIP

\$3,000 | 2 Available

4 Delegate Passes

The beverage cart sponsorship delivers significant recognition throughout the Charity Golf Outing. Your firm will receive four tickets to the event and two branded beverage carts. Your firm will also be featured on the event pop-up banner at the event. Make an impression on networking attendees as they network and project your firm's presence throughout the duration of the event.

SINGLE HOLE + FOURSOME SPONSORSHIP

\$1,400 | 8 Available

4 Delegate Passes

The single hole + foursome sponsorship delivers significant recognition throughout the Charity Golf Outing. This opportunity includes four tickets to the event and a branded hole on the course (society will cover yard signage cost). Your firm will also be able to set up a booth at your designated hole. Feel free to bring promotional items and make an impression on attendees as they network and project your firm's presence throughout the duration of the event.

SINGLE HOLE SPONSORSHIP

\$1,000 | 4 Available

4 Delegate Passes

The single hole sponsorship delivers significant recognition throughout the Charity Golf Outing. This opportunity includes a branded hole on the course (society will cover yard signage cost). Your firm will also be able to set up a booth at your designated hole. Feel free to bring promotional items and make an impression on attendees as they network and project your firm's presence throughout the duration of the event.



ANNUAL DINNER (W/ CHARTERHOLDERS CEREMONY)

DATE | LOCATION



Our annual dinner is our classiest event where we honor the newest class of CFA charterholders while enjoying a 3 course meal. Our guests typically bring their significant others, which makes for a very enjoyable event for attendees. We will be adding a presentation portion to the event where we highlight a top of mind investing topic. We will be looking to host this event at the Skyline Club, overlooking the city, in November 2022.

PLATINUM EVENT SPONSORSHIP

\$5,000 | 1 Available

8 Complimentary Delegate Passes

The platinum event sponsorship delivers the highest level of recognition throughout the Annual Dinner. As the platinum sponsor, your firm receives an introduction at the beginning of the event with the opportunity to speak to the audience for 3-5 minutes. Your firm will be featured on the event banner. Make an impression on networking attendees as they network and project your firm's presence throughout the duration of the event. Other features include:

- Opportunity to get in front of 125+ members and guests
- Opportunity to setup table/booth at event
- Branding on all Annual Charterholder Ceremony event emails, event social media postings, and individual event banner
- Opportunity to put company content in follow-up email post event to attendees
- 1 Front table with 8 total seats and table signage included
- Potential opportunity to bring speaker to do presentation
- 1 custom social media posts per year

TABLE SPONSORSHIP

\$1,000 | 5 Available

8 Complimentary Delegate Passes

Forward table with 8 total seats and table signage included

ANNUAL MEETING

DATE | LOCATION



Our annual meeting is a members exclusive event where we review what was accomplished in the previous year and then have open discussions with guests to discuss opportunities for the year ahead. This event typically brings out our most established members from the local investment community. For our next annual meeting, we will be hosting our event at the Indianapolis Children's Museum in June 2022. The event will be located in the Sports Experience part of the museum where we will be renting out both 18 hole Pete Dye designed putt-putt courses for our post-meeting networking environment. We expect this event to bring out 100-125 attendees as significant others will be invited as well.

PLATINUM EVENT SPONSORSHIP

\$5,000 | 1 Available

2 Complimentary Delegate Passes*

The platinum event sponsorship delivers the highest level of recognition throughout the Annual Meeting. As the platinum sponsor, your firm receives an introduction at the beginning of the event with the opportunity to speak to the audience for 3-5 minutes. Your firm will be featured on the event banner. Make an impression on networking attendees as they network and project your firm's presence throughout the duration of the event. Other features include:

- Opportunity to get in front of 100+ members and guests
- Opportunity to setup table/booth at event
- Company branding on all Annual Meeting event emails, event social media postings, and individual event banner
- Opportunity to put company content in follow-up email post event to attendees
- 1 Front table with 8 total seats and table signage included
- 1 custom social media posts per yea

TABLE SPONSORSHIP

\$750 | 5 Available

8 Complimentary Delegate Passes

Forward table with 8 total seats and table signage included

*Complimentary Delegate Passes are for Company Representatives only

RESEARCH CHALLENGE

DATE | LOCATION



Our Research Challenge event brings college students from all over the state to compete against each other on a case study where they argue their case for a fair valuation for a chosen company. This event serves as a fun networking environment where we serve appetizers and beverages. We typically have 20-30 competitors with total attendance between 50-100 attendees.

PLATINUM EVENT SPONSORSHIP

\$3,000 | 1 Available

The platinum event sponsorship delivers the highest level of recognition throughout the Research Challenge. As the platinum sponsor, your firm receives an introduction at the beginning of the event with the opportunity to speak to the audience for 3-5 minutes. Your firm will be featured on the event banner. Make an impression on networking attendees as they network and project your firm's presence throughout the duration of the event. Other features include:

- Opportunity to get in front of 50-100 attendees
- Opportunity to setup table/booth at event and speak briefly at event
- Branding on all Research Challenge event emails, event social media postings, and individual event banner
- Opportunity to put company content in follow-up email post event to attendees
- Table with 8 free tickets to your sponsored event
- 1 custom social media posts per year



MOCK CFA EXAMS

Our Mock CFA exam events are put on twice per year to prepare test takers for a practice environment setup that looks to recreate the real thing. We typically have 20-30 CFA candidates sign up to attend these events.

PLATINUM EVENT SPONSORSHIP

\$5,000 | 1 Available

2 Complimentary Delegate Passes*

The platinum event sponsorship delivers the highest level of recognition throughout the Annual Meeting. As the platinum sponsor, your firm receives an introduction at the beginning of the event with the opportunity to speak to the audience for 3-5 minutes. Your firm will be featured on the event banner. Make an impression on networking attendees as they network and project your firm's presence throughout the duration of the event. Other features include:

- Opportunity to get in front of 100+ members and guests
- Opportunity to setup table/booth at event
- Company branding on all Annual Meeting event emails, event social media postings, and individual event banner
- Opportunity to put company content in follow-up email post event to attendees
- 1 Front table with 8 total seats and table signage included
- 1 custom social media posts per year



Contacts

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