



The CFA Society of Austin

Setting a Higher Standard for the Austin Investment Community

2017/2018 Sponsorship Opportunities

CFA Society Austin (CFASA) appreciates our sponsors. Your support assists us in our on-going effort to provide high quality education and other programming to our members and the investment community.

Our sponsors benefit by helping the investment community and by the marketing efforts we enlist to our 1,600 plus mailing list, including our over 400 members and at our lunches, networking, and special events (like the Annual Dinner). It will also help identify your Company as one that understands the need to support the highest standards in the financial services industry by endorsing a professional investment organization such CFASA.

We have created multiple sponsorship opportunities to find one that fits your needs and goals. Our biggest event, the Annual Dinner is a unique opportunity for Austin and other Texas investment professionals to gather and discuss their thoughts on the economy and financial markets.

We hope your company will support us by becoming a sponsor.

We thank you for your support.

2016/2017 Diamond Sponsors



STATE STREET

McVEAN
TRADING & INVESTMENTS, LLC



For additional information on the CFA Society Austin, CFA designation or any other questions, please contact admin@cfaaustin.org.

Why the CFA Designation Matters

The CFA Program is a globally recognized, graduate level curriculum that provides a strong foundation of real-world investment analysis and portfolio management skills along with the practical knowledge needed in today’s investment industry. A CFA designation after your name assures your clients you are highly knowledgeable in investment decision-making and financial analysis. Having employees with the CFA designation means your firm is dedicated to hiring and training individuals with the highest standards for ethical practices and overall professional excellence.

The CFA Program

To secure the CFA designation, an investment professional must complete a three-year study program and pass three levels of examination. Each exam is six hours long and offered only once or twice per year. Additional requirements include a minimum of four years of experience in the investment industry and adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

About CFA Society of Austin (CFASA)

The CFA Society of Austin is a non-profit, professional organization with over 400 members. It was founded in 1963 to serve the practitioner's need for specialized knowledge, advanced studies, and information on new developments in investments and financial management. Of

equal importance has been its mission to promote high ethical and professional standards among its members.

The Society is a member of the CFA Institute, formerly known as the Association of Investment Management and Research (AIMR). The Austin Society was admitted to membership in 1966 as part of the Austin-San Antonio Society and then in 1985 as the Austin Society. In 2005, the Austin Society underwent a name change from the Austin Society of Financial Analysts, Inc. (ASFA) to the current name, CFA Society Austin.

Mission

CFA Society of Austin’s mission is “To lead the Austin investment community by delivering unique, high quality education and networking opportunities supporting the highest ethical and professional standards for the ultimate benefit of our membership.”

Top 6 Employers of CFASA Members

- Teachers Retirement System of Texas
- Dimensional Fund Advisors LP
- Employees Retirement System of Texas
- Sage Advisory Services, Ltd. Co.
- Wells Fargo
- UT Investment Management Co., Inc.

CFASA Membership Information

- Active Members 396
- CFA Charterholders 95%
- Over 15 Years of Experience 57%

Membership Data as of June 30, 2015

**REPRESENTATIVE FIRM LIST
As of November 1, 2016**

Wealth Management

Abacus & Scout, LLC
 Atlantic Trust
 Austin Trust Company Inc.
 Austin Wealth Management
 Avondale Wealth Management LLC
 Bell Wealth Management
 Blackhaw Wealth Management
 Briaud Financial Planning
 Castle Hill Advisors, LLC
 Century Management
 Cinque Partners
 Covenant Multi Family Office LLC
 Cypress Point Wealth Management
 Deutsche Asset & Wealth Mgmt.
 Durbin Bennett Peterson LLP
 DWP Investment Management
 Equistar Wealth Management
 Goshawk Global Investors
 Haven Financial Advisors
 Hawkins Family Partners, LP
 Meritage Capital, LLC
 Nfp Securities, Inc.
 Northern Trust Corporation
 Per Stirling Capital Management, LLC
 Richard P Slaughter Associates
 Robert Harrell Inc.
 Salem Partners LLC
 South Texas Money Management
 SWBC Investment Advisory Services
 Terry McDaniel & Company
 Yorkmont Capital Management

Financing/Leasing services

Ibex Leasing Company

Insurance firms

National Western Life Insurance Co.
 TIAA-CREF

Real Estate

Callegro Investments
 Gossett Jones Homes
 Homeaway
 Tover Capital Group LLC
 Virtus Real Estate Capital

Asset Management

Afam Capital
 Aim Investments
 AllianceBernstein
 Alpha Capital Management
 Aquitania Capital Management
 Barden Capital Management
 Bares Capital Management
 Cantor Fitzgerald & Co Inc.
 Contravest Inc.
 Denham Capital Management LP
 Dimensional Fund Advisors LP
 EF Capital Management, LLC
 Empiric Advisors Inc.
 First Southwest Company
 GlobalMax Capital Advisors LLC
 Guardian Capital Group Limited
 Hoisington Investment
 Invesco/AIM
 King Investment Advisors Inc.
 Lafitte Capital Management LP
 Luther King Capital Mgmt. Corp.
 Meritage Capital, L.P.
 Murray & Co Asset Management Ltd
 Perella Weinberg Partners LP
 Sage Advisory Services
 Samco Capital Markets, Inc.
 Schroder Investment Management
 Steven Ayers & Co
 Teton Capital Partners LP
 Third Coast Capital Management LP
 Waychee Capital Management, LLC
 Windhaven Investment Management
 Wise Holdings

Consulting

Akros Fiduciary Management
 Alex Sheshunoff & Co.
 Alliance Partners
 Bancvue
 Castle Currency Management
 Deloitte Consulting LLP
 Factset Research Systems Inc.
 Fincap, Inc.
 Maxwell Locke & Ritter
 Pricewaterhouse Coopers
 RJ Falkner & Company, Inc.

Public Pension/Investment Funds

Austin Energy
 County of Travis
 Employees Retirement System of Texas
 Municipal Retirement System, Texas
 Teacher Retirement System of Texas
 Texas County & District Retirement System
 Texas Education Agency
 Texas Permanent School Fund
 Texas Treasury Safekeeping Trust Company

Not-for-Profits

Rgk Foundation Inc.
 Seton Healthcare
 University of Texas at Austin
 University of Texas Investment Mgmt Co.

Retail/Investment Banks & Affiliates

Bank of America
 Citizens National Bank
 Farm Credit Bank of Texas
 Frost National Bank & Investment Advisors
 JP Morgan
 RBC Capital
 Regions Bank
 US Trust
 Wells Fargo

Retail Brokerage Firms

Charles Schwab
 Raymond James

Non-Financial Corporations

BMC Software
 Dell
 Federal Deposit Insurance Corporation
 Financial Valuation Services, LC
 Fitch Ratings
 Freescale Semiconductor
 Microsoft
 Morningstar
 Municipal Market Analytics
 The Motley Fool Inc.
 Thomson Reuters Corporation
 Whole Foods Market

CFA SOCIETY OF AUSTIN (CFASA) ANNUAL EVENT DETAILS

Annual Dinner (1st Quarter)

The Annual Dinner is CFA Society of Austin's (CFASA) premier event featuring world-class speakers sharing timely information with members. This elegant cocktail reception and dinner event brings together more than 200 members of our society, other Texas CFA society members and local leaders for networking, the sharing of ideas and newsworthy topics.

Charter Award Ceremony (4th Quarter)

Charter Award Ceremony is one of CFASA's more popular events where members gather to socialize and share stories of the past year. The Luncheon includes the awarding of new charters to this year's CFA charter holder recipients.

Monthly Education Programs – Individual Sponsorship Opportunities Available

CFASA is committed to providing professional development opportunities to our members through an average of 8-12 breakfasts, luncheons or dinners each year featuring top quality speakers and industry professionals from around the world. These events attract anywhere between 40 to 100 members and guests and are a great opportunity for networking and idea sharing.

Past Luncheon Speakers Have Included:

- Dr. James Kee, PhD, South Texas Money Mgmt.
- Directors from SEC and FINRA
- Keith Phillips, PhD - Federal Reserve Bank
- Dan Fuss – Loomis, Sayles & Company
- Jeffrey J. Sherman, CFA, DoubleLine
- Dr. Dan Ariely, Author
- Pat Dorsey, Morningstar
- Jeff Mathews, Author & Portfolio Manager
- Don Chance, Professor at LSU
- Amy Laskey, Fitch Ratings
- Ed Ware/Tim Edwards, Barclays Capital
- Dr. David Kelly, JP Morgan Funds
- Edward P. Keating, Lazard Asset Management
- Tobias Levkovich, Citigroup
- Dan Pickering, Tudor, Pickering, Holt & Co

Student Events and Networking Opportunities

Future events still to be scheduled for the coming year may include networking opportunities associated with a Career Expo, Global Investment Research Challenge, Schweser CFA Review Program, Wine tasting, and other networking events.



	<i>Year Round Sponsorship</i>	<i>Annual Dinner Sponsorship February 23, 2017</i>		
2017 Sponsorships Benefits	Diamond	Gold	Silver	Table
Sponsorship Cost*	\$ 5,500	\$ 2,800	\$ 1,750	\$ 1,400
Dinner Tickets	8	8	8	8
Front Stage Signage	★			
Recognition In Promotional Material	★	★	★	
Recognition In Invitation	★	★		
Recognition On Annual Dinner Webpage	★	★	★	★
Recognition From Podium	★	★		
Signage At Check-In Table	★	★	★	
Sponsorship Logo/Name	Large	Medium	Small	Name
Firm Name or Logo Printed On Cocktail Napkins	★			
VIP Seating Area	★	★		
Preferred Table Location			★	★
Guaranteed Seating Together	★	★	★	★
Opportunity To Provide Company Materials And/Or Company-Sponsored Give-Away Bags (Distributed To All Dinner Attendees)	★	★		
Opportunity To Sponsor A Drawing Giveaway At Annual Dinner Event	★	★		
Signage On Dinner Table	★	★	★	★
Right Of First Refusal To Be 2018 CFA Austin Annual Dinner Sponsor (Price Subject To Change; Deadline To Commit Is 11/30/17)	★	★	★	
Additional Individual Seats (No Guarantee of Preferred Seating or Sitting Together)	Member Price	20% Off Non-Member	10% Off Non-Member	
Until Next Year's (2018) Annual Dinner				
Corporate Sponsorship Recognition:				
CFA Home Page (Including Logo And Link)	★			
Monthly Newsletters (over 1,600 on list)	★			
Monthly Lunches And Other Events	★			
Monthly Lunch Tickets	2			
Listed On PowerPoint At Beginning Of Events	★			
Introduce Approved Lunch Speaker	1			
Featured Sponsor In Newsletter	1			

*Pricing subject to change.



******Sponsorship Deadline February 1, 2017******

Name _____

Company _____

Address _____

Phone _____

Email _____

Sponsorships*:

Society Sponsorship:

\$5,500 Diamond

Annual Dinner Sponsorship - February 23, 2017 – Four Seasons Downtown Austin

\$2,800 Gold

\$1,750 Silver

Annual Dinner Table Purchases

\$1,400 Table for 8 (indicate number of tables ____)

**Pricing subject to change.*

Means of Payment

Check - Payable to:

CFA Society of Austin, 3267 Bee Cave Rd, Suite 107-273, Austin, TX 78746

Credit Card (Visa / MasterCard / Discover / American Express)

We will contact you regarding a payment link or to process over the phone.

Payment Contact Person (if different from above)

Name _____

Phone _____

Email _____

Please email any questions or requests for additional information, on sponsorships to Sponsorship@cfaaustin.org.



**2017 ANNUAL DINNER SPONSOR/TABLE PURCHASE
REGISTRATION FORM (Cont'd)**

Please print your name as you wish to be recognized:

Name _____

Company _____

Kindly email your logo to Sponsorship@cfaaustin.org for inclusion in printed materials.

Guest Names: Please print clearly. Guest names can be provided at a later date. However, please provide names by **Friday, February 3, 2017**.

	Name	Email Address
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____
8.	_____	_____

NOTE: *All sponsorships come with eight dinner tickets.*