



## **Sponsor Benefit Sheet and Agreement 2010-2011 Fiscal Year**

### **CFA INSTITUTE, CFA SOCIETY OF DALLAS / FORT WORTH**

The CFA Institute (CFI), [www.cfainstitute.org](http://www.cfainstitute.org), is a global, not-for-profit membership organization that awards the CFA<sup>R</sup> (CFA<sup>R</sup>) designation. CFI leads the investment industry by setting the highest standards of ethics and professional excellence and vigorously advocating fair and transparent capital markets. CFI offers a range of educational opportunities around the world. The CFA program is a graduate-level, self-study curriculum and examination program for investment specialists, particularly securities analysts, money managers, and investment advisers. The CFA program sets the global standard for investment knowledge, standards and ethics.

The mission of CFA Institute is to lead the investment profession globally by setting the highest standards of ethics, education, and professional excellence.

Currently, CFI has 135 societies with 93,528 members from 132 Countries.

The CFA Society of Dallas Fort Worth (CFA/DFW) is the local society of CFA members in the North Texas area. CFA/DFW / its predecessor organization was founded in 1951 as an organization of investment professionals to provide interchange among investment managers; promote good fellowship among those whose primary occupation was investment analysis; improve analytical procedures and techniques; promote a broader understanding of the investment management profession; and encourage and support the CFA professional accreditation. Of equal importance has been CFA/DFW's mission to promote high standards of professional conduct among its members. For more than 50 years, these objectives have guided the society and its members, and CFA / DFW now plays a vital role within the North Texas investment community. CFA/DFW has more than 1,000 members. It is among the largest of the member societies and affiliates of CFI, and its members serve as leaders of CFI. Our membership is associated with a wide variety of industries associated with various aspects of finance. Our top four concentrations representing over 10% of our membership in each are Private Client Wealth, Institutional Investments, Mix of Private and Institutional Investments and Consultancy.

### **SPONSORSHIP OPPORTUNITIES**

CFA/DFW has a unique opportunity to serve those working in the investment profession in our region by providing leading-edge educational and networking opportunities. Members have the opportunity to stay current with the changing world of investments.

Because of its unique position and focus, CFA/DFW has attracted a prestigious group of organizations and individuals that share its goals and want to support its efforts. A number of companies have demonstrated a commitment to excellence and high standards by sponsoring the CFA Society of Dallas / Fort Worth in various ways.

We are now offering three additional levels of sponsorship, Program (Maximum of 3 Available), Event and Chapter Gold. These sponsorship opportunities are limited in number and exclusive, and are available to those within the financial, business and investment communities.

**Sponsorships commence *annually* and run from September 1st to June 30th each year; partial year sponsorships are not available at this time.**

- Due to stated maximum numbers of sponsorships at each level, certain sponsorship opportunities may not be available.
- Sponsorships will be made on a first-come first-served basis.
- Chapter Gold or Program Sponsorships will not be pro-rated to reflect participation for a shorter time frame.

*Contact Information:* Please contact Margaret Jackson 214-363-3284 for additional details regarding sponsorship opportunities.