



CFA Society
Miami

*A program
that grows
with you*



About us

CFA Society Miami (CFAM) is a member society of CFA Institute, a global membership organization that awards the Chartered Financial Analyst designation and strives to lead the investment profession globally by setting the highest standards of ethics, education and professional excellence. CFAM is a non-profit organization founded in 1991. It was initially established as the Miami Society of Financial Analysts and was renamed CFA Miami in 2004. CFAM serves as the knowledge core for the local investment community by promoting active participation among its members and sponsoring a forum of speaking engagements on timely and relevant topics spanning accounting, derivatives, economics, ethics, fixed income and equity markets, and securities.

Mission

The mission of CFA Institute is served by generating value for investment management professionals and engaging with the investment industry to advance ethics, market integrity, and professional standards of practice, which collectively contributes value to society.

Vision

Empowering the investment industry to realize the world's greatest possibilities.

Values



Investment professionals contribute to the ultimate benefit of society through the sustainable value.



Financial markets are more effective with knowledgeable, diverse participants



Good stewardship and high ethical standards are necessary for trust and confidence to be secured and for society to be served.



High ethical principles and professional standards.

CFA Society Miami Members

Total Members: 606

Affiliate: 4

Retired: 23

Regular: 579

Member Occupations

1. Asset Management/Investment Firm - 210
2. Private Wealth Management- 127
3. Consulting- 35
4. Brokerage- 31
5. Commercial Bank - 25
6. Investment bank — 17
7. Information Technology- 13
8. Other Financial Professions- 50



CFA® Institute

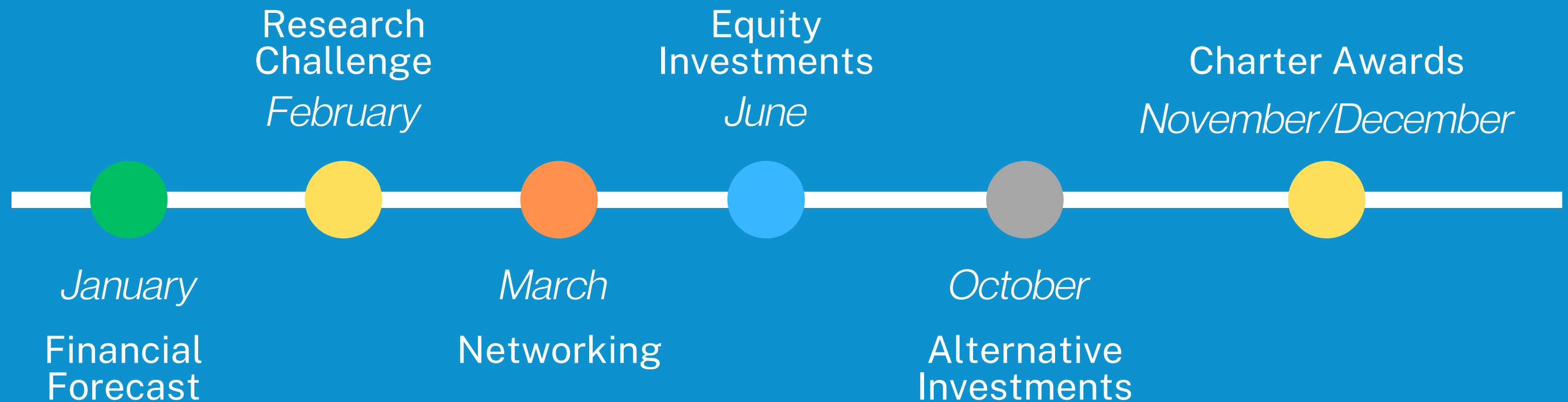
In an industry that struggles to define itself, the institutions and individuals that CFA Institute serve stand for building a better world for investors.



Scan the QR code to learn more

Signature Events

Build your credibility by partnering with the premiere organization for investment professionals in Miami. Our signature events are historically held in the following months but subject to change.



SPONSORSHIP LEVELS

	Platinum	Gold	Silver	Bronze
	\$10,000	\$7,500	\$5,000	\$3,000
Website	Logo & link	Logo & link	Logo & link	Logo & link
Promotional/ Event Invites	Logo at all events and invites	Logo on all invites	Logo for sponsored event only	Logo for sponsored event
Booth/ Video at Event	All events	3 events	2 events	1 event
# Seats at Sponsored Event	5	4	3	2
Job Board Postings	12 months	6 months	90 days	30 days
Speakers at Sponsored Events	Y	Y	N	N

Past Sponsors

2020

Starwood
Vanguard
Wiley

2022

Invesco

2023

First Trust
Harding Loevner
StoneX



Annual Sponsorships

To secure a sponsorship opportunity and gain access to CFA Society Miami finance and investment professionals, please contact Lloyd Macedo, Director, CFA® Society Miami.



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