

# CFA UK SPONSORSHIP OPPORTUNITIES 2025

CFA SOCIETY  
UNITED  
KINGDOM

---

WE  
GROW  
TALENT

# INTRODUCTION



CFA UK brings together more than 12,000 investment management and financial decision-makers in the UK, the majority of whom are CFA Charterholders working in the profession.



We are proud to offer our partners the opportunity to increase their visibility and impact with our influential membership.



Our sponsorship programme offers access to the most valuable and highly qualified group of investment professionals in the UK, and the opportunity to align themselves with UK's leading investment professional body.



Our dedicated team will work with you to customise an integrated and targeted sponsorship programme to maximise your ROI – ensuring your proposition gets in front of our membership with the greatest impact.

CFA SOCIETY  
UNITED  
KINGDOM

WE  
GROW  
TALENT

# WHO WE ARE



**12180**

Investment  
Professional members

**10134**

CFA Charterholders

**3780**

CFA UK IMC  
Candidates

**450**

Volunteers

**391**

CFA UK Certificate in  
Climate & Investing  
candidates

**524**

CFA UK Certificate in  
Impact Investing  
candidates

**10**

members on the  
Board of Directors

**50**

volunteer groups  
and communities

# MEMBER PROFILE

CFA SOCIETY  
UNITED  
KINGDOM

WE  
GROW  
TALENT

- Average CFA UK member age: 40
- Average years in the investment industry: 14
- Gender ratio: 21.5% female, 78.5% male

## Key employer types:

- Investment Management Firm (39%)
- Investment Bank (16%)
- Investment consulting firm (8%)
- Commercial Bank (5%)
- Asset owner (5%)
- Private Bank (4%)
- Insurance Company (3%)
- Other (20%)

## Key occupation types:

- Portfolio Manager (26%)
- Research Analyst (18%)
- Consultant (6%)
- Relationship Manager (5%)
- Chief Executive (4%)
- Other (36%)





# CFA UK Sponsorship Opportunities

# FLAGSHIP SPONSORSHIP OPPORTUNITIES



INVESTMENT TALENT CONFERENCE



CFA UK SOCIETY SPONSORSHIP



ANNUAL FORECASTING 2025



CFA UK SUSTAINABILITY COMMUNITY



CFA UK TECHNOLOGY AND  
INNOVATION COMMUNITY



# SOCIETY SPONSORSHIP

CFA UK's Society Sponsorship provides firms a unique opportunity to build relationships and affiliate with CFA UK throughout the year, gaining consistent visibility and engagement within the investment industry. This partnership places sponsors at the heart of CFA UK's events and activities, enabling brand positioning within a highly targeted and professional audience.

## Audience

**Profile:** Investment industry professionals (12,000+ Members and Non-members)



# SOCIETY SPONSORSHIP

	CFA UK Society Sponsorship
Sponsorship Package	£30,000 + VAT
Promotion Period	12 Months
Networking	<ul style="list-style-type: none"> <li>• 3 x guest passes for CFA UK Annual Conference in June 2025</li> <li>• 2 x guest passes for CFA UK Annual Forecasting Event</li> <li>• 3 x guest passes for Summer and Winter Receptions</li> <li>• A dedicated speaker/moderator slot at one CFA UK event</li> <li>• Exhibition stand space (3m x 2m including one dressed table) at major events throughout the year (Annual Conference, Annual Forecasting Event, Summer &amp; Winter Receptions)</li> <li>• 2 x CFA UK Annual Memberships</li> </ul>
Content	<ul style="list-style-type: none"> <li>• 1 Live Webinar ( Recording available on CFA UK Professional Learning Platform )</li> <li>• Senior Executive to participate in CFA UK Podcast "In Conversation" (theme to be agreed in advance).</li> </ul>
Branding and Promotion	<ul style="list-style-type: none"> <li>• Branding at major events throughout the year (Annual Conference, Summer &amp; Winter Receptions)</li> <li>• Logo and profile on CFA UK's sponsorship web page</li> <li>• Promotion in CFA UK's newsletters and on social media</li> </ul>



# INVESTMENT TALENT CONFERENCE

**Investment Talent Conference**, a one-day event focused on developing the skills and insights that will shape the future of the investment industry. This skills-based careers conference is a unique and valuable opportunity to raise awareness of your products and services to a relevant and engaged audience of early to mid-career professionals.

The conference is structured around three key themes that reflect the most pressing and innovative topics in investment today:

- 1. Artificial Intelligence (AI):** Exploring the future of AI in investment, including portfolio optimisation, AI valuations, and assessing the impact of AI tools on investment strategies.
- 2. Machine Learning & Data:** Focusing on data-driven decision-making through Machine Learning, with discussions on LLM, and practical AI applications such as prompt engineering.
- 3. Sustainability:** Examining the role of sustainability in the investment landscape, from impact investing and transition plans to sovereign sustainability.

Each stream will feature expert panels, breakout sessions, and practical discussions to navigate skills needed in the rapidly changing investment environment.



ARTIFICIAL  
INTELLIGENCE

MACHINE  
LEARNING AND  
DATA

SUSTAINABILITY

**Average number of attendees: 300**

**Attendee Profile:** senior investment professionals, key decision makers and influencers.

1 x Title Sponsorship £50k+VAT 3 x Thematic Sponsorship £30k + VAT	1 x Reception Sponsor £15,000 + VAT	4 x Exhibitors' Sponsorship £6,500 + VAT
Banner stand at registration with event branding and your logo	Banner stand at Drinks Reception with Event Branding and your logo	Your logo on the conference web page
Your logo and company profile on the conference web page and logo on conference email promotions	Your logo and company profile on the conference web page	1 delegate place at the event
6 delegate places at the event (Title) 4 delegate places at the event (Thematic)	2 delegate places at the event	Exhibition stand space (3m x 2m including one table)
Exhibition stand space (3m x 2m including one dressed table)	Exhibition stand space (3m x 2m including one dressed table)	Opportunity to run a 'business card drop' competition.
Holding slide with event branding and your logo shown on screen in room	Opportunity to run a 'business card drop' competition.	Anonymised attendee data
Opportunity to run a 'business card drop' competition.	Short message to attendees included in post event email with opt-in	
Short message to attendees included in post event email with opt-in	Opportunity to host post-event webinar	
Opportunity to host post-event webinar	Opt-in text on conference webpage	
Opt-in text on the conference webpage and anonymised attendee data	Anonymised attendee data	

Exhibition space will also be used for lunch and all refreshment breaks giving exhibitors strong footfall during these times.

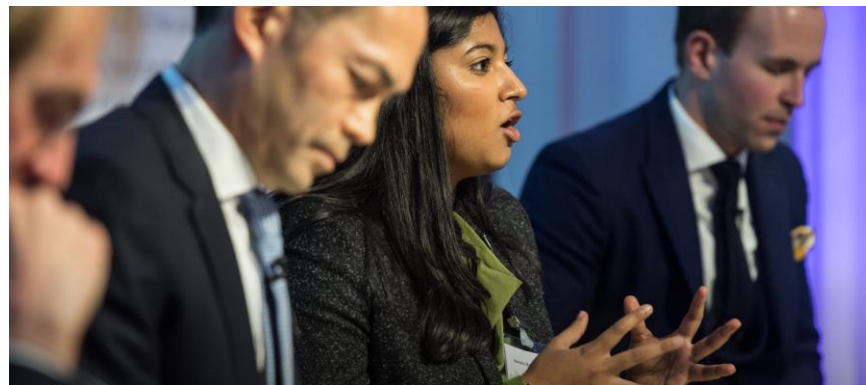
# ANNUAL FORECASTING

CFA UK's Annual Forecasting Event has established itself as an excellent opportunity for members and non-members alike to come together and discuss the prospects for the financial markets in the new calendar year.



**Number of attendees**  
130 attendees in 2023

**Audience profile**  
CFA UK members  
Non-member investment  
professionals



A man in a black shirt is talking to a group of people. He is looking towards the camera. The background shows other attendees in a social setting.

# ANNUAL FORECASTING

<b>Premium Sponsorship £20,000 + VAT</b> <b>Exclusive – 1 slot available</b>	<b>Exhibitor Sponsorship £3500 + VAT</b> <b>3 available</b>
Banner stand at registration with event branding and your logo	Your logo on the event web page and event programme
Your logo and company profile on the event web page and dedicated event marketing emails that will go out to CFA UK members (2 emails)	Exhibition stand space (3m x 2m including one dressed table)
121 speaker introductions at the post-event networking	1 delegate place for the event
4 delegate places for the event	Network with attendees at the arrival lunch, the afternoon refreshment break and the post conference drinks reception.
Exhibition stand space (3m x 2m including one dressed table)	<div data-bbox="1319 739 2377 1068" style="background-color: #f0f0d0; padding: 10px;"> <p><b>Number of attendees</b> 130 attendees in 2023</p> <p><b>Audience profile</b> CFA UK members Non-member investment professionals</p> </div>
Your logo on initial title slide on screen in the conference room	
Opportunity to provide a branded gift to all attendees.	
Opportunity to have a piece of company literature placed on the delegate seats.	
Network with attendees at the post event evening reception	
Short message to attendees included in post event email.	



# CFA UK SUSTAINABILITY COMMUNITY

We're proud to work towards a sustainable future for the industry, and society. Our members are passionate about positive change – this growing community doesn't just talk about climate change – our members shape the conversation.

23 Events hosted in one year

09 Online networking events with guest speakers

06 Webinars

05 In-person events

04 Podcasts

02 Research articles

Community members: 437  
(Jul 23 - Aug 24)

No. attended community  
events: 500+

No. attended virtual  
events: 400+



# CFA UK TECHNOLOGY & INNOVATION COMMUNITY

## LAUNCHING JANUARY 2025

This community is a platform for investment professionals who are interested in growing their skills, or those who work in investment innovation and technology. It's a place to gain knowledge, share experiences, and connect.

In-person events hosted in one year

Online networking events with guest speakers

Webinars

Podcasts

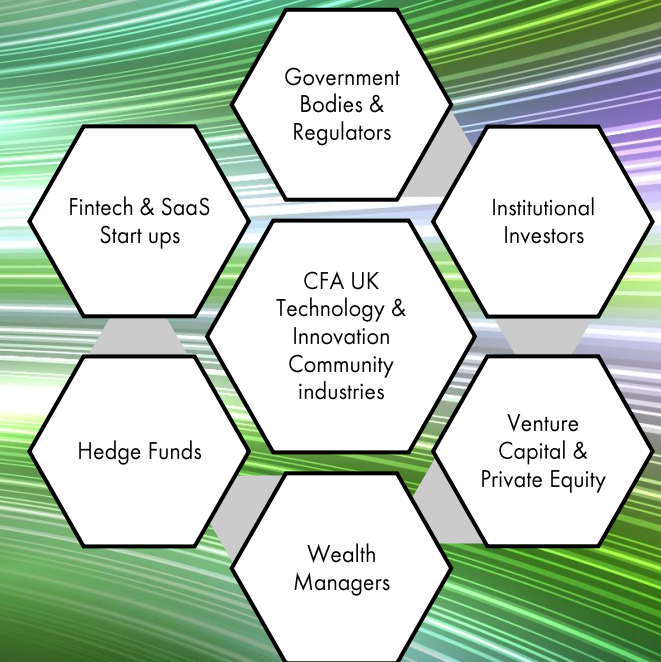
Online Forum Discussions

Research Papers & Consumer Research

### Key Companies interested:

Goldman Sachs  
Santander  
Morgan Stanley  
HSBC  
Bloomberg  
Standard Chartered Bank  
EY  
Aviva  
Scottish National Investment Bank

230+ REGISTRATIONS OF INTEREST SO FAR



# CFA UK COMMUNITY SPONSORSHIP

	CFA UK Sustainability Partner	CFA UK Technology and Innovation Partner
Package	£15,000 + VAT	£15,000 + VAT
Promotion Period	12 Months	12 Months
Networking	<ul style="list-style-type: none"> <li>2 x guest passes for CFA UK Sustainability Community online networking meet-up for 12 months</li> <li>Opportunity to host and moderate breakout rooms at two CFA UK sustainability Community online networking meetups.</li> <li>2 x guest passes to attend three in-person networking evenings for 12 months</li> <li>2 x guest passes to join the Summer Reception</li> <li>1 dedicated curated Zoom networking meeting for members of the Sustainability Community and your organisation on a specific theme</li> <li>Opportunity to present or moderate a session at CFA UK's Conference*</li> </ul>	<ul style="list-style-type: none"> <li>2 x guest passes for CFA UK Technology and Innovation Community online networking meet-up for 12 months</li> <li>Opportunity to host and moderate breakout rooms at two CFA UK Technology and Innovation Community online networking meetups.</li> <li>2 x guest passes to attend three in-person networking evenings for 12 months</li> <li>2 x guest passes to join the Summer Reception</li> <li>1 dedicated curated Zoom networking meeting for members of the Technology and Innovation Community and your organisation on a specific theme</li> <li>Opportunity to present or moderate a session at CFA UK's Conference*</li> </ul>
Content	<ul style="list-style-type: none"> <li>1 Live Webinar ( Recording available on CFA UK Professional Learning Platform )</li> <li>Senior Executive to participate in CFA UK Podcast "In Conversation" (theme to be agreed in advance)</li> <li>Opportunity to share your content, thought leadership, or research with sustainability community and a wider audience</li> </ul>	<ul style="list-style-type: none"> <li>1 Live Webinar ( Recording available on CFA UK Professional Learning Platform )</li> <li>Senior Executive to participate in CFA UK Podcast "In Conversation" (theme to be agreed in advance).</li> <li>Opportunity to share your content, thought leadership, or research with sustainability community and a wider audience</li> </ul>
Branding and Promotion	<ul style="list-style-type: none"> <li>Regular dedicated posts promoting your support and participation as "CFA UK's sustainability partner of the year" on social media.</li> <li>Visual assets available to you to use in your campaigns.</li> <li>Event banner on platforms and in event-related emails, branding, and corporate biography on the event's website</li> <li>Promotion in CFA UK's newsletter, community newsletter, CFA UK's website, event website, on social media</li> <li>Client Success Manager - a member of our team on hand in the 4 weeks before the event to help set up meetings and available throughout the event to handle any questions. We commit to 3-5 meetings, but will always seek to over-achieve</li> </ul>	<ul style="list-style-type: none"> <li>Regular dedicated posts promoting your support and participation as "CFA UK's technology and innovation Partner of the year" on social media.</li> <li>Visual assets available to you to use in your campaigns.</li> <li>Event banner on platforms and in event-related emails, branding, and corporate biography on the event's website</li> <li>Promotion in CFA UK's newsletter, community newsletter, CFA UK's website, event website, on social media</li> <li>Client Success Manager - a member of our team on hand in the 4 weeks before the event to help set up and available throughout the event to handle any questions. We commit to 3-5 meetings, but will always seek to over-achieve</li> </ul>



# RECEPTIONS & CEREMONIES SPONSORSHIP OPPORTUNITIES



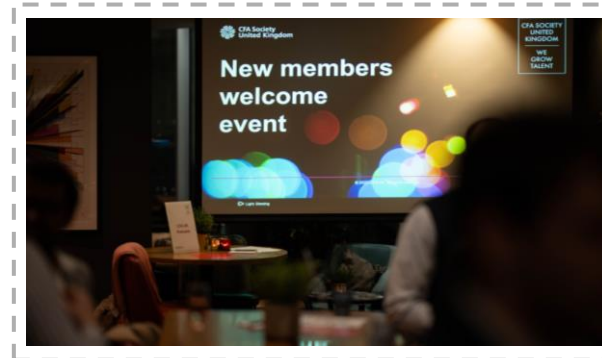
SUMMER RECEPTION



WINTER RECEPTION



CHARTERHOLDER CEREMONIES



NEW MEMBERS' WELCOME RECEPTIONS



# SUMMER RECEPTION



CFA UK annual summer reception boasts an unforgettable social evening in the impressive tree-lined avenues of the historic Lincoln's Inn Fields in London.

Exclusive to CFA UK members, attendees enjoy drinks and food while connecting with fellow members in the breathtaking surroundings of the 17<sup>th</sup> century garden.



Average number of attendees: 200 per event

Attendee Profile: CFA UK members

Dates: June, annually

# WINTER RECEPTION

The CFA UK annual winter reception, which typically follows the society's Annual General Meeting (AGM), is an exclusive social evening hosted by the CFA UK Board of Directors. Members gather in the impressive festive surroundings of the award-winning Great Hall at One Moorgate Place, London, where they enjoy drinks and canapes while connecting with fellow members.

**Average number of attendees:** 250

**Attendee Profile:** CFA UK members

**Dates:** November, annually





# CHARTERHOLDER CEREMONY

Becoming a charterholder is a defining moment for many investment professionals and exemplifies a strong understanding of advanced investment analysis and real-world portfolio management skills.

CFA UK welcomes Charterholders and their guests to two exclusive ceremonies followed by celebratory drinks receptions each year. Ceremonies are typically hosted in prestigious London venues such as Merchant Taylors Hall and the Royal Institute of Architects.

**Average number of attendees:**  
300 per event

**Attendee Profile:** newly qualified  
CFA Charter Holders plus guests

**Dates:** [February](#) and [June](#),  
annually





# NEW MEMBERS' WELCOME RECEPTIONS

The New Members' Reception is a popular social event where new society members can meet and network with fellow new members, learn about upcoming events, and discover how they can maximize their professional membership.



**Average number of attendees:** 80 per event

**Average age:** 28

**Attendee Profile:** CFA UK members within the first 12 months of membership. All membership classes.

**Dates:** October and March, annually





# RECEPTIONS & CEREMONIES

	Sponsorship Packages	Frequency	Audience	A/v attendees	When
Summer Reception	1 x premium sponsor per reception: £20,000+VAT	1 x annually	CFA UK members	200	June 2025
Winter Reception	3 x exhibition sponsors per reception: £4,500 + VAT	1 x annually	CFA UK members	250	November 2025
Charterholder Ceremony	1 x premium sponsor: £25,000 + VAT 3 x exhibition sponsors per reception: £4,500 + VAT	2 x annually	CFA UK charterholders + guests	300	February 2025 June 2025
New Member Welcome Reception	1 x premium sponsor: £15,000 + VAT	2 x annually	CFA UK new members	80	March 2025 September 2025

# RECEPTIONS & CEREMONIES

<b>Premium Sponsorship</b> <b>1 slot available</b>	<b>Exhibitor Sponsorship</b> <b>3 available</b>
Banner stand at registration with event branding and your logo	Your logo on the event web page and event programme
Your logo and company profile on the event web page and dedicated event marketing emails that will go out to CFA UK members (2 emails)	Exhibition stand space (3m x 2m including one dressed table)
Exhibition stand space (3m x 2m including one dressed table)	1 delegate place for the event
4 delegate places for the event	Network with attendees at the event reception
Opportunity to share a company literature or thought piece with the attendees.	
Your logo on the initial title slide on the screen in the event room	
Opportunity to provide a branded gift to all attendees.	
Network with attendees at the event reception	
Short message to attendees included in post event email.	

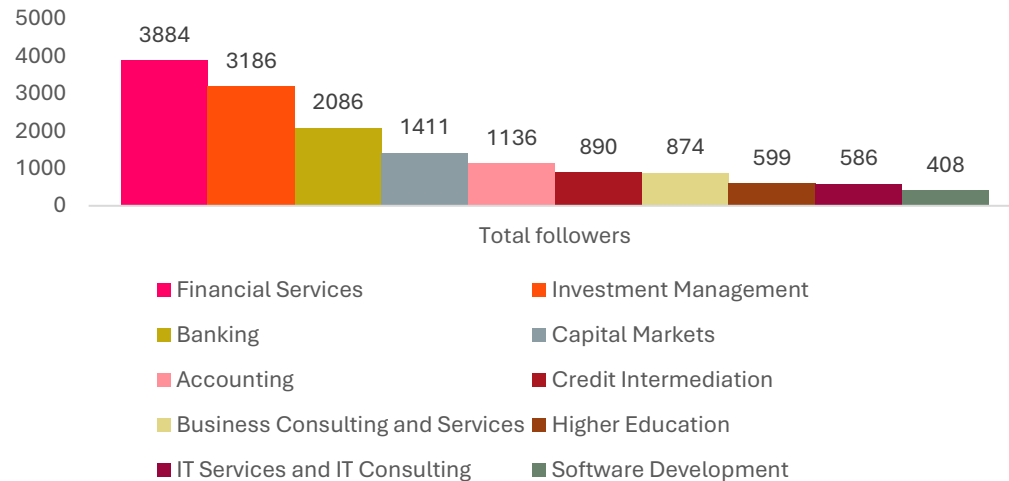
# Marketing & Communication Channels

# SOCIAL MEDIA

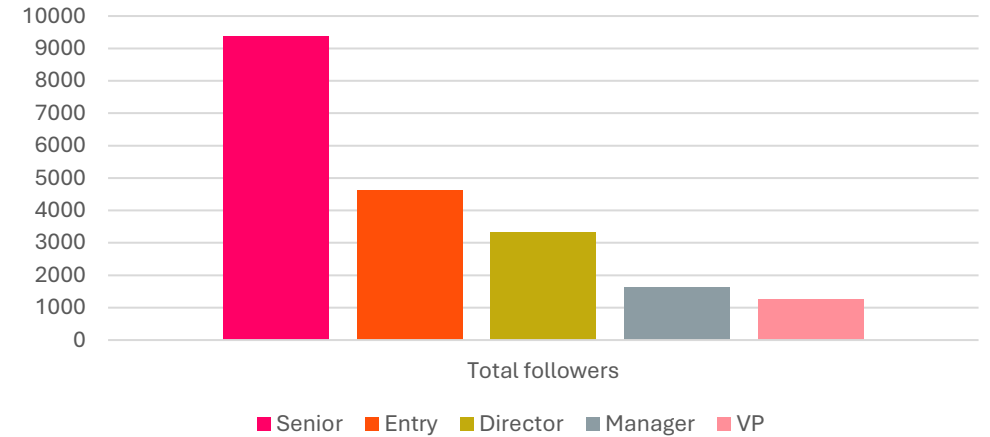
## LinkedIn

25, 400 followers  
6.1% engagement

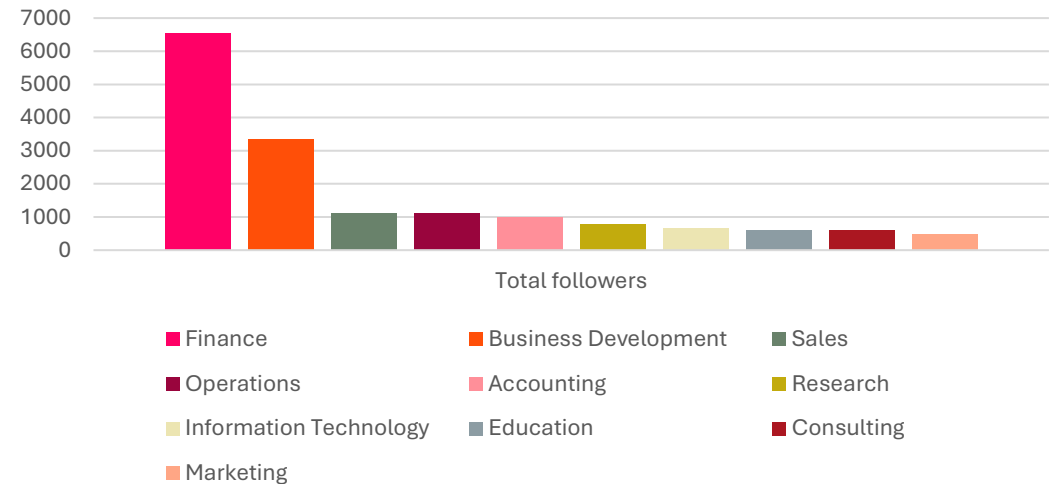
Top 10 by industry



Top 5 seniority



Top 10 by job function





# EMAIL

Audience	Estimated reach
CFA UK members	11k
IMC opted-in audience	2.5k
Impact opted-in audience	2.1k
Climate opted-in audience	1.8k



## Topline statistics



Membership average open rate: 52.5%

Membership average CTR: 6%

Qualification average open rate: 54%

Qualification average CTR: 7.8%

# GET IN TOUCH WITH OUR TEAM OUTREACH

---



---

**PRANEET SHIVAPRASAD**

Director of Outreach  
[Pshivaprasad@cfauk.org](mailto:Pshivaprasad@cfauk.org)



---

**MAHAK DUA**

Outreach Executive  
[Mdua@cfauk.org](mailto:Mdua@cfauk.org)