



Commercial Finance Association

HOUSTON
CHAPTER

2018 CORNERSTONE SPONSORSHIP PITCHBOOK



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2018 CORNERSTONE SPONSORS

DIAMOND



GOLD



SILVER



JOHNSON DE LUCA KURISKY & GOULD, P.C.
ATTORNEYS AND COUNSELORS



BRONZE





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CHAPTER MEMBERSHIP PROFILE

Membership Profile	2017 Members
Banks and other regulated lending institutions	70
Independent non-bank financial institutions	51
CPA firms, audit, tax, consulting, advisory	24
Attorneys	22
Business executives, other	12
Turnaround, restructuring, consulting, advisory	20
Investment banks, intermediaries and other advisory services	9
Private equity groups	5
Due diligence, investigations, appraisal & field exam services	9
Insurance	6
Real Estate Lending, advisory, other services	1
Individual investment advisors	1
TOTAL	230



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EVENTS & ATTENDANCE – 2017 RECAP

EVENT	LOCATION	DATE	REGISTERED
2017 Economic Forecast – <i>Houston’s Economy in the Wake of the Oil Bust: Is It Really Over?</i>	La Colombe d’Or	January 25	103
<i>YoPro! Inaugural Happy Hour</i>	Platypus Brewing	February 15	65
Lunch & Learn hosted by BDO – <i>Navigating Downturn: Succeeding in an Environment of Constraint</i>	Offices of BDO	February 28	36
Spring Networking Social	The Tasting Room – Uptown Park	April 25	53
Lunch & Learn hosted by Winstead PC – <i>Market Update and Restructuring Trends in Energy and Retail</i> (presented by Winstead and FTI Consulting)	Offices of Winstead	May 16	44
YoPro! Summer Happy Hour	Goode’s Armadillo Palace	May 23	24
Luncheon Panel – <i>High Finance at the Court: Distressed and Bankruptcy M&A</i>	Brennan’s Downtown	June 28	83
Luncheon Panel – Annual State of the Private Equity Markets	Vic & Anthony’s Steakhouse	September 13	84
Lunch & Learn hosted by Whitley Penn – <i>Energy Trends in Private Equity</i>	Offices of Whitley Penn	September 21	34
YoPro! Happy Hour	Benjy’s on Washington	September 28	38
Lunch & Learn hosted by Weinstein Spira – <i>The Financial Statement Maze: 5 Elements Not to Miss</i>	Carrabba’s – Kirby Drive	November 2	42
CFA/ACG/TMA Annual Joint Networking Reception & Mixer	Greater Houston Partnership	November 30	62
Average Open Event Attendance			96
Average Closed Event Attendance			42



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2018 WORKING SCHEDULE OF EVENTS

Event	Location*	Date*	
2018 Economic Outlook presented by Filip Blazheski, Senior Economist, BBVA Research / BBVA Compass	The Briar Club	February 20	
Lunch & Learn hosted by Briggs & Veselka Co. – <i>Tax Reform: What Businesses and Individuals Need to Know</i>	Offices of Briggs & Veselka Co.	March 1	
2018 CFA Member Meet & Greet Happy Hour	Damian's	May 3	
YoPro! Networking Happy Hour	Lucky Strike	May 10	
Lunch & Learn hosted by Winstead PC	Offices of Winstead	May 30	
YoPro! Summer Event	Kirby Ice House	July 19	
Luncheon Panel – Lending in Today's Economy	Brennan's Downtown	June 27	
Luncheon Panel – Annual State of the Private Equity Markets	Vic & Anthony's Steakhouse	September 19	
Lunch & Learn hosted by Whitley Penn	Offices of Whitley Penn	October 4	
YoPro! Fall Event	To be announced	September / October	
CFA/ACG/TMA Annual Joint Networking Reception & Mixer	To be announced	October / November	
Lunch & Learn hosted by Weinstein Spira	To be announced	November	
Sponsor Appreciation Dinner	To be announced	November	

* Dates & locations subject to change



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CORNERSTONE SPONSORSHIP LEVELS & BENEFITS – COMPARISON

Level	Cost	Signage, Recognition, Exposure	Free Events	Exclusive Events	# Members Included	Hard \$ Value to Sponsor	Other Benefits
DIAMOND	\$6,000	All events, all emails, member directory, printed materials, website	Preferred, reserved table of 10 at <u>all</u> luncheon events	Invitations to the sponsor appreciation event and new member welcome event	5	\$5,100+	See details on next pages.
GOLD	\$3,500	All events, all emails, member directory, printed materials, website	Preferred, reserved table of 10 at <u>any 2</u> luncheon events	Invitations to the sponsor appreciation event and new member welcome event	3	\$3,300+	See details on next pages.
SILVER	\$1,500	All events, all emails, member directory, printed materials, website	Admission for 2 at <u>all</u> luncheon events	Invitations to the sponsor appreciation event and new member welcome event	2	\$1,500+	See details on next pages.
BRONZE	\$750	All events, all emails, member directory, printed materials, website	Admission for 1 at <u>all</u> luncheon events	Invitation to the sponsor appreciation event and new member welcome event	1	\$750	See details on next pages.

Lunch & Learn Host	No Cost to Host	<p>Opportunity to host one or more educational events at <u>your</u> company's office!</p> <ul style="list-style-type: none"> •Sponsor hosts have input on programming, subject matter, and speakers •Must be able to accommodate at least 20-30 attendees •Simply provide lunch for attendees •Attendance at the luncheons is FREE to all Houston CFA members 					
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CORNERSTONE LEVELS & BENEFITS

DIAMOND

- Annual membership for five
- Recognition as a Diamond Sponsor in EVERYTHING:
 - email invitations
 - event handout materials
 - event signage
 - e-newsletter
 - member directory
 - website
- Complimentary preferred, reserved table for ten at all Houston luncheon events (3-4 annually)
- Invitation to the exclusive sponsor appreciation dinner
- Invitations for five to the new member event



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CORNERSTONE LEVELS & BENEFITS

GOLD

- Annual membership for three
- Recognition as a Gold Sponsor in EVERYTHING:
 - email invitations
 - event handout materials
 - event signage
 - e-newsletter
 - member directory
 - website
- Complimentary preferred, reserved table for ten at any 2 Houston luncheon events
(3-4 annually)
- Invitation to the exclusive sponsor appreciation dinner
- Invitations for three to the new member event



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CORNERSTONE LEVELS & BENEFITS

SILVER

- Annual membership for two
- Recognition as a Silver Sponsor in EVERYTHING:
 - email invitations
 - event handout materials
 - event signage
 - e-newsletter
 - member directory
 - website
- Complimentary admission for two at all Houston luncheon events (3-4 annually)
- Invitation to the exclusive sponsor appreciation dinner
- Invitations for two to the new member event



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CORNERSTONE LEVELS & BENEFITS

BRONZE

- Annual membership for one
- Recognition as a Bronze Sponsor in EVERYTHING:
 - email invitations
 - event handout materials
 - event signage
 - e-newsletter
 - member directory
 - website
- Complimentary admission for one at all Houston luncheon events (3-4 annually)
- Invitation to the exclusive sponsor appreciation dinner
- Invitation for one to the new member event



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LUNCH & LEARN HOST

- Hosts have input on programming, subject matter, and speakers
- Recognition as a Lunch Sponsor Host in:
 - email invitations
 - event handout materials
 - e-newsletter
 - website
- Must be able to accommodate at least 20 – 30 attendees.
- Simply provide lunch for attendees.
- Attendance at the luncheons is FREE to all Houston CFA members.
- Availability is limited. See Program Committee Chair or Chapter Administrator for more information.



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2018 HOUSTON CHAPTER OFFICERS

PRESIDENT

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FIRST VICE PRESIDENT

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