



Commercial Finance Association

**HOUSTON
CHAPTER**

**2019
Cornerstone Sponsor
Pitchbook**



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2019 CORNERSTONE SPONSORS

DIAMOND



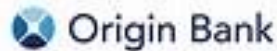
GOLD



SILVER



BRONZE





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CHAPTER MEMBERSHIP PROFILE

Membership Profile	2018 Members
Banks and other regulated lending institutions	79
Independent non-bank financial institutions	46
Attorneys	30
CPA firms, audit, tax, consulting, advisory	17
Turnaround, restructuring, consulting, advisory	19
Business executives, other	9
Investment banks, intermediaries and other advisory services	8
Insurance	7
Private equity groups	5
Due diligence, investigations, appraisal & field exam services	4
Real Estate Lending, advisory, other services	1
Individual investment advisors	2
TOTAL	227



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EVENTS & ATTENDANCE – 2018 RECAP

Event	Location	Date	Registered
2018 Economic Outlook presented by Filip Blazheski, Senior Economist, BBVA Research / BBVA Compass	The Briar Club	February 20	110
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	40
2018 CFA Member Meet & Greet Happy Hour	Damian’s	May 3	40
YoPro! Networking Happy Hour	Lucky Strike	May 10	15
Lunch & Learn hosted by Winstead PC	Offices of Winstead	May 30	39
Luncheon Panel – Lending in Today’s Economy	Brennan’s Downtown	June 27	86
YoPro! Summer Event	Kirby Ice House	July 19	34
Luncheon Panel – Annual State of the Private Equity Markets	Vic & Anthony’s Steakhouse	September 19	135
Lunch & Learn hosted by Whitley Penn	Offices of Whitley Penn	October 4	33
YoPro! Fall Event	Platypus	October 18	35
CFA/ACG/TMA Annual Joint Networking Reception & Mixer	The Grotto Downtown	October 25	60
Lunch & Learn hosted by Weinstein Spira	Seasons 52	November 14	28
Sponsor Appreciation Dinner	Pappas Bros Steakhouse	December 4	



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2019 WORKING SCHEDULE OF EVENTS

Event	Location*	Date*	Attendance
2019 Economic Outlook	The Briar Club	January 23, 2019	
YoPro! Networking Happy Hour	Kirby Ice House	January 31, 2019	
Lunch & Learn	TBD	TBD	
2018 CFA Member Meet & Greet Happy Hour	TBD	TBD	
YoPro! Networking Happy Hour	TBD	TBD	
Lunch & Learn	TBD	TBD	
Luncheon Panel	TBD	TBD	
YoPro! Summer Event	TBD	TBD	
Luncheon Panel – Annual State of the Private Equity Markets	TBD	TBD	
Lunch & Learn	TBD	TBD	
YoPro! Fall Event	TBD	TBD	
CFA/ACG/TMA Annual Joint Networking Reception & Mixer	TBD	TBD	
Lunch & Learn	TBD	TBD	
Sponsor Appreciation Dinner	TBD	TBD	

* 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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2019 HOUSTON CHAPTER OFFICERS

PRESIDENT

Adam Cox – Pendleton Capital Group – adam@pendletoncapitalgroup.com

FIRST VICE PRESIDENT

Brian Hanley – IBERIABANK – brian.hanley@iberiabank.com

VICE PRESIDENT – SPONSOR COMMITTEE CHAIR

Ashley Angelle – Origin Bank – aangelle@origin.bank

VICE PRESIDENT – PROGRAM COMMITTEE CHAIR

Jason Sharp– Briggs & Veselka – JSharp@BVCCPA.COM

VICE PRESIDENT – MEMBERSHIP COMMITTEE CHAIR

Daniel Martinez – Amerisource – dmartinez@Amerisource.us.com

VICE PRESIDENT – MARKETING COMMITTEE CHAIR

Bill Penczak – Briggs & Veselka – bpenczak@bvccpa.com

VICE PRESIDENT –YOPRO COMMITTEE CHAIR

William Kemp– Republic Business Credit – wkemp@republicbc.com

For more information, please contact:

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