



Houston Chapter



**Secured Finance
Network**

HOUSTON

*Commercial Finance Association Houston is becoming
Secured Finance Network Houston*

2019 Cornerstone Sponsor Pitchbook



Commercial Finance Association

HOUSTON
CHAPTER

2019 CORNERSTONE SPONSORS

DIAMOND



GOLD



SILVER



BRONZE





Commercial Finance Association

HOUSTON
CHAPTER

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



Commercial Finance Association

HOUSTON
CHAPTER

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	



Commercial Finance Association

HOUSTON
CHAPTER

2019 WORKING SCHEDULE OF EVENTS

Event	Location*	Date*	Attendance
2019 Economic Outlook	The Briar Club	January 23, 2019	104
YoPro! Networking Happy Hour	Kirby Ice House	January 31, 2019	33
Lunch & Learn	Briggs & Veselka	February 25, 2019	31
YoPro! Networking Happy Hour	Height Bier Garten	May 16, 2019	
2019 CFA Member Meet & Greet Happy Hour	St Arnold Brewing	June 5, 2019	
Lunch & Learn	TBD	TBD	
Luncheon Panel	Brennan's of Houston	June 26, 2019	
YoPro! Summer Event	TBD	TBD	
Luncheon Panel – Annual State of the Private Equity Markets	Vic & Anthonys	September 25, 2019	
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



Commercial Finance Association

HOUSTON
CHAPTER

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 					
--------------------	-----------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--	--	--	--	--



Commercial Finance Association

HOUSTON
CHAPTER

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



Commercial Finance Association

HOUSTON
CHAPTER

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



Commercial Finance Association

HOUSTON
CHAPTER

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



Commercial Finance Association

HOUSTON
CHAPTER

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



Commercial Finance Association

HOUSTON
CHAPTER

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.



Commercial Finance Association

HOUSTON
CHAPTER

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:

Anna Chandler, Houston Chapter Administrator
(704) 733-9791 or houston@cfa.com