



## February 2015

### CFA Institute Research Challenge in Los Angeles

Friday, February 20th, 2015

Dear Members,

CFA Society Los Angeles is proud to host the CFA Institute Research Challenge in Los Angeles. This year's subject company is **The Walt Disney Company**

We invite you all to attend this great event to watch graduate and undergraduate students present their analysis of a local company to a panel of judges and industry professionals such as yourselves. The students put a great deal of work into their written reports and presentations and will benefit even more from presenting to an enthusiastic audience! The presentations begin at **3:00pm on Friday, February 20th at the Biltmore Hotel in downtown Los Angeles. Networking and cocktail hour begins at 5:30pm.** A component of this event that will be of interest to students and CFALA members is our Career Chat presentations. The speakers will give brief presentations during the networking portion of the event and discuss their diverse career paths.

The CFA Institute Research Challenge offers students the unique opportunity to learn from leading industry experts and compete with peers from the world's top finance programs. This annual educational initiative promotes best practices in equity research among the next generation of analysts through hands-on mentoring and intensive training in company analysis and presentation skills. Five universities from the Los Angeles area will compete in the 2015 competition. The final research reports and presentations will be evaluated locally and the winning team will advance to the Americas Regional Final in Atlanta, GA, in April. If you are interested in additional information on the challenge, [click here](#) to view the official website.

Please come out and support these future charterholders, network with other society members and, if you are an alumni of one of the participating schools, you can cheer on your alma mater! **This event is hosted for all CFALA members!**

**This year's teams are from the following schools:**

University of Southern California (USC)  
California Polytechnic State University (Cal Poly), San Luis Obispo  
College of the Canyons  
Claremont Graduate School, Drucker School of Management  
University of California, Santa Barbara

**Location:** [Millennium Biltmore Hotel Los Angeles](#) - Bernards  
506 South Grand Avenue  
Los Angeles, CA 90071-2607

**Parking:** Hotel Valet Parking: \$20.00  
Self-Parking at Pershing Square (located directly across the street on Olive St.): \$10.00



**Agenda:** 2:30pm Check-in  
3:00pm - 5:30pm Presentations  
5:30pm - 7:00pm Networking and Career Chat Presentations with Appetizers and Cocktails

**Registration Link:**

**Registration is free for all CFALA members!**

Non-members: \$35

## Meet Your Mentor Mixer - Spring 2015

**Monday, February 23rd, 2015**

**5:30 pm – 8:00 pm**

**Chair: Kush Gupta, CFA**

CFALA Members who are mentors and Level I Candidates enrolled in the **Spring 2015 USC/CFALA CFA Review Program**, please join us on Monday, January 23rd at the Bonaventure Brewing Company for drinks and appetizers. This is a great opportunity for mentors and mentees to meet in a relaxed setting.

**Date:** February 23rd, 2015

**Location:** Bonaventure Brewing Company  
404 South Figueroa Street (at 4th Street),  
Los Angeles, CA.

**Time:** 5:30pm - 7:30pm

**Cost:** Free to CFALA Mentors and Mentees

**Validated valet parking:** \$7.00

Park in the Bonaventure Hotel valet parking (*entrance located on Flower St between 4th and 5th*) **and** take the escalator (*guest elevators do not stop on the 4th floor*) to the 4th floor and make a right.

**To Register** [click here](#)

If you are a CFALA member who would like more information regarding being a mentor or a level I candidate enrolled in the USC/CFALA CFA Review Program and would like to be assigned a mentor, please contact Kush Gupta at [kushhg@gmail.com](mailto:kushhg@gmail.com)

## Using Brain Science To Enhance Your Clients' Financial Success & Emotional Wellbeing

Tuesday, February 24th, 2015

**Speakers: Arun Abey, Bernie Bolger and Dr. Jay Kumar**

*An Applied Behavioral Finance and Private Wealth Management group co-sponsored event*

The key to optimizing customer relationships requires that you not only manage your clients' financial wealth, but assist them to link this to a plan that invests in their long-term health and happiness. Led by renowned experts in the respective fields of financial investment ([Arun Abey](#)), behavioral psychology ([Bernie Bolger](#)) and social neuroscience ([Dr. Jay Kumar](#)), this unique seminar draws upon and applies the latest brain science research into actionable strategies to improve your effectiveness as a financial planner and wealth manager. Specifically, the presentation helps you to achieve three goals: 1) empower your relationship with clients as both a respected expert and a trusted counsel 2) align your clients' financial resources, regardless of market performance, with greater emotional prosperity and 3) implement a value proposition where success is measured not just as a quantitative bank-balance but also as a qualitative life-balance. Ultimately, we provide financial advisors with soft-skills training which allows them to generate two sources of value for their clients: the currency of long-term financial success and that of emotional wellbeing. Discover how this next-generation of wealth management will create sustained value for both your clients and your business.

As a participant in the CFA Institute Approved-Provider Program, the CFA Society of Los Angeles has determined that this program qualifies for 1 credit hours. If you are a CFA Institute member, CE credit for your participation in this program will be automatically recorded in your CE Diary.

### Registration Links

CFALA Members: \$20.00([place cursor on amount for link](#))

Student Discount: \$30.00 (Valid Student ID with current year shown - required at the event)

Non-members: \$60.00 ([place cursor on amount for link](#))

**Date:** Tuesday, February 24th, 2015

**Time:** 12:00pm – 1:30pm, Lunch

**Location:** [Intercontinental Hotel, Century City](#)

2151 Avenue of Stars

Los Angeles, California 90067

**Parking:** Valet \$12



## Education Registration Policies

### INFORMATION

Specific questions on course content should be directed to the course coordinator and education chair. General questions should be directed to Laura Carney at the CFALA administration office at 213-613-1503 x702 or e-mail: [info@cfala.org](mailto:info@cfala.org).

### CONFIRMATIONS

The Society will only send confirmations of enrollment by e-mail. You will be notified if a course has been oversubscribed or canceled. If applicable: grades and/or certificates of completion will be made available only if requested from the course coordinator or instructor at the conclusion of the course.

### CANCELLATIONS

Cancellations must be made in writing and received at least 5 business days before the first day of class. Please fax or e-mail cancellations to: (213) 613-1503 or [info@cfala.org](mailto:info@cfala.org). All cancellations will incur a \$30.00 processing fee. If canceled after the 5-day deadline, a 50% cancellation fee will be charged. The Society reserves the right to cancel any course for any reason. Society cancellation will usually occur because of insufficient preliminary enrollment. The Society will call registrants to notify them of any course cancellations. All prepaid fees will be refunded. The Society also reserves the right to change the location, date and/or time of a course, in which case prior notification will be given to students.

### PAYMENTS

Make all checks payable and send to: CFA Society of Los Angeles, Inc., 520 S. Grand, Ste 370, Los Angeles, CA 90071. Returned checks will incur a \$35 returned check fee. You may also pay by credit card through our online registration at: <http://www.cfala.org/cfmfiles/cal/eventlist1.cfm?t=g>

## Event Registration Policies

### CFALA MEMBER REGISTRATION GUIDELINES

All reservations must be made via website. In order to assure quality and service to our members, please make reservations in advance.

Please make your reservation online. Reservation deadline: 12 noon, two business days prior to an event. Limited space may be available after this deadline. No confirmations are made. You will only be contacted at the phone number provided on your RSVP if space is not available.

### CANCELLATIONS

Cancellations must be received in writing by 9:00 am the day prior to the event. No phone cancellations are accepted. Please fax to the CFALA office at (213) 613-1503 or e-mail [info@cfala.org](mailto:info@cfala.org). Member "no-shows" will be billed at \$40 unless otherwise noted. CFALA members will be billed the additional \$20 to meet the \$40 "no-show" fee requirement.

**GUESTS** fees are \$50 for CFALA events unless otherwise noted. Payment must be received prior to the event. Returned checks will incur a \$35 charge.