



# SPONSORSHIP



# OPPORTUNITIES



## CFA Society Los Angeles 12th Annual Economic and Investments Forecast Dinner

February 6, 2014



CFA Society  
Los Angeles

# CFA Society Los Angeles 12th Annual Economic and Investments Forecast Dinner

February 6, 2014

## MILLENNIUM BILTMORE HOTEL

506 South Grand Avenue, Los Angeles, CA 90071

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5:30 pm . . . . . Cocktail Hour

6:30 pm . . . . . Dinner

7:00 pm . . . . . Panel Discussion

## DISCUSSION PANEL

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### MODERATOR

**Jane Wells**, *Business News Reporter*, CNBC

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**Nancy Lazar**, *Partner*, Cornerstone Macro

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**Greg Valliere**, *Chief Political Strategist*  
Potomac Research Group

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**William C. Dunkelberg, Ph.D.**, *Chief Economist*  
National Federation of Independent Business

# DISCUSSION PANEL 2014

**Jane Wells**, CNBC business news reporter, is based in Los Angeles, where she covers retail, agriculture and defense as well as reports on California's economy, West Coast real estate and Las Vegas. Jane also writes the blog *Funny Business* for CNBC.com covering a variety of unusual items. She came from CNBC's "Upfront Tonight," where she served as a senior correspondent.

Jane has received numerous honors for her work, including a 1992 Peabody Award and duPont Award for her role in the live coverage of the Rodney King Trial. That same year, she earned a Los Angeles Emmy Award for her investigative reporting. She also has received UPI, Press Club and Emmy Awards for feature reporting; three Florida Emmy Awards for news reporting; and the Investigative Reporters and Editors Award for team reporting.

Jane holds bachelor's degrees in broadcast journalism and philosophy from the University of Southern California, where she graduated with honors. She and her husband have two children and live in Los Angeles.



**Nancy R. Lazar** leads the Economic Research team of Cornerstone Macro. Nancy's work as an economist is renowned for its forward-looking and detail-oriented insights. Before founding Cornerstone, she was the Vice Chairman and Co-Founder of ISI Group for over 20 years. Nancy has been an Institutional Investor-ranked economist for the past 12 years, and has been ranked #2 for the past four years. Prior to founding ISI in 1991, Nancy was a Senior Vice-President at CJ Lawrence. Nancy graduated from Kalamazoo College in 1979. She is a member of The Economic Club of New York, New York Forecasters, Money Marketeers, NYABE, NABE, and Women in Finance & Housing.



**Greg Valliere** is the Chief Political Strategist at the Potomac Research Group, a non-partisan firm that advises investors on how Washington affects the markets. Greg has over 30 years of experience in analyzing Washington policies; he has held several positions, including Director of Research at the Charles Schwab Washington Research Group. Greg specializes in coverage of the Federal Reserve, tax and budget policy, and – of course – politics. Greg is widely quoted in the nation's financial press, and is a regular guest on CNBC, CNN, Fox TV and Bloomberg TV and radio, and he is a frequent contributor to CBS radio. A graduate of George Washington University, Greg and his wife Mary live in downtown DC at the Watergate.



**William C. Dunkelberg, PhD**, is the Chief Economist for the National Federation of Independent Business and is the Economic Strategist for Boenning & Scattergood. He is also Professor Emeritus of Economics in the College of Liberal Arts, Temple University, where he served as Dean of the School of Business and Management from 1987 through 1994. He is a nationally known authority on small business, entrepreneurship, consumer credit and government policy. William has presented expert testimony before the U.S. House and Senate on consumer credit, inflation, tax reform, the minimum wage, small business, electronic funds transfer systems, energy efficiency standards, health care and monetary and fiscal policy. He has appeared on CNBC, Bloomberg, FOX, CNN, MSNBC, the ABC, CBS, NBC Evening News programs and Good Morning America. He is frequently quoted in major news publications including the *Wall Street Journal*, *Forbes*, *Bloomberg Business Week*, the *New York Times*, *U.S. News and World Report*, *USA Today*. William serves on the economic forecasting panels for *USA Today* and *Bloomberg* and as an economic advisor to ABC News. He has authored and co-authored numerous books and articles and writes a monthly small business economic report for the National Federation of Independent Business (NFIB.com/research). He has B.A., M.A. and Ph.D. degrees in Economics from the University of Michigan.



# YOUR OPPORTUNITY TO SHINE

Sponsorship provides an excellent way to spotlight your company to current and potential clients. As a sponsor you will receive the benefits described below and recognition as a unique member of a special community.

Additionally, you will be supporting a worthy charitable cause. The CFA Society Los Angeles (CFALA) will donate up to 50% of the net proceeds of the Event Sponsor, Platinum and Gold categories towards its Investment Literacy Program. CFALA has engaged the California Council on Economic Education (CCEE) to help implement its Investment Literacy vision. For those so inclined, CFALA can arrange for a tax-deductible contribution directly to the CCEE, a 501(c)(3) charitable organization. Please ask about the Diamond Direct donation.

## Sponsorship Categories

<p><b>Event Sponsor (limit 2)</b> .....</p> <ul style="list-style-type: none"> <li>■ Invitation to attend cocktail reception with Moderator and Panelists</li> <li>■ Enlarged Front Stage signage, prominently displayed</li> <li>■ Logo placement on Lobby signage, prominently displayed</li> </ul>	<ul style="list-style-type: none"> <li>■ Acknowledgment as an Event Sponsor in a half-page ad in the Dinner Program</li> <li>■ Premier table location</li> <li>■ One table at the Premier table location/10 dinner tickets</li> <li>■ Logo on event registration site with hyperlink to your company's website – if committed by January 17</li> </ul>	<p>.....<b>\$10,000</b></p>
<p><b>Platinum</b> .....</p> <ul style="list-style-type: none"> <li>■ Front Stage signage</li> <li>■ Logo placement on Lobby signage</li> <li>■ Acknowledgment as a Platinum Sponsor in the Dinner Program</li> </ul>	<ul style="list-style-type: none"> <li>■ Preferred table location</li> <li>■ One table at the Forecast Dinner/10 dinner tickets</li> <li>■ Logo on event registration page – if committed by January 17</li> </ul>	<p>.....<b>\$5,000</b></p>
<p><b>Gold</b> .....</p> <ul style="list-style-type: none"> <li>■ Logo placement on Lobby signage</li> <li>■ Acknowledgment as a Gold Sponsor in the Dinner Program</li> </ul>	<ul style="list-style-type: none"> <li>■ Preferred table location</li> <li>■ One table at the Forecast Dinner/10 dinner tickets</li> </ul>	<p>.....<b>\$3,500</b></p>
<p><b>DIAMOND DIRECT - Direct tax-deductible donation to the CCEE (limit 4)</b> .....</p> <ul style="list-style-type: none"> <li>■ 501(c) (3) write off</li> <li>■ Front Stage signage</li> <li>■ Logo placement on Lobby signage</li> </ul>	<ul style="list-style-type: none"> <li>■ Acknowledgment as a DIAMOND DIRECT Sponsor in the Dinner Program</li> <li>■ Preferred table location</li> <li>■ One table at the Forecast Dinner/10 dinner tickets</li> </ul>	<p>.....<b>\$5,000</b></p>
<p><b>Wine Sponsor (Limit 3)</b> .....</p> <ul style="list-style-type: none"> <li>■ Acknowledgment as a Wine Sponsor in the Dinner Program</li> <li>■ One dinner ticket</li> </ul>	<ul style="list-style-type: none"> <li>■ Logo placement on Lobby signage</li> <li>■ Logo placement on wine glass tags</li> </ul>	<p>.....<b>\$1,750</b></p>



# FUNDRAISING FOR CFALA INVESTMENT LITERACY PROGRAM 2014

**For the ninth consecutive year, CFALA is sponsoring two high school student contests in the metropolitan Los Angeles area with California Council on Economic Education.**

CFALA focuses on promoting the importance of sound investment knowledge that leads to informed investment decisions. What better way to achieve this goal than to start with the education system?

Teacher recruitment emphasizes districts and schools that serve minority and lower socio-economic communities. For some students, this is their first exposure to a world outside their neighborhood and their perceived limitations. The program often helps students see their potential in a much wider arena.

CFALA mentor volunteers assist in the classroom to help teachers and students understand the economic lessons. Students learn how to translate economic indicators into daily information to use in a sound financial decision-making process. Here's how the two contests work:

## **Capital Markets Contest**

Combines the excitement of an athletic competition and the pride of academic achievement:

- Teams invest a hypothetical \$100,000 in stocks and mutual funds
- CFALA mentors help students develop the analytical tools essential to a long-term investment perspective.

- Teams prepare an essay using changes in economic indicators to describe the state of the economy during the period of the contest.
- High-scoring teams move onto the contest and present to a panel of judges, including CFALA members.

## **Financial Advisor Challenge**

The only competition where students take on the role of financial advisor:

- Students participate in the 10-week, in-class stock market simulation game.
- CFALA mentors teach up to three lessons on financial markets and financial planning
- Students develop a portfolio for real-life investment scenarios for clients.
- Portfolios consider criteria, such as: investor goals and objectives, risk tolerance, time horizon and investment instruments.
- Teacher select one team to send to CCEE for judging.
- High-scoring teams move onto the finals and present to a panel of judges, including CFALA members.

## **BE A CLASSROOM MENTOR THIS YEAR**

Contact [info@cfala.org](mailto:info@cfala.org) for more information.

The CFA Society Los Angeles (CFALA) is a not-for-profit organization of approximately 2,000 financial professionals. The CFA Society Los Angeles promotes financial expertise, integrity, and professional skills among our members and CFA charter candidates. We improve the quality of financial decision-making throughout society by developing our members' ability to provide valuable leadership for their clients, their firms, and the CFA Institute. The means by which we accomplish and communicate our mission includes educational programs, networking events, and public advocacy.

California Council on Economic Education is the leader in economic and personal financial education to K-12 teachers and students in California. Visit [www.ccee.org](http://www.ccee.org) to learn how this award-winning, nonprofit organization brings economic and personal finance lessons to hundreds of thousands of California students.

# SPONSORSHIP REGISTRATION & PAYMENT FORM

**Register to be a Sponsor** by faxing completed forms to 213.613.1233 and mailing payments to 520 South Grand Avenue, Suite 370, Los Angeles, CA 90071, **OR register and pay online** at [www.cfala.org](http://www.cfala.org)

Please print or type:

Company \_\_\_\_\_

Principal Contact Person \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone ( ) \_\_\_\_\_ Fax ( ) \_\_\_\_\_

Email Address \_\_\_\_\_

*Guest Names*

*Email Addresses*

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Guest Names must be submitted by **January 31, 2014.**

By listing an email address you are agreeing to give CFALA permission to release the above names and email addresses to the speakers, if requested.

**SPONSOR LEVEL:**

- Event Sponsor** ..... \$10,000
- Platinum** ..... \$5,000
- Gold** ..... \$3,500
- DIAMOND/DIRECT** ..... \$5,000  
Checks only, payable to  
"California Council on Economic Education"
- Wine Sponsor** ..... \$1,750

**RESERVATION AND PAYMENT:**

Number of tables (10 seats per table) \_\_\_\_\_

Payment Amount: \$ \_\_\_\_\_

- Payment Type:  Check Enclosed       Online payment  
 American Express       Mastercard/VISA

Account Number \_\_\_\_\_  
(for fax payment only)

Name on Account \_\_\_\_\_

Expiration Date \_\_\_\_\_

Signature \_\_\_\_\_

**FOR SPONSORSHIP INQUIRIES**, contact Laura Carney at 213.613.1503, x701, or [laura@cfala.org](mailto:laura@cfala.org). Sponsorship registration, company logos and specifications must be received by the CFALA Office by **Friday, January 17, 2014**. Please email logos to [laura@cfala.org](mailto:laura@cfala.org). Vector files (eps) are preferred, but hi-res (300 dpi) .tif or .jpg are acceptable. Logos not received by the due date are not guaranteed placement as listed in the Sponsorship agreement.