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Top Economists, Strategists Scheduled for CFALA 2011 Economic & Investments Forecast Dinner

CFALA’s annual forecast dinner will be held from 5 pm to 8 pm on Thursday, Feb. 10, 2011 at the Wilshire Grand Los Angeles, with three highly respected commentators providing their views and answering questions on what lies ahead for the global and domestic economies and financial markets. Members of the media are welcome.

Moderator for this year’s panel will be Maria Fiorini Ramirez, President & Chief Executive Officer of Maria Fiorini Ramirez, Inc., an independent global economic and financial consulting firm. Panelists include Jordan Kotick, Managing Director and Head of Technical Strategy at Barclays Capital; Luz M. Padilla, Senior Portfolio Manager, Emerging Markets Fixed Income, at DoubleLine Capital LLP; and Stephen King, Chief Group Economist and Global Head of Economics and Asset Allocation Research at HSBC Bank PLC.

CFALA’s Kerry Gawne has assumed responsibilities as chairperson of the 2011 Forecast Dinner after being a key member of the event’s committee for the past several years.

“Kerry has done an outstanding job of planning this year’s Forecast Dinner and assembling an impressive set of panelists to comment on the



challenges and opportunities that investors face in today’s increasingly global markets,” said CFALA President George Dennis, who has been chairman since launching the widely followed forecast event nine years ago. “As we enter our 80th year, CFALA continues to be the

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Jordan Kotick



Luz Padilla



Stephen King



Maria Ramirez



Dinner (continued)

premier professional organization for the investment industry in Southern California and a highly respected source of information, as evidenced by the quality of our annual forecast dinners.”

Ms. Ramirez held positions at American Express International Banking Corp., Merrill Lynch, and Drexel Burnham Lambert before founding her own firm, MFR, in 1992. MFR, which has with offices in New York, Miami and San Francisco, is highly regarded for its consistently accurate, unbiased analysis of economic trends and other issues that affect markets and investment decisions. Ms. Ramirez is a frequent speaker at U.S. and international forums, a regular guest on various media outlets, and a director of a diverse group of corporations and not-for-profit organizations.

Based in New York, Kotick is responsible for a global team of Barclays Capital strategists that cover Commodity, Fixed Income,

Foreign Exchange, Equity and Emerging Markets. He is the past President of the Market Technicians Association (MTA) in New York, and the first person to have ever been President of both the MTA and the Canadian Society of Technical Analysts (CSTA). He has his own regular global show/segment on CNBC's Closing Bell with Maria Bartiromo, which is broadcast in the U.S., Europe and Asia.

Ms. Padilla joined DoubleLine in 2009. She previously was a Managing Director at TCW, serving in a number of roles of increasing responsibility, including Credit Analyst, Director of Research, Co-Portfolio Manager, and lead Portfolio Manager. She was involved in all aspects of building and managing TCW's Emerging Markets Fixed Income business, including credit, securitization, trading and marketing. While at TCW, Ms. Padilla managed the Emerging Markets Total Return Strategy. She received her MBA from UC Berkeley, where she was a fellow of the Robert A. Toigo Foundation, and her Bachelor's of Art degree in Economics from Stanford University.

Based in London, King is directly responsible for HSBC's global economic coverage and co-ordinates the research of HSBC economists all over the world. He writes a weekly column for "The Independent", one of the U.K.'s leading newspapers, and appears regularly on both television and radio. He has given written and oral evidence on the economic effects of globalization to the House of Commons Treasury Committee and the House of Lords Economic Affairs Committee. He has also given oral evidence to the House of Lords Committee on U.K. monetary policy. Between 2007-2009, King was a member of the European Central Bank Shadow Council, and most recently became a member of the Financial Times Economist's Forum. His first book, *Losing Control*, which was published earlier this year by Yale University Press, examines the impact of emerging nations on Western economic prosperity. King studied economics and philosophy at Oxford.

The program will begin with cocktails 5 pm, followed by dinner at 6 pm and the panel discussion beginning at 6:30 pm. The Wilshire Grand Los Angeles is located at 930 Wilshire Blvd. in downtown Los Angeles.

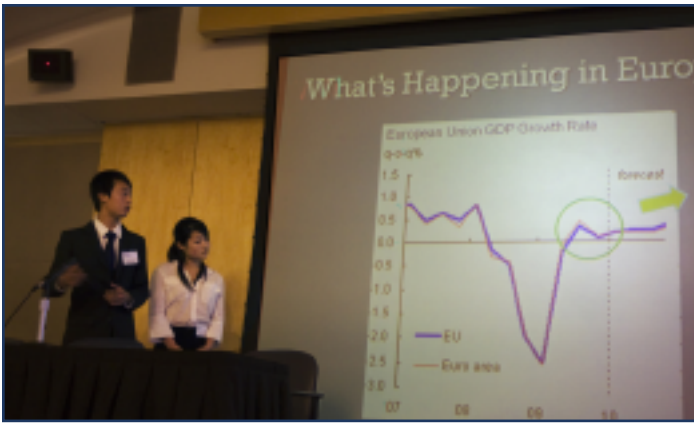
CFALA Experts Are Quick Resources For Reporters MEDIA

CFALA members with expertise in a wide variety of subjects are available to speak with members of the of the Southern California media by going to the experts page of the CFALA news-room.

The CFALA experts list includes respected analysts, portfolio managers and researchers who are willing to respond to reporters on short notice to provide quotes, perspective and useful background information on developing stories.

Among the many topics covered by CFALA

experts are behavioral finance, defined contribution investing, distressed assets investing, U.S. equities, international equities, forensic economic analysis, hedge funds and alternative investments, hedge fund and investment adviser compliance, investing for non-profits, investment management, mortgage and asset-backed securities, mutual fund investing for individuals and 401(k) plans, neuro-economics, retirement plan investing, single stock exposure solutions, valuation for tax and financial reporting, value investing, and wealth management.



International View – Students Richard Cheng and Haley Araki discuss the economic outlook for the European Union, where sovereign debt issues caused market volatility.

CFALA Helps Students Learn About Economics and the Financial Markets

Although CFALA’s primary mission is assuring the highest standards of ethics, education, and professional excellence within the investment industry, the society also works to help those just beginning to learn about how to handle money and investments.

Under a long-standing partnership with the California Council on Economic Education (CCEE), CFALA is a prime sponsor of the Capital Markets Contest, which focuses on economics and the stock market.



Hard Choices - Judges at the Capital Markets Contest evaluated the presenters before deciding on the top three teams.

Now in its eighth year, the Capital Markets Contest promotes interest in economic education, honors high-achieving students and showcases outstanding high school economics programs. About 600 students from through-

out Southern California participated in 2010 contest, forming four-person teams that prepared analyses of current challenges facing economic policymakers. Finalist teams made presentations to a panel of investment industry professionals at Los Angeles branch of the Federal Reserve Bank of San Francisco, with the winning students receiving \$500 each in prize money and a trip to New York City that included visits to the New York Stock Exchange, New York Federal Reserve Bank and headquarters of NASDAQ. Members of the second and third-place teams received cash prizes of \$300 and \$100 each.

“We were delighted with the enthusiasm and skills of these high school students. They are a testament of what economic education can do,” said Dr. Jim Charkins, CCEE Executive Director.



Headed for New York – Former CFALA President Asha Joshi, at left, with members of the winning team: Peter Shao, Haley Araki, Richard Cheng, and Owen Chen of Dos Pueblos High School in Santa Barbara. Next to the students are CCEE Executive Director Jim Charkins and at far right is Roland Lewin, their teacher.

CCEE also operates another innovative program called MoneyWiseTeen that helps students learn fundamental economic principles and apply them to basic financial decisions. More than 40 teachers at schools in Los Angeles County, Orange County and the Inland Empire brought the lessons of MoneyWiseTeen into their classrooms in 2010, developing projects and organizing four-person teams for a final competition. Six teams made it to the finals, each presenting videos, skits, PowerPoint presentations, and even rap songs to illustrate the lessons they learned through the program. Members of the winning teen team, and their teacher, received \$500 each, with \$300 going to the runners-up and \$100 awarded for third place.