



SPONSORSHIP OPPORTUNITIES

**CFA Society Los Angeles 14th Annual
Economic and Investments Forecast Dinner**

January 28, 2016



**CFA Society
Los Angeles**

CFALA 14th Annual Economic and Investments Forecast Dinner

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About CFALA

Established in 1931, CFA Society Los Angeles (CFALA) is a network of over 2,000 investment management and engagement among our members and within our community. Our Annual Economic and Investments Forecast Dinner is the society's premier event, attracting over 350 attendees from our membership and interested investment professionals from throughout southern California.

OMNI LOS ANGELES HOTEL

251 S. Olive St., Los Angeles, CA 90071

5:30 pm Cocktail Hour

6:30 pm Dinner

7:00 pm Panel Discussion

DISCUSSION PANEL

MODERATOR

Jane Wells, *Business News Reporter*, CNBC

PANELISTS

François Trahan, *Partner*, Cornerstone Macro

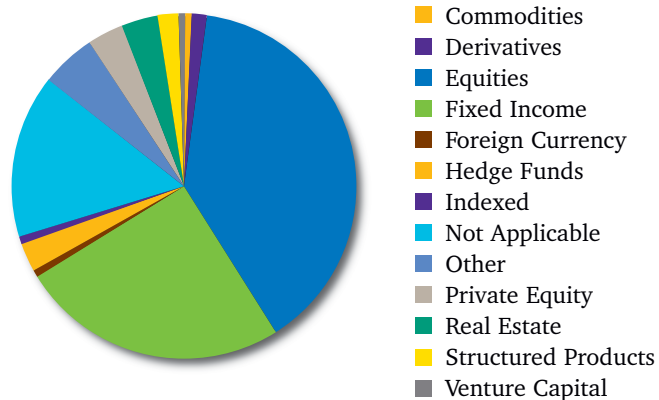
Kim Wallace, *Managing Director*, Renaissance Macro Research

David Mulford, *Vice Chairman*, International, Credit Suisse

CFALA Member Profile

- 91% CFA Charterholders
- 17% Female
- 83% Male
- 44 Average age
- 18 Average years in industry

Primary Investment Practice



Key Benefits

- Maximize exposure at CFA Society Los Angeles' premier event.
- Target your primary audience.
- Generate new leads and prospects to grow your business.
- Network with current clients to enhance your relationships.
- Enhance credibility with a respected organization.
- Build market presence and brand awareness.

DISCUSSION PANEL 2016

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.



François Trahan is an economist by training and is widely praised for his differentiated insights into the dynamics of the markets and his unique understanding of the business cycle. Prior to founding Cornerstone, François was the Vice Chairman and Chief Investment Strategist of Wolfe Trahan & Co. Previously, he was Executive Managing Director and Chief Investment Strategist at ISI Group, as well as head of ISI's Quantitative Research Team. François was formerly with Bear Stearns & Co. where he served as Chief Investment Strategist for four years. Earlier, he worked for Ned Davis Research and the Bank Credit Analyst Research Group.

In 2014, François was voted to *Institutional Investor* magazine's All-American Research Team as the #1 Portfolio Strategist, and has been selected as #1 for eight of the past ten years. Since 2010, he has also been ranked among the top analysts for Quantitative Analysis as well. François received his undergraduate and graduate degrees in economics and econometrics from the University of Montreal.



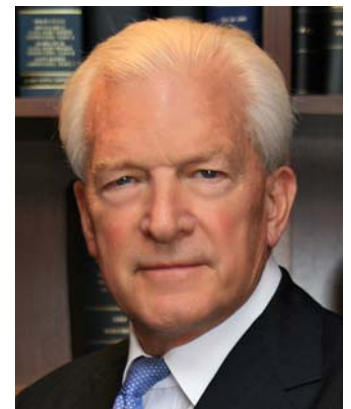
Kim Wallace is Managing Director at Renaissance Macro Research and is responsible for Washington Policy Research. He has enjoyed a 30-year career in policy analysis in state and federal governments and capital markets. Nominated by President Obama in March 2009 and confirmed by the U.S. Senate, Kim most recently served as Treasury Assistant Secretary for Legislative Affairs until October 2011. He is proud to have received the Alexander Hamilton Award from Secretary Timothy Geithner, the highest honor bestowed on Treasury Department officials. Previously, Kim was an analyst and managing director at Lehman Brothers and briefly at Barclays Capital where he analyzed a range of policy developments including deregulation of electricity, telecommunications, and financial markets; built and managed a team dedicated to geopolitical risk analysis; and served as an advisor to Lehman's executive committee. He is a multiple recipient of the Institutional Investor All-American award.

Kim received a Bachelor's Degree from the University of Texas at Austin, and a Master's Degree from the Johns Hopkins University.



Ambassador David Mulford is Vice Chairman International of Credit Suisse, which he rejoined in March of 2009 after spending five years as US Ambassador to India. In 2007 the US Department of State awarded him the Sue M. Cobb Award for Exemplary Diplomatic Service in recognition of his extraordinary efforts as a non-career ambassador in using private sector leadership and management skills to make a significant impact on US-India bilateral relations. Previously, Dr. Mulford served as Chairman International and Member of the Executive Board of Credit Suisse. He has been Under Secretary and Assistant Secretary of the US Treasury for International Affairs; a senior international economic policy official at the Treasury under Secretaries Regan, Baker and Brady; the Managing Director and Head of International Finance at White, Weld & Co., Inc; a senior investment advisor for Saudi Arabian Monetary Agency (SAMA); and a Special Assistant to the Secretary and Deputy Secretary of the Treasury as a White House Fellow.

Dr Mulford received a Doctor of Philosophy degree from Oxford University, an MA in Political Science from Boston University and a BA in Economics, cum laude, from Lawrence University. He did graduate studies at the University of Cape Town, South Africa in 1960 and has published two books on Zambia.



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. 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

Event Sponsor (limit 2)		\$10,000
<ul style="list-style-type: none"> ■ Invitation to attend cocktail reception with Moderator and Panelists ■ Enlarged Front Stage signage, prominently displayed ■ Logo placement on Lobby signage, prominently displayed ■ Logo on “swag” bag ■ Provide an item/handout for “swag” bag 	<ul style="list-style-type: none"> ■ 1-minute commercial to be played during dinner ■ Acknowledgment as an Event Sponsor in a half-page ad in the Dinner Program ■ Premier table location ■ One table at the Premier table location/10 dinner tickets ■ Logo on event registration page and email announcements with hyperlink to your company’s website – if committed by January 8 	
Platinum		\$5,000
<ul style="list-style-type: none"> ■ Front Stage signage ■ Logo placement on Lobby signage ■ Acknowledgment as a Platinum Sponsor in the Dinner Program ■ Provide an item/handout for “swag” bag 	<ul style="list-style-type: none"> ■ Preferred table location ■ One table at the Forecast Dinner/10 dinner tickets ■ Logo on event registration page and email announcements – if committed by January 9 	
DIAMOND DIRECT – Direct tax-deductible donation to the CCEE (limit 4)		\$5,000
<ul style="list-style-type: none"> ■ 501(c) (3) write off ■ Front Stage signage ■ Logo placement on Lobby signage ■ Acknowledgment as a DIAMOND DIRECT Sponsor in the Dinner Program 	<ul style="list-style-type: none"> ■ Provide an item/handout for “swag” bag ■ Preferred table location ■ One table at the Forecast Dinner/10 dinner tickets ■ Company name on event registration page and email announcements 	
Gold		\$3,500
<ul style="list-style-type: none"> ■ Logo placement on Lobby signage ■ Acknowledgment as a Gold Sponsor in the Dinner Program ■ Preferred table location 	<ul style="list-style-type: none"> ■ One table at the Forecast Dinner/10 dinner tickets ■ Company name on event registration page and email announcements 	
Wine Sponsor (Limit 3)		\$2,000
<ul style="list-style-type: none"> ■ Acknowledgment as a Wine Sponsor in the Dinner Program ■ One dinner ticket 	<ul style="list-style-type: none"> ■ Logo placement on Lobby signage ■ Logo placement on wine glass tags ■ Company name on event registration page 	



FUNDRAISING FOR CFALA INVESTMENT LITERACY PROGRAM 2016

For the tenth consecutive year, CFALA is sponsoring a high school student contest in the metropolitan Los Angeles area with California Council on Economic Education (CCEE). We anticipate the participation of 20 high schools in the L.A. region!

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 and collaborate with L.A. area High Schools?

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 and realize that financial careers are indeed possible. Teachers and students alike have shown great enthusiasm for the contests and believe that this is the best way to learn these concepts: through experience.

CFALA members serve as “mentor volunteers” and 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 contest works:

Financial Advisors' 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. Clients are fictitious and represent a range of ages, demographics, experience, and have a range of financial goals depending on their stages of life.
- Portfolios consider criteria, such as: investor goals and objectives, risk tolerance, time horizon and investment instruments.
- Each teacher selects one team to send to CCEE for judging (there may be more than one team per school). Scoring is based on a number of criteria, for example which portfolio had the highest return, which had the highest return with the fewest trades, which had the most suitable investment selections for their investor, etc.
- High-scoring teams move onto the finals and present to a panel of judges, including CFALA members. Grand prizes can include cash gifts, electronics, field trips, etc.

BE A CLASSROOM MENTOR THIS YEAR

Contact volunteer@cfala.org for more information.

CFA Society Los Angeles promotes integrity, professional excellence and engagement among our members and within our community.

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 to learn how this award-winning, nonprofit organization brings economic and personal finance lessons to hundreds of thousands of California students.

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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 655, Los Angeles, CA 90071, **OR register and pay online** at www.cfala.org

Please print or type:

Company _____

Principal Contact Person _____

Address _____

City _____ State _____ Zip _____

Telephone () _____ Fax () _____

Email Address _____

Guest Names

Email Addresses

Guest Names must be submitted by **January 22, 2016**.

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** \$2,000

- Check here if you wish to receive an invoice
- Check here to receive a W-9

FOR SPONSORSHIP INQUIRIES, contact Laura Carney at 213.613.1503, x701, or laura@cfala.org. Sponsorship registration, company logos and specifications must be received by the CFALA Office by **Friday, January 8, 2016**.

Please email logos to 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.

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 _____