



CFA Society
Los Angeles

CFA SOCIETY LOS ANGELES PRESENTS

FIRST WEDNESDAYS

THE WEALTH MANAGEMENT EXCELLENCE SERIES

First Wednesdays: The Wealth Management Excellence Series is designed for thought-leaders in the advisory community who want to bend the curve, not just stay ahead of it. The intent of the program is to learn about and analyze cutting-edge strategies to generate market-leading client results and share the next level of evolution in practice management. Attendees will include C-suite executives of family offices and RIAs, leading financial advisors, investment managers, business managers, and other top private wealth industry professionals.

This 6-part series is designed to address the issues, concerns and interests of wealth management practitioners. Meeting every other month on the first Wednesday from February through December, this highly successful program in Los Angeles will be led by a dynamic team of industry experts. Register for individual sessions or for the entire series. *Don't miss out!*

SCHEDULE OF EVENTS

All events will be held from 4 pm - 7pm

February 8The Next Five Years: Asset Allocation and Portfolio Positioning

Richard Bernstein, CEO, Richard Bernstein Advisors, LLC

April 5Debate on the Merits of Non-Market Cap Weighting

Rob Arnott, Chairman, Research Affiliates

Roger Ibbotson, Zebra Capital Management LLC

June 7Liquidity Events: Understanding and Managing the Private to Public Process

Lee Weinberg, Weinberg Gonser, LLP

August 2Dimensional Fund Advisors: Pursuing Higher Expected Returns in Equities / Advancements in Fixed Income Trading

October 4The War on Tax Inefficiency: Advanced Weaponry (Loss Harvesting, Deferral, Turnover, & Municipal Bonds)

Parametric Portfolio Advisors

Kurt van Kuller, CFA, MUFG Union Bank, N.A.

December 6 . . .State of the Art of Wealth Management Technology

Greg Friedman, Junxture

	Session	Series
Members	\$25	\$100
Non-Members	\$40	\$180

For dates, locations and more information for each topic visit

www.cfala.org



FIRST WEDNESDAYS SPONSORSHIP OPPORTUNITIES

CFALA'S YEAR-LONG WEALTH MANAGEMENT EXCELLENCE SERIES
Join on us every other month on the 1st Wednesday
February – December 2017 | 4 pm - 7 pm

KEY BENEFITS

- Maximize exposure throughout the year-long series
- Target a select, high-value group of industry professionals
- Enhance credibility with a respected organization
- Build market presence and brand awareness
- Firm name/logo included in press release, event program, signage and more
- Promotion to all CFALA members and 15K+ marketing list including: portfolio managers, pension fund advisors, analysts, executives and business owners
- Great networking opportunities

CFALA MEMBER PROFILE

91%	CFA Charterholders
17%	Female
83%	Male
44	Average Age
18	Average years in Industry

Excitement is building amongst our members and constituents as word gets out that CFA Society Los Angeles is continuing its highly successful **Wealth Management Excellence Series** for 2017. Led by a dynamic team of industry experts and senior wealth management professionals, the committee has already put together a list of cutting edge, engaging and educational topics that you can be part of by becoming a sponsor. Heighten the visibility of your company by partnering with CFALA and reaching the audience that you want to reach: C-suite executives of family offices and RIAs, leading financial advisors, investment managers, business managers, and other top private wealth industry professionals.

Series Sponsor | \$2900 (Only 9 available)

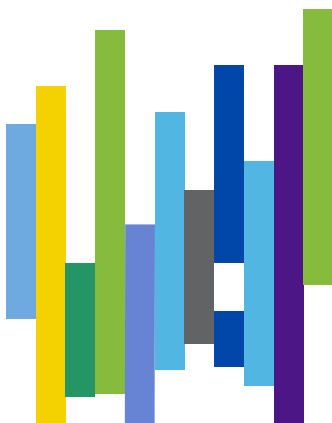
Benefits include: Two tickets to each event (transferable); Sponsor table at each event to highlight 1 piece of your organization's collateral; Opportunity to do a 2-minute introduction of you and your company on your "host date;" Consistent logo visibility on website, online promotions, and signage.

Host Sponsor | in kind contribution by hosting (only 2 available)

If your firm has room for 70 - 100 attendees, host one of the sessions at your firm! Host Sponsors will provide the event venue and light refreshments. Benefits include: Two tickets to each event (transferable and up to five on your host date); Opportunity to do a 2-minute introduction of you and your company on your "host date;" Consistent logo visibility on website, online promotions and signage.

SPONSORSHIPS AVAILABLE

Sponsorship Level	Series	Host
Number Available	9	2



*Don't miss out on this unique opportunity to be part of CFALA's successful Wealth Management Excellence Series. **Contact CFALA for more information.***

CFA Society of Los Angeles | 520 S. Grand Ave. | Ste. 655 | Los Angeles, CA 90071
Laura Carney, Executive Director | laura@cfala.org | 213.613.1503, x701

CFALA presents FIRST WEDNESDAYS, The Wealth Management Excellence Series

SPONSORSHIP REGISTRATION & PAYMENT FORM

Register to be a Sponsor by faxing completed forms to 213.613.1233 or emailing to laura@cfala.org, and mailing payments to 520 South Grand Avenue, Suite 655, Los Angeles, CA 90071. You may also register and pay online at www.cfala.org

Please print or type:

Company _____

Principal Contact Person _____

Address _____

City _____ State _____ Zip _____

Telephone () _____ Fax () _____

Email Address _____

Schedule of Events

Please indicate sessions that you could potentially host or for which you could provide speaker or moderator.

- Feb 8 The Next Five Years: Asset Allocation and Portfolio Positioning**
- Apr 5 Debate on the Merits of Non-Market Cap Weighting**
- Jun 7 Liquidity Events: Understanding and Managing the Private to Public Process**
- Aug 2 Dimensional Fund Advisors: Pursuing Higher Expected Returns in Equities / Advancements in Fixed Income Trading**
- Oct 4 The War on Tax Inefficiency: Advanced Weaponry (Loss Harvesting, Deferral, Turnover, & Municipal Bonds)**
- Dec 6 State of the Art of Wealth Management Technology**

SPONSOR LEVEL

Series Sponsor **\$2,900**

Host Sponsor **In Kind**

Check here if you wish to receive an invoice

Check here to receive a W-9

Visit www.cfala.org to pay online.

FOR SPONSORSHIP INQUIRIES, contact Laura Carney at 213.613.1503, x701, or laura@cfala.org.

Please email logos to laura@cfala.org. Vector files (eps) are preferred, but hi-res (300 dpi) .tif or .jpg are acceptable.