



SPONSORSHIP OPPORTUNITIES

CFA Society Los Angeles 15th Annual
Economic and Investments Forecast Dinner

January 31, 2017



CFA Society
Los Angeles

CFALA 15th Annual Economic and Investments Forecast Dinner

January 31, 2017

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, *Special Correspondent, CNBC*

PANELISTS

Terry Haines, *Sr. Political Strategist, Head of Political Analysis, Managing Director, Evercore ISI*

Dr. David Kelly, *Chief Global Strategist JP Morgan Funds*

David Zervos, *Chief Market Strategist Jeffries LLC; Chief Investment Officer, Jeffries Investment Advisers, Global Macro Division*

CFALA Member Profile

91% CFA Charterholders

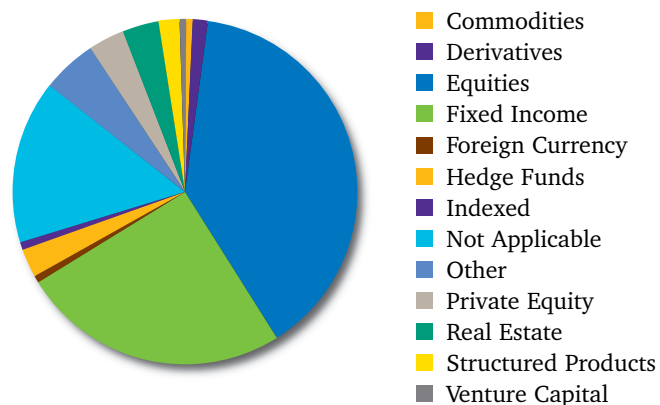
17% Female

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.

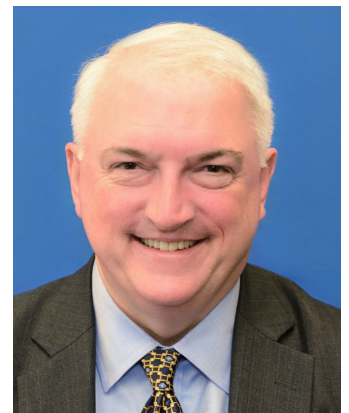
DISCUSSION PANEL 2017

Jane Wells develops features, special reports and series for CNBC and CNBC.com and contributes to CNBC's breaking news coverage. Jane assumed her current role after more than 20 years as a CNBC reporter. Most recently, she covered retail, agriculture and defense as well as reports on California's economy, West Coast real estate and Las Vegas for the network. She joined CNBC in 1996, providing special coverage of the O.J. Simpson civil case for "Rivera Live" and has also served as a senior correspondent for CNBC's "Upfront Tonight." 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.



Terry Haines is Senior Political Strategist, Head of Political Analysis, and a Managing Director at Evercore ISI. Previously, Terry was a senior adviser in Congress and prior presidential Administrations, and a partner in major law firms and government relations companies. His public sector experience includes service as Chief Counsel and Staff Director of the US House Committee on Financial Services, where he helped enact many landmark laws including the USA PATRIOT Act, Sarbanes-Oxley, and the federal terrorism insurance backstop known as TRIA. Terry also served as Senior Counsel to the US House Energy and Commerce Committee, which oversees policy governing most regulated industries. Finally, Terry was Chief of Staff and White House liaison at the Federal Communications Commission, where he spearheaded telecom deregulation, mobile phone competition, and the digital television (HDTV) rollout. In the private sector, Terry was a partner in two top 100 US law firms and two government relations companies, representing Fortune 500 clients in financial services, telecom, tax, high tech, and many other industry sectors. Terry is a frequent media commentator on US and international policy and political issues. He serves on the board of Bridgeway Capital, Southwestern Pennsylvania's largest nonprofit lender to entrepreneurs for economic development.



Dr. David Kelly is the Chief Global Strategist and Head of the Global Market Insights Strategy Team for J.P. Morgan Funds. With over 20 years of experience, David provides valuable insight and perspective on the economy and markets to thousands of financial advisors and their clients. Throughout his career, David has developed a unique ability to explain complex economic and market issues in a language that financial advisors can use to communicate to their clients. He is a keynote speaker at many national investment conferences, a frequent guest on CNBC and other financial news outlets, and is widely quoted in the financial press. Prior to joining J.P. Morgan Funds, David served as Economic Advisor to Putnam Investments. He has also served as a senior strategist/economist at SPP Investment Management, Primark Decision Economics, Lehman Brothers and DRI/McGraw-Hill. David is a CFA charterholder. He also has an Ph.D and M.A. in Economics from Michigan State University and a B.A. in Economics from University College Dublin in the Republic of Ireland.



David Zervos is Chief Market Strategist of Jefferies LLC and Chief Investment Officer of the Global Macro Division of Jefferies Investment Advisers. David is best known across the financial services industry for his timely, insightful macroeconomic commentary and viewpoints. In his role as Chief Market Strategist he exchanges ideas with the world's leading money managers, hedge funds, pension funds and sovereign wealth funds. He appears regularly in financial media and is a frequent speaker at key industry conferences and events. David joined Jefferies in 2010 after spending 2009 as a visiting advisor in the Division of Monetary Affairs at the Board of Governors of the Federal Reserve System in Washington, D.C. Prior to visiting the Federal Reserve, he held a variety of research, sales and trading positions in the private sector, most recently managing global macro portfolios for Brevan Howard and UBS O'Connor. He began his career as an economist at the Federal Reserve Board in the early 1990's. He received a B.Sc. in Systems Engineering from Washington University, and an M.A. and Ph.D. in economics from the University of Rochester.



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 ■ 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 6
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 6
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 & Spirits Sponsor (Limit 3) \$2,000	
<ul style="list-style-type: none"> ■ Acknowledgment as a Wine & Spirits 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 & cocktail napkins ■ Company name on event registration page



FUNDRAISING FOR CFALA INVESTMENT LITERACY PROGRAM 2017

For the 11th 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 40 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:

- 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 info@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

_____	_____
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Guest Names must be submitted by **January 24, 2017**.

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
- ☐ **DIAMOND/DIRECT** \$5,000
Checks only, payable to
"California Council on Economic Education"
- ☐ **Gold** \$3,500
- ☐ **Wine & Spirits Sponsor** \$2,000

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

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. Sponsorship registration, company logos and specifications must be received by the CFALA Office by **Friday, January 6, 2017**.

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.