



SPONSORSHIP OPPORTUNITIES

CFA Society Los Angeles 19th Annual
Economic and Investments Forecast Dinner

February 2, 2023

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About CFALA

Established in 1931, CFA Society Los Angeles (CFALA) is a network of over 2,400 investment management professionals in the greater Los Angeles area. CFALA's mission is to promote integrity, professional excellence and engagement among our members and within our community. Our Annual Economic and Investments Forecast Dinner is one of our society's signature events, attracting members of the investment community from throughout southern California.

OMNI LOS ANGELES HOTEL

251 S. Olive St., Los Angeles, CA 90012

5:30 pm Cocktail Hour

6:30 pm Dinner

7:00 pm Panel Discussion

DISCUSSION PANEL

MODERATOR

Jane Wells, *Special Correspondent, CNBC*

PANELISTS

Victoria L. Fernandez, CFA,
Chief Market Strategist
Crossmark Global Investments

Jitania Kandhari, *Deputy CIO, Solutions Management Group; Head, Macro and Thematic Research for Emerging Markets Equity, Morgan Stanley*

Jill Carey Hall, CFA,
Managing Director and Head,
U.S. Small and Mid-Cap Strategy
BofA Global Research

Michael Hasenstab, Ph.D.,
Executive VP and CIO
Templeton Global Macro

CFALA Member Profile

95% CFA Charterholders

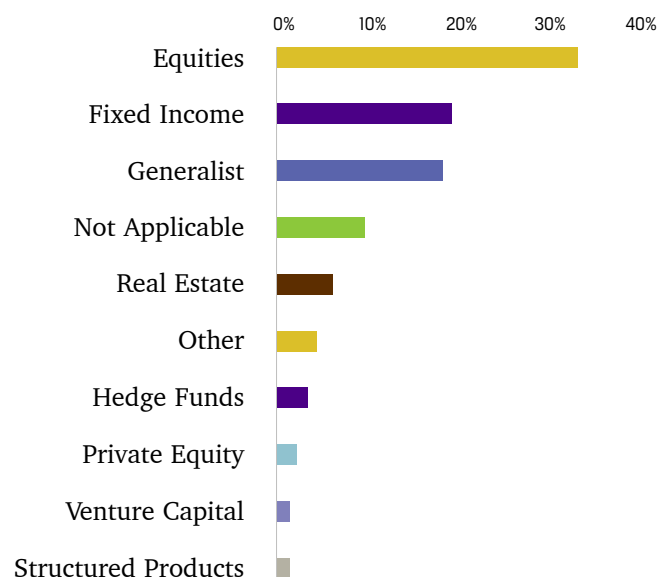
18% Female

82% Male

47 Average age

CFALA Primary Investment Practice

As of May 31, 2022



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.
- Raise your logo visibility to our 30K+ footprint.

DISCUSSION PANEL 2020

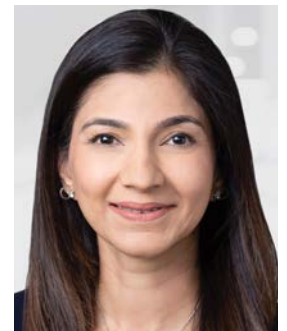
Jane Wells is an award-winning broadcast journalist with over 30 years experience in the news media. She's covered everything from earthquakes to riots, from the O.J. Simpson trials to Mother Teresa's funeral, from the massacre at Columbine to the 2008 financial collapse. She has questioned CEOs about poor business decisions, posed as a prostitute for a story on AIDS, appeared in the "Seinfeld" finale, and even visited a group of professional cuddlers to see if the business was legit (it is). She is a Special Correspondent for CNBC, where she has worked for over 20 years. Jane also writes "Wells \$treet," a snarky take on the business world, for Meta's Bulletin platform.



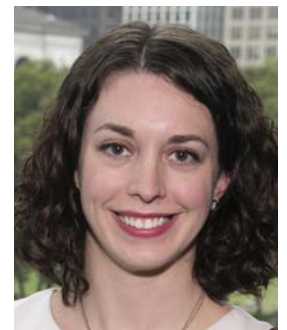
Victoria L. Fernandez, CFA, joined Crossmark Global Investments in July 2012 and serves as Chief Market Strategist. She works with the firm's executive and research teams to analyze current market trends and provide comments to the media and public around Crossmark's investment outlook. She is also responsible for managing the Crossmark Fixed Income Investment team and Marketing division while serving as Portfolio Manager for taxable fixed income products. Victoria began her career in 1994 at Faye Sarofim & Company, a Houston-based financial advisory firm. During her 18 years at the firm, Victoria enhanced her knowledge of the industry through a variety of roles within the fixed income division, including Head Trader, Municipal Portfolio Manager, and as an Associate on the management team. Born and raised in Houston, Texas, Victoria earned her Bachelor of Arts from Rice University. She earned her MBA from the May's Business School at Texas A&M University and is a CFA® Charterholder.



Jitania Kandhari is Deputy CIO of the Solutions and Multi-Asset Group, Co-Lead Portfolio Manager for the Active International Allocation Strategy and Head of Macro and Thematic Research for the Emerging Markets Equity team at Morgan Stanley. She joined Morgan Stanley in 2006 and has 24 years of investment experience in global macro economics, country and market analytics, currencies and thematic investments. Recently Jitania was named in Citywire's Top 20 female portfolio managers in the US for 2021. Prior to joining the firm, Jitania was an associate Vice President in private banking at ABN Amro (Royal Bank of Scotland). Jitania began her career in India at First Global Securities in Indian equities and then joined the securities broking and investment banking at Kotak Securities in equity research and sales. She holds a Bachelor of Commerce degree in advanced financial and management accounting and an M.M.S. in finance, both from the University of Mumbai.



Jill Carey Hall, CFA, is managing director and head of U.S. Small and Mid-Cap Strategy who joined BofA Global Research in 2009. As a senior U.S. Equity Strategist, she works closely with Savita Subramanian in determining forecasts for the S&P 500, recommending sector allocations for U.S. equities and publishing thematic reports. Jill also authors a proprietary analysis of BofA equity client flow trends and leads the firm's Global Research U.S. small and mid-cap strategy work. Jill has been quoted in various financial news publications including the *Wall Street Journal* and *Financial Times* and is a frequent guest on CNBC and Bloomberg TV. She was named Bank of America's 2016 "Rising Star" within Global Banking and Markets, an award given annually by the Women's Bond Club to recognize aspiring leaders on Wall Street. She has a bachelor's degree in economics and business and a bachelor's degree in English from Lafayette College. She is a CFA charterholder.



Michael Hasenstab, Ph.D., is executive vice president and chief investment officer for Templeton Global Macro, which offers global, unconstrained fixed interest investment strategies through a variety of investment vehicles. Michael is a portfolio manager for a number of funds. He is also economic advisor to the CEO of Franklin Resources, Inc. and a member of Franklin Resources' executive committee. Michael and his team have received numerous industry awards and accolades through his investment career. The funds that he and his team manage have collectively received more than 400 awards. He has worked and traveled extensively abroad, with a special focus on Asia. Michael holds a Ph.D. in Economics and a master's degree in Economics of Development, both from the Australian National University, and a B.A. in International Relations/Political Economy from Carleton College in the United States.



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 25% of the net proceeds of the Event Sponsor, Platinum and Gold categories towards its financial literacy partner, the California Council on Economic Education. For those so inclined, CFALA can arrange for a tax-deductible contribution directly to the California Council on Economic Education, 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 ■ 1-minute commercial to be played during dinner 	<ul style="list-style-type: none"> ■ Acknowledged as an Event Sponsor in a half-page ad in the dinner program ■ Premier table location ■ One table at the Premier table location/8 dinner tickets ■ Logo on event registration page and email announcements with hyperlink to your company's website – if committed by January 1st. 	
Platinum		\$5,000
<ul style="list-style-type: none"> ■ Front Stage signage ■ Logo placement on Lobby signage ■ Acknowledged as a Platinum Sponsor in the dinner program 	<ul style="list-style-type: none"> ■ Preferred table location ■ One table at the Forecast Dinner/8 dinner tickets ■ Logo on event registration page and email announcements – if committed by January 1st 	
DIAMOND DIRECT – Direct tax-deductible donation to the California Council on Economic Education (limit 2)		\$5,000
<ul style="list-style-type: none"> ■ 501(c)(3) write off ■ Front Stage signage ■ Logo placement on Lobby signage ■ Acknowledged as a Diamond Direct Sponsor in the dinner program 	<ul style="list-style-type: none"> ■ Preferred table location ■ One table at the Forecast Dinner/8 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 ■ Acknowledged as a Wine & Spirits Sponsor in the dinner program ■ Preferred table location 	<ul style="list-style-type: none"> ■ One table at the Forecast Dinner/8 dinner tickets ■ Company name on event registration page and email announcements 	
Wine & Spirits Sponsor (Limit 3)		\$2,000
<ul style="list-style-type: none"> ■ One dinner ticket ■ Logo placement on Lobby signage 	<ul style="list-style-type: none"> ■ Logo placement on wine glass tags ■ Company name on event registration page 	

SPONSORSHIP REGISTRATION & PAYMENT FORM

Register to be a Sponsor by emailing completed forms to info@cfala.org and mailing payments to 13400 Riverside Drive, Suite 215, Sherman Oaks, CA 91423, **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 must be submitted by **January 26, 2023**. By listing an email address you are agreeing to give CFALA permission to release the above names and email addresses to the speakers and sponsors, if requested.

Guest Name	Designation	Company	Email Address	Check for Vegetarian Meal
_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	<input type="checkbox"/>

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 (8 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, x1, or laura@cfala.org. Sponsorship registration, company logos and specifications must be received by the CFALA Office by **Monday, January 9, 2023**.

Please email logos to info@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.