



SPONSORSHIP OPPORTUNITIES

CFA Society Los Angeles 17th Annual
Economic and Investments Forecast Dinner

January 23, 2019

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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 400 attendees from our membership and interested investment professionals from throughout southern California.

MILLENNIUM BILTMORE HOTEL

506 S. Grand Ave., 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

Michelle Girard, *Managing Director and Chief U.S. Economist, NatWest Markets*

James Bianco, *CMT, President, Bianco Research*

Julian Emanuel, *Managing Director, Chief Equity & Derivatives Strategist, BTIG*

CFALA Member Profile

91% CFA Charterholders

18% Female

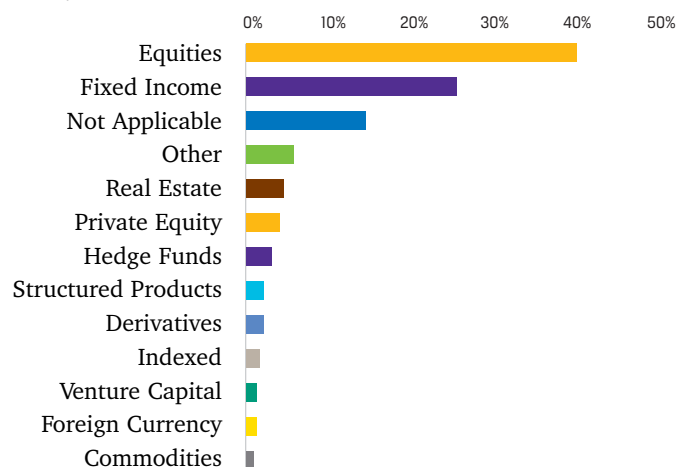
82% Male

44 Average age

18 Average years in industry

Primary Investment Practice

As of April 30, 2017



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 2019

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.

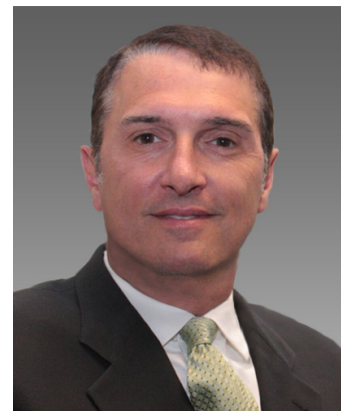


Michelle Girard is the Chief US Economist and a Managing Director for NatWest Markets (NWM). Overseeing the US Economics team, Michelle evaluates and identifies trends across all sectors of the US economy, utilizing econometric models to predict key economic indicators. She is responsible for developing forecasts for growth, inflation and interest rates, and monitoring Federal Reserve and Treasury actions. While coordinating and collaborating with economists and strategists in London and Singapore, Michelle provides synergistic analysis for NWM's global customer base and keeps the firm's sales and trading desks up-to-date on market moving developments. Michelle is a regular speaker and commentator on the US economic outlook on various print, radio, and television news media including CNBC, Fox Business Network, Bloomberg TV & Radio, and Yahoo! Finance.

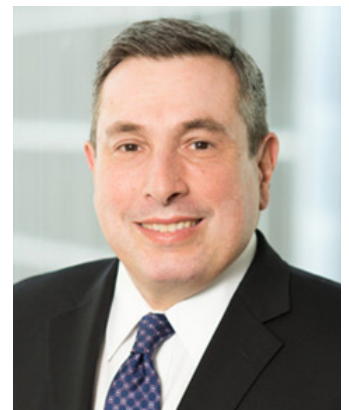
As a member of the US Management Committee, Michelle works with other senior leaders to set and implement business strategy in the region. She is also an Executive Sponsor for the NWM Women's Network and has taken an active role in helping to create and strengthen the talent development offerings for women across the organization. Michelle received a MA & BS (magna cum laude) from Miami University, Ohio.



James Bianco is President and Macro Strategist at Bianco Research, L.L.C. Since 1990, James' commentaries have offered a unique perspective on the global economy and financial markets. Unencumbered by the biases of traditional Wall Street research, he has built a decades long reputation for objective, incisive commentary that challenges consensus thinking. In nearly 20 years at Bianco Research, James' wide ranging commentaries have addressed monetary policy, the intersection of markets and politics, the role of government in the economy, fund flows and positioning in financial markets. James appears regularly on CNBC, Bloomberg and Fox Business, and is often featured in the Wall Street Journal, Bloomberg News, Grants Interest Rate Observer, and MarketWatch. Prior to joining Arbor and Bianco Research, Jim was a Market Strategist in equity and fixed income research at UBS Securities and Equity Technical Analyst at First Boston and Shearson Lehman Brothers. He is a Chartered Market Technician (CMT) and a member of the Market Technicians Association (MTA). Jim has a Bachelor of Science degree in Finance from Marquette University (1984) and an MBA from Fordham University (1989).



Julian Emanuel is a Managing Director and Chief Equity and Derivatives Strategist at BTIG. He provides top-down analysis of broad market trends, sectors, valuation and volatility with a focus on U.S. equity markets and U.S.-listed derivatives. Prior to BTIG, Mr. Emanuel was Head of U.S. Equity and Derivatives Strategy at UBS. Previously, he accumulated over two decades of experience as a Portfolio Manager, Risk Manager and Proprietary Trader with Tiedemann Investment Group, Goldman Sachs, Spear, Leeds & Kellogg, and Credit Suisse Asset Management. Earlier in his career, Julian was also Head of North American Equity Derivatives Sales at Tullett Prebon. He began his career as a floor options trader with Timber Hill Inc. Julian earned a BBA from Emory University and an MBA from New York University's Stern School of Business.



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 4
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 4
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 2019

For the 13th 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.
- High-scoring teams move onto the finals and present to a panel of judges, including CFALA members. 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. 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 16, 2019**.

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 4, 2019**.

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.