



# SPONSORSHIP OPPORTUNITIES

CFA Society Los Angeles 18th Annual  
Economic and Investments Forecast Dinner

January 30, 2020

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## About CFALA

Established in 1931, CFA Society Los Angeles (CFALA) is a network of over 2,000 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 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

Heather Brilliant, *CFA, CEO,*  
Diamond Hill Capital Management

Sonal Desai, *PhD, Executive VP and CIO,*  
Fixed Income Group, Franklin Templeton

Matt Miller, *Political Economist &*  
*Corporate Affairs Advisor,, Capital Group*

### CFALA Member Profile

95% ..... CFA Charterholders

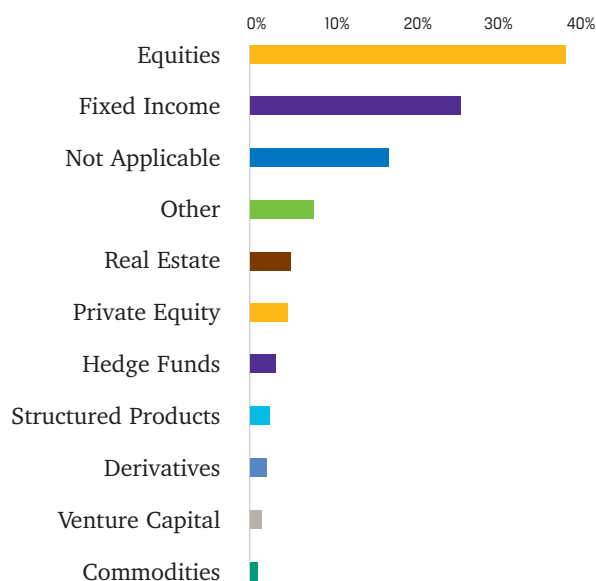
18% ..... Female

82% ..... Male

47 ..... Average age

## CFALA Primary Investment Practice

As of May 31, 2019



## 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 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 trial to Mother Teresa's funeral, from the massacre at Columbine to the 2008 financial collapse. She has questioned CEOs about poor business decisions, driven a bulldozer on live television, posed as a prostitute for a story on AIDS, appeared in the "Seinfeld" finale, and even got a hangover – on purpose – to test out the best cures.

Wells has won a Peabody and DuPont award for her part in KTTV's live coverage of the Rodney King trial, along with several local news Emmys. In 2000, she transitioned from a career in general news to covering business and the markets for CNBC.

These days Jane remains a CNBC Special Correspondent, where she works on breaking news and special on-air stories. She is also the reporter for CNBC.com's "Strange Success" franchise, and she regularly fills in at KFIAM640, the highest rated talk radio station in the west. In her free time, she produces story-telling promotional videos for non-profits like the Salvation Army.



**Heather Brilliant**, CFA, serves as President and CEO for Diamond Hill Capital Management, Inc. Located in Columbus, Ohio, it is an investment management firm with \$22 billion assets under management as of September 30, 2019. Prior to Diamond Hill, Heather was CEO, Americas for First State Investments. From 2014 to 2017, she was CEO of Morningstar Australasia, where she led a team of approximately 150 financial services professionals based in Australia and New Zealand. Before assuming this role in 2014, Heather was Global Director of Equity and Corporate Credit Research at Morningstar for seven years. Before joining Morningstar in 2003, Heather spent several years as an equity research analyst for boutique investment firms. She has covered a variety of sectors, including pharmaceuticals, biotechnology, business services, and retail.

Heather has a Bachelor of Science in Economics from Northwestern University and a Master of Business Administration from the University of Chicago Booth School of Business. She also holds the Chartered Financial Analyst® designation and serves on the CFA Institute Board of Governors. She is the immediate past chair of the CFA Institute Board of Governors and is a past chair of the CFA Society of Chicago.



**Sonal Desai**, Ph.D., is Executive Vice President and Chief Investment Officer of the Franklin Templeton Fixed Income Group where she oversees Franklin's Municipal, Corporate Credit, Floating Rate Securitized, Multisector, Global (including Emerging Markets), Money Market, and Local Asset Management Fixed Income teams, and co-chairs the Group's Fixed Income Policy Committee. Sonal is a member of Franklin Resources Executive Committee, a small group of the company's top leaders responsible for shaping the firm's overall strategy. In addition, she serves on the firm's Management and Investment Committees. She is also a portfolio manager for a number of strategies, including Core Plus, Strategic Income, Low Duration, Global Absolute Return, and Global Fixed income. Sonal joined Franklin Templeton Investments in 2009 from Thames River Capital in London. Previous to her current role, she served as a portfolio manager with Dr. Michael Hasenstab for the flagship Templeton Global Bond and Templeton Global Return strategies, as well as Director of Research for Templeton Global Macro. Sonal holds a Ph.D. in economics from Northwestern University and a B.A. in economics from Delhi University. She was part of the Templeton Global Bond Fund portfolio management team named *Morningstar's* Fixed Income Manager of the Year in Canada in 2013.



**Matt Miller** Matt Miller is a political economist and corporate affairs advisor at Capital Group where his duties include analyzing U.S. policy trends that affect investment decisions, and supporting Capital's communication and engagement efforts with a wide range of external audiences. He hosts the firm's new podcast, "Capital Ideas," which features a blend of long-term investment insights from Capital's team, and conversations with top authors and thinkers relevant to global finance. Prior to joining Capital, Matt was a senior advisor at McKinsey & Company. Before that, he served as a senior advisor in the White House Office of Management and Budget and was a White House Fellow serving as a special assistant to the Federal Communications Commission chairman. He was also a columnist for *The Washington Post*; the host of public radio's "Left, Right & Center" program; and a senior fellow at the Center for American Progress. He has authored two books on public policy – *The Two-Percent Solution: Fixing America's Problems in Ways Liberals and Conservatives Can Love* and *The Tyranny of Dead Ideas* – and has contributed to *Fortune*, *Time*, *The New Republic* and various other national publications. He holds a law degree from Columbia Law School, where he was a James Kent scholar, and a bachelor's degree in economics from Brown University, graduating *magna cum laude*. Matt is based in Los Angeles.



# 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, Junior Achievement of Southern California. For those so inclined, CFALA can arrange for a tax-deductible contribution directly to Junior Achievement of Southern California, a 501(c)(3) charitable organization. Please ask about the Diamond Direct donation.

## Sponsorship Categories

<b>Event Sponsor (limit 2)</b>		<b>\$10,000</b>
<ul style="list-style-type: none"><li>■ Invitation to attend cocktail reception with Moderator and Panelists</li><li>■ Enlarged Front Stage signage, prominently displayed</li><li>■ Logo placement on Lobby signage, prominently displayed</li><li>■ 1-minute commercial to be played during dinner</li></ul>		<ul style="list-style-type: none"><li>■ Acknowledgment as an Event Sponsor in a half-page ad in the Dinner Program</li><li>■ Premier table location</li><li>■ One table at the Premier table location/10 dinner tickets</li><li>■ Logo on event registration page and email announcements with hyperlink to your company's website – if committed by January 11</li></ul>
<b>Platinum</b>		<b>\$5,000</b>
<ul style="list-style-type: none"><li>■ Front Stage signage</li><li>■ Logo placement on Lobby signage</li><li>■ Acknowledgment as a Platinum Sponsor in the Dinner Program</li></ul>		<ul style="list-style-type: none"><li>■ Preferred table location</li><li>■ One table at the Forecast Dinner/10 dinner tickets</li><li>■ Logo on event registration page and email announcements – if committed by January 11</li></ul>
<b>DIAMOND DIRECT – Direct tax-deductible donation to Junior Achievement of Southern California (limit 2)</b>		<b>\$5,000</b>
<ul style="list-style-type: none"><li>■ 501(c)(3) write off</li><li>■ Front Stage signage</li><li>■ Logo placement on Lobby signage</li><li>■ Acknowledgment as a DIAMOND DIRECT Sponsor in the Dinner Program</li></ul>		<ul style="list-style-type: none"><li>■ Preferred table location</li><li>■ One table at the Forecast Dinner/10 dinner tickets</li><li>■ Company name on event registration page and email announcements</li></ul>
<b>Gold</b>		<b>\$3,500</b>
<ul style="list-style-type: none"><li>■ Logo placement on Lobby signage</li><li>■ Acknowledgment as a Gold Sponsor in the Dinner Program</li><li>■ Preferred table location</li></ul>		<ul style="list-style-type: none"><li>■ One table at the Forecast Dinner/10 dinner tickets</li><li>■ Company name on event registration page and email announcements</li></ul>
<b>Wine &amp; Spirits Sponsor (Limit 3)</b>		<b>\$2,000</b>
<ul style="list-style-type: none"><li>■ Acknowledgment as a Wine &amp; Spirits Sponsor in the Dinner Program</li><li>■ One dinner ticket</li></ul>		<ul style="list-style-type: none"><li>■ Logo placement on Lobby signage</li><li>■ Logo placement on wine glass tags &amp; cocktail napkins</li><li>■ Company name on event registration page</li></ul>





## FUNDRAISING FOR CFALA INVESTMENT LITERACY PROGRAM 2020

In 2020, CFA Society Los Angeles (CFALA) will sponsor students to attend Junior Achievement's JA Finance Park and organize a volunteer effort amongst CFALA members to lend a helping hand to students at JASoCal. In the 2018-2019 school year, JA Finance Park was visited by more than 6,000 students!

JA Finance Park is a financial literacy program that introduces personal financial planning and career exploration to 7th to 12th grade students. The program culminates in a day-long simulation at the JA Finance Park site, which provides students a fully immersive experience of personal finance in a real-life setting of stores, shops, and financial institutions.

CFALA volunteers will lead students through a day-long process of budgeting for their assigned fictional family and life situation, guiding them through visits to branded storefronts to do research, make purchases, and conduct other financial transactions.

The goal of JA Finance Park is to provide students with the skills necessary to successfully navigate our complex economic environment. With practical experience managing finances and the tools to continue to develop financial acumen, students will discover how decisions today can impact tomorrow.

CFALA is proud to sponsor Junior Achievement's Finance Park program and work towards encouraging financial literacy and education at the middle and high school level.

### Volunteer @ JA Finance Park

Contact [info@cfala.org](mailto:info@cfala.org) for more information.

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

Junior Achievement's mission is to inspire and prepare young people to succeed in a global economy. We focus on the 3 education pillars of financial literacy entrepreneurship and work readiness.

# 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](http://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 23, 2020**. 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.

<i>Guest Name</i>	<i>Designation</i>	<i>Company</i>	<i>Email Address</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
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_____	_____	_____	_____

## SPONSOR LEVEL

- ☐ **Event Sponsor** ..... \$10,000
- ☐ **Platinum** ..... \$5,000
- ☐ **DIAMOND/DIRECT** ..... \$5,000  
Checks only, payable to "Junior Achievement of Southern California"
- ☐ **Gold** ..... \$3,500
- ☐ **Wine & Spirits Sponsor** ..... \$2,000

**FOR SPONSORSHIP INQUIRIES**, contact Laura Carney at 213.613.1503, x701, or [laura@cfala.org](mailto:laura@cfala.org). Sponsorship registration, company logos and specifications must be received by the CFALA Office by **Friday, January 11, 2020**.

Please email logos to [laura@cfala.org](mailto: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.

- ☐ 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 \_\_\_\_\_