



SPONSORSHIP OPPORTUNITIES

**CFA Society Los Angeles 13th Annual
Economic and Investments Forecast Dinner**

January 29, 2015



**CFA Society
Los Angeles**

CFALA 13th Annual Economic and Investments Forecast Dinner

January 29, 2015

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, *Business News Reporter*, CNBC

PANELISTS

David Malpass, *President*, Encima Global

Krishna Guha, *Vice Chairman*
ISI International Strategy & Investment

Roger Diwan, *Vice President*
IHS Financial Services

CFALA Member Profile

91% CFA Charterholders

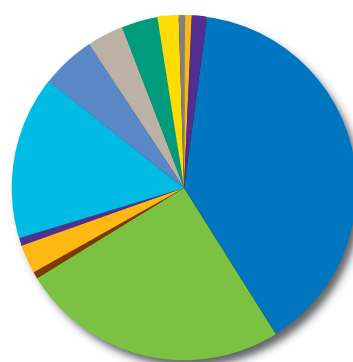
17% Female

80% Male

44 Average age

18 Average years in industry

Primary Investment Practice



- Commodities
- Derivatives
- Equities
- Fixed Income
- Foreign Currency
- Hedge Funds
- Indexed
- Not Applicable
- Other
- Private Equity
- Real Estate
- Structured Products
- Venture Capital

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 2015

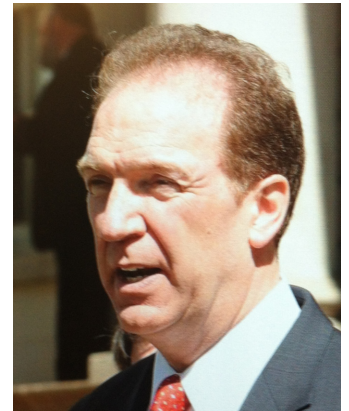
Jane Wells, CNBC business news reporter, is based in Los Angeles, where she covers retail, agriculture and defense as well as reports on California's economy, West Coast real estate and Las Vegas. Jane also writes the blog *Funny Business* for CNBC.com covering a variety of unusual items. She came from CNBC's "Upfront Tonight," where she served as a senior correspondent.

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.



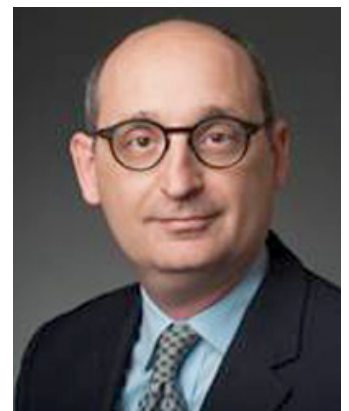
David Malpass is president of Encima Global, an economic research and consulting firm serving institutional investors and corporate clients. Formerly Bear Stearns' chief economist, David's work provides insight and analysis on global economic and political trends, with investment research spanning equities, fixed income, commodities and currencies. A frequent public speaker and television guest, David authors a Current Events column in *Forbes* magazine, and his opinion pieces appear regularly in the *Wall Street Journal*. David held senior economic appointments during the Reagan and Bush Administrations. He was Deputy Assistant Treasury Secretary for Developing Nations, a Deputy Assistant Secretary of State and Senior Analyst for Taxes and Trade at the Senate Budget Committee. He worked on an array of issues including the 1986 tax cut, several congressional budget resolutions, the Gramm-Rudman budget law, the savings and loan bailout, NAFTA, the Brady plan for developing country debt, and fast-track trade authority. He was a member of the government's Senior Executive Service and testified frequently before Congress. David received a bachelor's degree in physics from Colorado College and an MBA from the University of Denver. He studied international economics at Georgetown University's School of Foreign Service, and speaks Spanish, French, and Russian.



Krishna Guha is Vice Chairman, a member of ISI's Management Committee, and heads ISI's Global Policy & Central Bank Strategy Research Team. ISI's Washington office is ranked on the *Institutional Investor's* All-Star Team for Washington research, which is based on a survey of money managers. Prior to joining ISI in 2013, Krishna served as Executive Vice-President, Member of the Management Committee and Head of the Communications Group at the New York Fed. Before joining the New York Fed, he was a senior writer on global economics and economic policy at the *Financial Times*. Krishna was awarded the Best in Business award by the Society of American Business Editors and Writers and the Excellence in Financial Journalism award by the New York State Society of Certified Public Accountants for his work on the financial crisis. He has served as a member of the World Economic Forum's Global Advisory Council, a member of the EU-Japan Council and a fellow at Japan's Keizai Koho Center and Nihon Shinbun Kyokai. Krishna was educated at Cambridge University, UK, and the Kennedy School of Government at Harvard University, where he was a Fulbright Scholar and won the C.V. Starr award.



Roger Diwan is Vice President of IHS Financial Services and leads the team that provides integrated energy analysis to asset managers and private equity investors. Roger joins IHS from PFC, where he served as Partner at PFC Energy, responsible for financial service clients. He has over 20 years of experience in advising oil and gas companies and financial institutions on oil markets, geopolitics of oil, and assessment of the strategic shifts of the global oil and gas industry. Roger has created customized advisory services to help financial sector clients understand the macro environment for commodities, key trends in all segments of the oil and gas industry, and company strategies and assets. From 1998 to 2005, he was Managing Director of the Markets and Countries department for PFC, leading the company's oil market analysis and country risk teams. From 1996 to 2005, he led the Market Analysis team and practice at PFC Energy, where he focused on the physical and paper fundamentals of the oil market. Roger holds a Bachelor of Arts from the Sorbonne University and master's degrees from the The Johns Hopkins University School of Advanced International Studies and the Institut d'Etudes Politiques of Paris.



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	<ul style="list-style-type: none">■ 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 9
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	<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 9
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
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">■ Preferred table location■ One table at the Forecast Dinner/10 dinner tickets■ Company name on event registration page and email announcements
Wine Sponsor (Limit 3)	\$2,000
<ul style="list-style-type: none">■ Acknowledgment as a Wine 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■ Company name on event registration page



FUNDRAISING FOR CFALA INVESTMENT LITERACY PROGRAM 2015

For the tenth 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 20 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:

- Students participate in the 10-week, in-class stock market simulation game.
- 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.

