



CFALA 11th Annual
Economic and Investments Forecast Dinner
SPONSORSHIP OPPORTUNITIES

January 30, 2013



**CFA Society
Los Angeles**

CFALA 11th Annual Economic and Investments Forecast Dinner

January 30, 2013

OMNI HOTEL ■ 251 South Olive, Los Angeles, CA

5:30 pm Cocktail Hour

6:30 pm Dinner

7:00 pm Panel Discussion

DISCUSSION PANEL

Moderator, TBA

Jeffrey Rosenberg, CFA, Managing Director,
BlackRock, Inc.

Shelby Notkin, Chairman
Capital Group Private Client Services

Andrew Spence, Managing Director
OMERS Capital Markets

DISCUSSION PANEL 2013

Moderator TBA

Shelby Notkin is Chairman of Capital Group Private Client Services (CGPCS). He serves as a U.S., Non-U.S. and Global Equity portfolio manager and is Chairman of the CGPCS Investment and Management Committees. In addition, Shelby is Senior Vice President of Capital Guardian Trust Company, Senior Vice President of the Capital Private Client Services Funds and a former member of the Capital Guardian Trust Company Board. Prior to joining CGPCS in 1993, he spent 18 years with Morgan Stanley where he established its presence on the West Coast. Prior to that, he was with E.F. Hutton in New York City. Shelby is a member of the CFA Society of San Francisco, having served as a director and program chairman for four years, and is on the boards of the St. Johns Hospital Foundation, The Music Center of Los Angeles, and the UCLA Anderson School of Management. He earned a BS in accounting and finance from Syracuse University and is based in our West Los Angeles office.



Jeffrey Rosenberg, CFA, Managing Director, is BlackRock's Chief Investment Strategist for Fixed Income where his responsibilities include developing BlackRock's strategic and tactical views on sector allocation within fixed income, currencies and commodities.

Prior to joining BlackRock, Jeff spent nearly 10 years at Bank of America Merrill Lynch as the Chief Credit Strategist. His most recent role included coordination of strategy across all Fixed Income, Securitized Assets, Credit, FX and Commodities and formulating tactical and strategic risk-taking recommendations for external clients and internal trading desks. At BAML, he and his team were consistently ranked in the top Institutional Investor High Grade Strategy teams and General and High Yield Strategy teams. The highly regarded *Situation Room* report, for which Jeff was editor and contributor, continues to be ranked among the top research reports in our industry. Jeff earned an MS degree in Computational Finance from Carnegie Mellon, a BA degree in Mathematics from the University of Minnesota, and a BA degree in Finance from the University of Wisconsin. He has been a Chartered Financial Analyst since 1997.



Andrew Spence is Managing Director at Omers Capital Markets where he is responsible for the Multi Strategy Portfolio. He has spent most of his professional life as an economist, strategist and research director on both the sell and buy sides of the street. On the sell side, Andrew was Global Head of Rates and FX Research at TD Securities, and Chief Economist for Canada at Deutsche Bank.

Prior to Omers, Andrew had a strategic role at the Ontario Teachers' Pension Plan where he was responsible for asset-liability research and strategic asset allocation. He also managed the total fund overlay that controlled overall balance sheet risk. During 2002 and 2003 Andrew was seconded to the Bank of Canada as Special Adviser to the Governor, and was an active member of the Monetary Policy Review Committee. He was also a member of the C.D. Howe Institute's Monetary Policy Council.

Andrew is an ad hoc lecturer at the University of Toronto, both at the Rotman School of Management and the Munk School of Global Affairs. He holds an M.Phil in Economics from the University of Bath, England.



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. The CFA Society of Los Angeles (CFALA) will donate up to 25% 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

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| <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 site with hyperlink to your company's website – if committed by January 11 |
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Platinum\$5,000

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| <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 – if committed by January 11 |
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Gold\$3,500

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| <ul style="list-style-type: none"> ■ Logo placement on Lobby signage ■ Acknowledgment as a Gold Sponsor in the Dinner Program | <ul style="list-style-type: none"> ■ Preferred table location ■ One table at the Forecast Dinner/10 dinner tickets |
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DIAMOND DIRECT – Direct tax-deductible donation to the CCEE (limit 5)\$5,000

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| <ul style="list-style-type: none"> ■ 501(c) (3) write off ■ Front Stage signage ■ Logo placement on Lobby signage | <ul style="list-style-type: none"> ■ Acknowledgment as a DIAMOND DIRECT Sponsor in the Dinner Program ■ Preferred table location ■ One table at the Forecast Dinner/10 dinner tickets |
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Wine Sponsor (Limit 2)\$1,750

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| <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 |
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FUNDRAISING FOR CFALA INVESTMENT LITERACY PROGRAM 2013

For the ninth consecutive year, CFALA is sponsoring two high school student contests in the metropolitan Los Angeles area with the California Council on Economic Education.

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?

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.

CFALA mentor volunteers 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 two contests work:

Capital Markets Contest

Combines the excitement of an athletic competition and the pride of academic achievement:

- Teams invest a hypothetical \$100,000 in stocks and mutual funds
- CFALA mentors help students develop the analytical tools essential to a long-term investment perspective.

- Teams prepare an essay using changes in economic indicators to describe the state of the economy during the period of the contest.
- High-scoring teams advance and present to a panel of judges, including CFALA members.

Financial Advisor 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.
- Portfolios consider such criteria as: investor goals and objectives, risk tolerance, time horizon and investment instruments.
- Teacher selects one team to send to CCEE for judging.
- High-scoring teams advance to the finals and present to a panel of judges, including CFALA members.

BE A CLASSROOM MENTOR THIS YEAR

Contact info@cfala.org for more information.

The CFA Society of Los Angeles (CFALA) is a not-for-profit organization of approximately 2,000 financial professionals. The CFA Society of Los Angeles promotes financial expertise, integrity, and professional skills among our members and CFA charter candidates. We improve the quality of financial decision-making throughout society by developing our members' ability to provide valuable leadership for their clients, their firms, and the CFA Institute. The means by which we accomplish and communicate our mission includes educational programs, networking events, and public advocacy.

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.

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 370, 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 25, 2013.**

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
- ☐ **Gold** \$3,500
- ☐ **DIAMOND/DIRECT** \$5,000
Checks only, payable to
"California Council on Economic Education"
- ☐ **Wine Sponsor** \$1,750

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 11, 2013**. 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.

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 _____