

FUTURE OF FINANCE

“Under New Management”

EVENT OVERVIEW

Please join us for the CFA Society of Houston 2018 Forecast Dinner: Future of Finance “Under New Management” and hear Keynote Speaker Brian S. Wesbury, an economist- forecaster who has more than three decades of experience on Wall Street with focus on monetary & fiscal policy, economic indicators, fixed income, commodities, and general macroeconomic conditions.

Also, learn how CFA charterholders can motivate and empower the world of finance to become an environment where investors thrive and their interests always come first, where capital markets function at their optimal best, and where economies experience unprecedented growth.

The CFA Houston Forecast Dinner Signature Event will bring together industry professionals for an evening of engaging discussions on the future of financial markets and the myriad of opportunities to serve the greater good.

FORECAST DINNER

January 25, 2018

CONTACT INFORMATION:

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MORE INFORMATION: www.cfahouston.org

PLATINUM SPONSORS:



FEATURED SPEAKER



Brian S. Wesbury

Chief Economist at First Trust Advisors L.P.

Brian Wesbury is Chief Economist at First Trust Advisors L.P., a financial services firm based in Wheaton, Illinois.

Mr. Wesbury was a member of the Academic Advisory Council of the Federal Reserve Bank of Chicago from 1999-2007 and has been a regular attendee of the Economist Roundtable Luncheon at the Chicago Fed since 2007. In 2012, he was named a Fellow of the George W. Bush Presidential Center in Dallas, TX where he worked closely with its 4%-Growth Project. His writing appears in various magazines, newspapers and blogs, and he appears regularly on Fox, Bloomberg, CNBC and BNN Canada TV.

In 1995 and 1996, he served as Chief Economist for the Joint Economic Committee of the U.S. Congress. The Wall Street Journal ranked Mr. Wesbury the nation's #1 U.S. economic forecaster in 2001, and USA Today ranked him as one of the nation's top 10 forecasters in 2004.

Mr. Wesbury began his career in 1982 at the Harris Bank in Chicago. Former positions include Vice President and Economist for the Chicago Corporation and Senior Vice President and Chief Economist for Griffin, Kubik, Stephens, & Thompson.

Mr. Wesbury received an M.B.A. from Northwestern University's Kellogg Graduate School of Management, and a B.A. in Economics from the University of Montana. McGraw-Hill published his first book, *The New Era of Wealth*, in October 1999. His most recent book, *It's Not As Bad As You Think*, was published in November 2009 by John Wiley & Sons.

In 2011, Mr. Wesbury received the University of Montana's Distinguished Alumni Award. This award honors outstanding alumni who have "brought honor to the University, the state or the nation." There have been 267 recipients of this award out of a potential pool of 91,000 graduates.

"Under New Management"

From Brexit, to Trump, the Italian Referendum, to the rise of a Thatcherite in France; the world is changing in massive ways. Add in activist central banks, bloated bureaucracies, and acrimonious politics – it's no wonder investors are nervous. Will the aging economic expansions stumble? Will the bull market in US stocks continue? Are inflation and rising interest rates in the cards? Brian Wesbury promises to cut through the noise to provide a solid, actionable game plan for investors in the years ahead. Wesbury called the bull market in US stocks starting in 2009. He's ready to tell you where they will go from here.

CFA SOCIETY OF
HOUSTON

ANNUAL FORECAST DINNER

FUTURE OF FINANCE

JANUARY 25, 2018

AGENDA

Time	Event
5:30 pm	Cocktail Hour and Registration
6:30 pm	Attendees are Seated
7:00-8:30 pm	Dinner Program
8:30 pm	Q&A
9:00 pm	Dismiss

(Subject to change)

WHO SHOULD ATTEND?

- Chief Executive Officers
- Chief Investment Officers
- Strategists
- Portfolio Managers
- Corporate Financial Analysts
- Private Bankers
- Investment Banking Analysts
- Brokers
- Risk Managers
- Consultants
- Research Analysts
- Financial Advisors
- Students

ATTIRE

Business Casual

Registration

Early Bird Registration ends December 31, 2017.

	Early Bird Price	Late Price
CFAH Member *Includes Two Drink Tickets and Parking	\$50	\$80
Non Member *Includes Two Drink Tickets and Parking	\$80	\$100
Students *Includes One Drink Tickets and Parking	\$25	\$30

REGISTER

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JANUARY 25, 2018

SUPPORTING OPPORTUNITIES

CATEGORY	DIAMOND	PLATINUM	GOLD	SILVER	TABLE SPONSOR
Price (in \$\$)	10,000	5,500	3,500	2,500	1,750
NO. OF COMPLIMENTARY CONFERENCE PASSES					
Delegates pass—full access to conference	negotiable	10	10	8	10
Ability to set up a both /table at the venue	-	-	-	-	-
Ability to have a name tag on the table	-	-	-	-	-
PRE-EVENT and ON-SITE EVENT BRANDING					
Company logo displayed on official CFA HOUSTON Conference website	-	-	-	-	-
Inclusion of name/logo on all event marketing and publicity materials*	-	-	-	-	-
Substantial signage throughout the event site	-	-	-	-	-
Logo placed prominently on program guide	-	-	-	-	-
Option to place promotional material in the program folder	-	-	-	-	-
Opportunity to introduce a keynote speaker and display logo before presentation	-	-	-	-	-
Ability to place a signage in CFAH branding materials (negotiable)	-	-	-	-	-
Name/logo included on event entrance	-	-	-	-	-
Mention in all media interviews and speaking engagements if any	-	-	-	-	-
DELEGATE MATERIALS					
Company logo displayed on delegate badges/ name tags	-	-	-	-	-
Print advertisement included in conference program	1 page	½ page	-	-	-
Company corporate marketing material (one piece) included in conference kit	-	-	-	-	-
OTHER ADVERTISING OPPORTUNITIES					
Ability to receive free passes to 3 CFAH presentation throughout the upcoming program year (# of passes)	3	2	-	-	-
Ability to send a speaker to speak at CFAH lunch program (# of programs)**	2	-	-	-	-

*Subject to promotion restrictions.

** Topics are subject to the Programming Committee approval

COCTAIL HOUR SPONSORSHIPS ARE ALSO AVAILABLE

All the materials for distribution at the event are subject to review. Please send all presentations/brochures to Kelly Wilson kellyw@amc-texas.com at least a month before the event for approval.

DEADLINE FOR ENROLLMENT AND SUBMISSION: DECEMBER 15, 2017

SPONSORSHIP CHECKS SHOULD BE MADE OUT AND MAILED TO:

CFA Society of Houston

PO Box 32, Bellaire, TX 77402

Phone: (713) 877-1838

Email: Kelly Wilson @ kellyw@amc-texas.com

2018 CFA Society of Houston Forecast Dinner Signature Event *SPONSORSHIP FORM*

PLEASE INDICATE YOUR PREFERRED LEVEL OF SPONSORSHIP BY CHECKING THE APPROPRIATE BOX.

- DIAMOND SPONSOR - \$10,000
- PLATINUM SPONSOR - \$5,500
- GOLD SPONSOR - \$3,500
- SILVER SPONSOR - \$2,500
- TABLE SPONSOR - \$1,750 (ONLY TABLE TAG GARANTEED)
- OTHER _____ - \$ _____.00

To receive all benefits available to sponsoring organizations, commitment must be made by **December 15, 2017**. Thereafter, sponsoring opportunities will continue to be available with decreased benefits, due to printing and production deadlines.

The following signature indicates acceptance of sponsorship.

On behalf of the sponsoring company:

Name

Company Name

Address

City

State

Zip

Signature

Title

Date

Please return to:

CFA Society of Houston
PO Box 32, Bellaire, TX 77402
(713) 877-1838 (phone)
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