



ANNUAL FORECAST DINNER

January 23, 2019

The Post Oak Hotel

EVENT OVERVIEW

The Annual Forecast Dinner is the CFA Society of Houston's flagship event. This year's panel of highly esteemed market experts will share their views on the state of the capital markets, offer insights into market direction, and provide investable ideas for 2019. This event is not only a major draw to the local CFA Society's over 1,000 members, but also to the many other financial professionals (and their clients) in the Greater Houston area.

CONTACT

Steven Sheldon
steven@smscap.com

Kelly Wilson
kellyw@amc-texas.com

MORE INFORMATION
www.cfahouston.org

WHO SHOULD ATTEND?

- Corporate Executives
- Market Strategists
- Portfolio Managers
- Financial Analysts
- Wealth Managers and their top clients
- Financial Planners and Advisors
- Investors
- Family Office Managers
- Students



PANELISTS



Mark Freund
Chief Investment Officer
Calamos Investments

As a Co-Chief Investment Officer, Matt Freund is responsible for oversight of investment team resources, investment processes, performance and risk. As Head of Fixed Income Strategies, he manages investment team members and has portfolio management responsibilities. Matt joined Calamos in 2016 and has 29 years of industry experience. He received a B.A. in Accounting from Franklin & Marshall College and an M.B.A. from Indiana University.



Mark Finn
Portfolio Manager
T. Rowe Price Value Fund

Mark Finn is a vice president of T. Rowe Price Group, Inc., and T. Rowe Price Associates, Inc. He is the portfolio manager of the Value Fund and chairman of its Investment Advisory Committee and co-portfolio manager of the Institutional Large-Cap Value Fund. Mark is also a vice president and Investment Advisory Committee member of the Equity Income, New Era, Capital Opportunity, and Mid-Cap Value Funds and is a vice president of the Balanced Fund.



Jim Paulsen
Chief Investment Strategist
Leuthold Group

Jim is Chief Investment Strategist of The Leuthold Group, LLC. He is a member of the investment committee, authors market and economic commentary, and works with the Leuthold investment team in serving institutional, financial advisor, and investment-professional clients. His long-running newsletter, now titled Paulsen's Perspective, is published and distributed alongside our premier monthly research product, Perception for the Professional.

MODERATOR



Laura Lutton
North American Practice Leader, Manager Research
Morningstar Research Services

Laura Lutton is North American practice leader, manager research, for Morningstar Research Services LLC, a wholly owned subsidiary of Morningstar, Inc. She directs the firm's manager research analyst teams in the United States and Canada.

She is also a founding member of Morningstar's Women's Initiative and chairs the group's Women and Investing committee.



REGISTRATION FEES*

	Early Bird until December 31st	Late
CFAH Member	\$50	\$80
Non-Member Rate	\$70	\$100
Student Rate	\$25	\$35

AGENDA

- 5:30 pm Registration and Networking
- 6:30 pm Attendees are seated
- 7:00 pm Dinner and Program
- 9:00 pm Program Concludes
- 9:00 pm VIP Reception**

*Valet Parking included

**Invitation only





SPONSORSHIP OPPORTUNITIES

Category	Platinum \$6000	Gold \$4000	Silver \$2500	Table Sponsor \$1000
# Available at each level	4	10	15	Unlimited
Benefits Prior to Event				
Company logo on CFA Houston Conference website	Large	Medium	Small	Name
Company logo on event email marketing	Large	Medium	Small	Name
Company logo on print advertising	Yes	Yes	Yes	
Company logo on digital advertising	Yes	Yes	Yes	
Logo Size in Media	Large	Medium	Small	Name
Benefits During Event				
Reserved seating with table sign	Yes	Yes	Yes	Yes
Tickets	10	10	10	10
Signage throughout event site	Yes	Yes	No	No
Logo on program guide	Large	Medium	Small	Name
Looped Slideshow	Single Slide	Single Slide	Shared Slide	Shared Slide
Print advertisement in program guide	1/2 page	1/4 page	1/8 page	
Benefits After Event				
Invitation to exclusive VIP Reception with panelist after the dinner presentation	Yes	Yes	No	No
Logo on post-event survey email	Large	Medium	No	No
Post-event social media post	Yes	Yes		
Two free passes to CFAH luncheon throughout the upcoming program year	Yes			