



2020 SPONSORSHIP OPPORTUNITIES



**CFA Society
Austin**

The CFA Society of Austin

Presents its

18th Annual Investment Strategy Dinner

The US and China: When Two Global Economies Collide



With Special Guests



Rodger Baker
Senior Vice President of
Strategic Analysis, Stratfor



Jason Bedford
China Research, Financials
Bridgewater Associates



Joachim Fels
Global Economic Advisor &
Managing Director, PIMCO



Joyce Li, CFA
Portfolio Manager
Matthews Asia



Moderated by: Cody Willard

Hedge Fund Manager & Investment News Commentator

Wednesday, February 19, 2020 • 5:15 pm – 8:30 pm
The JW Marriott • 110 E. 2nd Street, Austin, Texas

CFA Society Austin is one of the fastest growing US professional organizations with a membership base that reflects the vibrant nature of Austin. It's the largest organization of investment professionals in central Texas with a diverse membership growing at 6% annually since 2013.

The institutional nature of many of the area's employers, with large contingents from various Texas employee retirement systems, state university endowments and large asset managers, Dimensional Fund Advisors and PIMCO, makes the organization's membership a valuable target for many service providers and asset managers. Further, as a fast growing metropolitan area, CFA Society Austin further draws from a sophisticated group of private wealth advisors, adding an additional dimension to those looking to maximize their outreach to central Texas financial professionals.

To reach these groups, CFA Society Austin can serve as a valuable partner. Moreover, it's noteworthy that the Society's reach extends beyond its membership base. CFA Society Austin distributes information to an email distribution list of more than 1,400, and is aggressively expanding its social media reach. The Society currently has over 1,300 Twitter followers and more than 900 Facebook followers. The Society offers the following opportunities to keep your brand front and center with many of the city's most sophisticated investment professionals and decision makers.

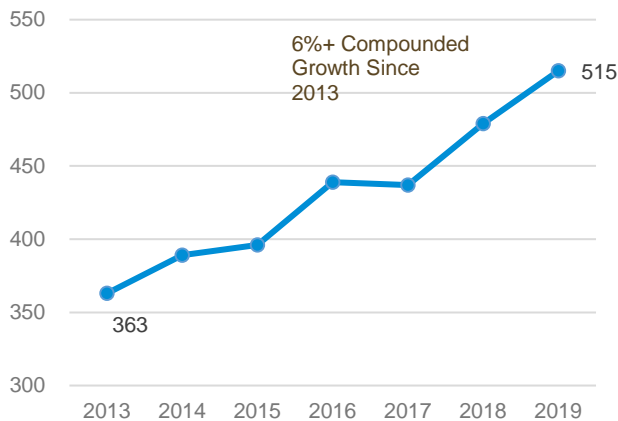
CFA Society Austin is a non-profit, professional organization with over 500 members. It was founded in 1963 to serve the practitioner's need for specialized knowledge, advanced studies, and information on new developments in investments and financial management. Of equal importance has been its mission to promote high ethical and professional standards among its members.

Mission

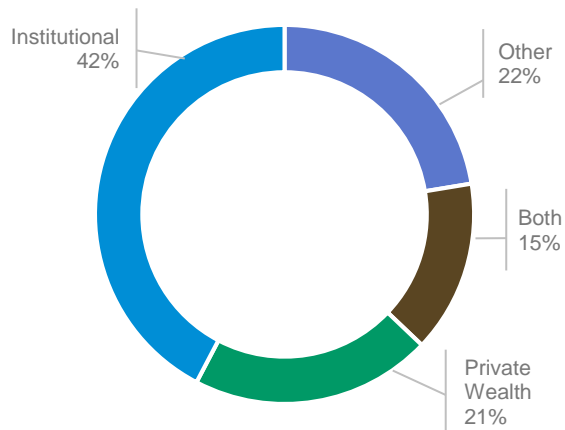
CFA Society Austin's mission is to:

Lead the Austin investment community by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of our members and the community.

Active Society Membership



Primary Asset Base



Job Functions



CFA Society Austin's **Annual Investment Strategy Dinner** gathers 300 investment professionals and prominent practitioners from across Central Texas who are recognized for their insight, accomplishments, and ongoing commitment to advancing integrity and expertise in the investment profession. This year's format will consist of a panel of experts with a moderator. The goal of the presentation will be to answer the following questions: 1) How do you invest in China during this tumultuous time? 2) What is in store for the Chinese banking system? 3) What might happen over the next 5 years? 4) How strong of a competitor to the US will China become?

MEET THE PANEL

Rodger Baker joined Stratfor in 1997 and leads Stratfor's strategic thinking on global issues and future trends. As the firm's senior analyst, Mr. Baker guides the company's analytical process, to include the development of international analyst teams to refine their understanding and application of Stratfor's proprietary methodology grounded in the study of applied geopolitics and intelligence analysis. Mr. Baker holds a master's degree in military history from Norwich University, the oldest private military university in the United States. He has studied and worked in South Korea and graduated with honors from Southampton College, Long Island University.

Jason Bedford joined Bridgewater in 2019, and is currently a Senior China Research Associate on the China Research team. Prior to joining Bridgewater, he spent nearly six years at UBS as a China banking analyst. He also spent nearly a decade with KPMG in Beijing, primarily serving as an auditor and consultant for the mainland financial services sector. While there, he had a core focus on the banking sector as well as non-bank lenders (aka "shadow banks") which included the trust sector, leasing, micro-finance and credit guarantee. He has spoken as a subject matter expert on these topics for the China Banking Regulatory Commission, the China Trustee Association and numerous banks.

Joachim Fels is the Global Economic Advisor at PIMCO, working in the Newport Beach headquarters. In addition to his roles as Managing Director and member of the Investment Committee, he leads PIMCO's quarterly Cyclical as well as the Secular Forum process. Prior to joining PIMCO in 2015, he was the Global Chief Economist at Morgan Stanley in London. Previously, he was an international economist at Goldman Sachs and a research associate at the Kiel Institute for the World Economy. Joachim has 32 years of macroeconomic research experience.

Joyce Li is a Portfolio Manager for Matthews Asia, the largest dedicated Asia investment specialist in the United States with offices in San Francisco, London, Hong Kong, Singapore, and Shanghai. Prior to joining Matthews Asia in 2016, Joyce was a Portfolio Manager and Principal at Marvin & Palmer Associates, investing in Asia markets since 2007. Joyce frequently speaks at conferences on topics of investing and corporate governance in Asia. Joyce will share her insights on how to invest in China during this tumultuous time of Trade Wars and Tariffs.

Cody Willard will moderate the panel discussion. He is the founder and **Portfolio Manager of the 10,000 Days Hedge Fund**. He has been a TV news anchor on Fox Business and CNBC and is the publisher of TradingWithCody.com.

ABOUT THE EVENT | The 18th Annual Investment Strategy Dinner is CFA Society Austin's marquee event and remains a major highlight of the central Texas investment community. Our 2020 event will provide influential members with the opportunity to entertain their clients and gather actionable insights from leading investment practitioners. Guests enjoy cocktails, a delicious meal, and vast networking opportunities with 300 like-minded industry professionals. This year's event will be held in the Grand Ballroom on the 4th Floor at **The JW Marriott**, located in downtown, Austin. **THIS EVENT WILL SELL OUT! Please register early!**

ATTENDEES | Our guests include portfolio managers, wealth managers representing billions in assets under management, sales and marketing professionals and partners, research analysts, professors, strategists, principals, CEOs, CFOs, and CIOs. These top professionals represent decision-makers from Central Texas's premier investment firms, pension fund advisors, wealth management firms, family offices, banks, insurance companies, investment counselors, brokers, public agencies, universities, and financial services corporations.

Year-Round Sponsorships

	Diamond Society Sponsorship	Platinum Programming Sponsorship
Available Sponsorships (Capped):	1	4
Investment:	\$8,000	\$6,000
Duration:	1-Year (2020)	1-Year (2020)

BENEFITS THROUGHOUT 2020

CFASA Paid Print Advertising	Yes	No
CFASA Paid Digital Advertising	No	No
Programming Emails	Yes	Yes
Non-Programming Broadcast Emails	Yes	No
Monthly Newsletter (Email Delivery)	Yes	Yes
Twitter/FB Partnership Post	Yes 4	Yes 2
Website - Homepage	Yes	No
Website - Programming Pages	Yes	Yes
Website - Annual Dinner Page	Yes	Yes
Admittances to Society Events:	2	2
Logo Size in Internal Media:	Large	Medium

ADDITIONAL ANNUAL DINNER BENEFITS

	Single Slide	Shared Slide
Looped Slide Show	Single Slide	Shared Slide
CFASA Speaker Acknowledgement	Yes	Yes
Signage During Cocktail Hour	Yes	No
Signage on Cocktail Bar	No	No
Cocktail Napkins with Logo	No	No
Presentation Intro	No	No
Event Program	Inside Program	Inside Program
Table with Signage	Yes	Yes
Tickets	8	8
Discount for Additional Tables/Tickets:	50%	NA
Post-Event Summary Email	Yes	Yes

Annual Dinner Sponsorships

	Lead Sponsor	Networking Sponsor	Event Sponsor
Available Sponsorships (Capped):	1	3	6
Investment:	\$8,000	\$4,000	\$2,500
Duration:	Annual Dinner	Annual Dinner	Annual Dinner
BENEFITS PRIOR TO EVENT			
CFASA Paid Print Advertising	Yes; Presented by	Yes	No
CFASA Paid Digital Advertising	Yes; Presented by	No	No
Standalone Email Announcements	Yes; Presented by	Yes	Yes
Monthly Newsletter (Email Delivery)	Yes; Presented by	Yes	No
Twitter/FB Partnership Post	Yes 2	Yes 1	Yes 1 Shared
Website - Homepage	Yes	NA	NA
Website - Annual Dinner Page	Yes; Presented by	Yes	Yes
Logo Size in Media:	Large	Medium	Small
BENEFITS DURING EVENT			
Looped Slide Show	Single slide	Single slide	Shared 1
CFASA Speaker Acknowledgement	Yes	Yes	Yes
Signage During Cocktail Hour	Yes	Yes	Yes
Signage on Cocktail Bar	No	Yes	No
Cocktail Napkins with Logo	No	Yes	No
Event Program	Inside Front Cover	Inside Back Cover	Shared 1 (with description)
Table with Signage	Yes	Yes	Yes
Tickets	8	8	8
Discount for Additional Tables/Tickets:	50%	NA	NA
BENEFITS POST-EVENT			
Post-Event Summary Email	Yes; Presented By	Yes	Yes
Post-Event Twitter/FB Post	1	1	Shared

In addition, as in prior years, tables will be available for purchase at a rate of \$1,750 per table (for 8 seats). Purchasers of tables will be recognized within the brochure and will have their name displayed on the table on the evening of the event.

The 2020 CFA Society Austin Annual Dinner will be held on Wednesday, February 19 at the JW Marriott in Downtown Austin.



2020 SPONSORSHIP OPPORTUNITIES REMITTANCE

		SPONSORSHIP TYPE	
YEAR ROUND SPONSORSHIP			
Diamond Society Sponsorship	\$8,000	_____	(Initial)
Platinum Programming Sponsorship	\$6,000	_____	(Initial)
ANNUAL DINNER SPONSORSHIP (Feb. 19, 2020)			
Annual Dinner Lead Sponsorship	\$8,000	_____	(Initial)
Annual Dinner Networking Sponsorship	\$4,000	_____	(Initial)
Annual Dinner Event Sponsorship	\$2,500	_____	(Initial)
Annual Dinner Table Purchase	\$1,750	_____	(Initial)

By Initialing here and signing below, we hereby agree to become a CFA Society Austin sponsor at the level and fee as shown. Further, we agree to the terms and conditions outlined.

The CFA Society Austin is unable to reserve underwriting opportunities.

Payment must be included to secure and finalize purchase(s). All fees are nonrefundable once paid.

ORGANIZATION AND CONTACT INFORMATION

Organization Name (as you wish it to appear on sponsorship publicity)

Primary Contact Name Contact Phone Number

Organization Website

Primary Contact Email Address

Mailing Address

Authorized Signature Date