



Setting a higher standard for the San Diego investment community

THE CFA SOCIETY OF SAN DIEGO
PRESENTS THE

2009 ANNUAL FORECAST DINNER

FEATURING



DONALD H. STRASZHEIM
Vice Chairman,
Roth Capital Partners, LLC

FEATURING



LIZ ANN SONDRERS
Senior Vice President,
Chief Investment Strategist,
Charles Schwab & Co., Inc

MODERATED BY



JANE WELLS
Reporter, CNBC



Manchester Grand Hyatt
San Diego

WEDNESDAY
FEBRUARY 11, 2009
5:30 PM TO 9:00 PM

One Market Place,
San Diego, California 92101

PROGRAM AGENDA

- ◆ 5:30 p.m. - 6:45 p.m. ~ Registration and Cocktails
- ◆ 6:45 p.m. ~ Dinner
- ◆ 7:30 p.m. - 8:30 p.m. ~ Presentations by Speakers
- ◆ 8:30 p.m. ~ Speaker Panel Q&A
- ◆ 9:00 p.m. ~ Conclusion of the 2009 Forecast Dinner



LIZ ANN SONDEERS
SENIOR VICE PRESIDENT, CHIEF INVESTMENT STRATEGIST, CHARLES SCHWAB & Co., Inc.

Liz Ann Sonders is Senior Vice President and Chief Investment Strategist for Charles Schwab & Co., Inc. Liz Ann has a range of investment strategy responsibilities reaching from market and economic analysis to investor education, all focused on the individual investor. She chairs Schwab's Investment Strategy Council, which provides strategic asset allocation guidance and tactical sector recommendations for the firm's investor base. The output of Liz Ann's work is via written reports, audio recordings, conference calls, and webcasts. She is a regular contributor to all of Schwab's client newsletters and the keynote speaker at many of the firm's corporate and client events, as well as related external events.

Prior to joining Schwab in 2002, Liz Ann was a Managing Director at U.S. Trust (a division of Schwab, 2000-2007) and a member of its Investment Policy Committee. Before U.S. Trust, Liz Ann was at Avatar Associates, an original division of the Zweig/Avatar Group for 13 years, ending her tenure as a Managing Director and member of the firm's six-person Management Committee. She is a regular guest on many CNBC programs, as well as on ABC's Good Morning America and World News Tonight, CBS's The Evening News and The Early Show, PBS's Lehrer News Hour and Nightly Business Report, Fox Business News, and Bloomberg TV & Radio. She was a regular panelist and guest host on PBS's Wall Street Week With Louis Rukeyser. Liz Ann is regularly quoted in The Wall Street Journal, Barron's, New York Times, USA Today, Financial Times, SmartMoney and Business Week, as well as many international publications. In 2006, Liz Ann was named one of SmartMoney's "Power 30," their list of most influential people on Wall Street, alongside Warren Buffett, Hank Paulson and Ben Bernanke.

In 2005, Liz Ann was appointed to and served on the President's Advisory Panel on Federal Tax Reform. In 2007 Liz Ann was named to the national board of directors and appointed Treasurer for the Make-A-Wish Foundation of America. She received the 2007 Thomas E. Sinton Humanitarian Award from The Tower of Hope Foundation and is now serving on its advisory board. In 2008 Liz Ann was honored by the Girl Scouts of New York as an "Exceptional Role Model for Young Women."

Liz Ann received her B.A. in economics and political science from the University of Delaware. Currently, she sits on two endowment advisory committees for the university. She received her M.B.A. in finance from Fordham University.



DONALD H. STRASZHEIM
VICE CHAIRMAN, ROTH CAPITAL PARTNERS, LLC

Donald H. Straszheim is Vice Chairman of Roth Capital Partners in Los Angeles, former global Chief Economist at Merrill Lynch in New York City, a contributing columnist for Forbes.com, Visiting Scholar at the UCLA Anderson School of Management, and a long-time China specialist.

Straszheim, a Wall Street veteran, joined Roth Capital Partners in 2006 to spearhead the firm's China initiative. Since the mid 1990s, he has focused on understanding how China affects investments, companies, industries, sectors and policy in America and elsewhere.

From 1985 to 1997, Straszheim served as the Global Chief Economist for Merrill Lynch and Co. where he was voted ten consecutive years to Institutional Investor's 'All-Star Team'. As Merrill's chief economic spokesperson, he traveled globally representing the firm and led its worldwide research effort.

From 1997 to 2001, he was President of the Milken Institute, a not-for-profit economic think tank in Santa Monica, CA, continuing as Vice Chairman until 2004.

From 2001 to 2005, Straszheim was principal of Straszheim Global Advisors, an economic and financial markets advisory firm with offices in Los Angeles and Beijing.

Currently Straszheim serves on various public-and private-sector boards and is immediate past President of the Chartered Financial Analysts Society of Los Angeles. He earned B.S., M.S. and Ph.D. degrees from Purdue University, and is a regular speaker and media commentator on China and the global economy and markets.

**SPEAKER
BIOGRAPHIES****JANE WELLS
REPORTER, CNBC**

Jane Wells is currently a CNBC business news reporter, based in Los Angeles, covering the defense and technology industries. Wells came from CNBC's "Upfront Tonight" where she was senior correspondent.

Wells joined CNBC in 1996, providing special coverage of the O.J. Simpson civil case for "Rivera Live." Prior to joining CNBC, she was a correspondent for the Fox News Channel and Los Angeles reporter for NBC's flagship television station, WNBC, New York. Her television news career includes reporter positions with KTTV, Los Angeles; WTVJ, Miami; and, KOB, Albuquerque. She has also contributed international reports for CNN.

Wells 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 has also 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.

Wells 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.



CFASSD ANNUAL FORECAST DINNER

ABOUT THE CFA SOCIETY OF SAN DIEGO

OUR MISSION

The mission of the CFASSD is to serve the needs of professionals in the investment decision making process by providing a forum for the exchange of information and ideas among its members, by enhancing members' investment knowledge, and by encouraging high ethical standards and professional conduct among all participants in the investment industry.

WHO WE ARE

The CFA Society of San Diego was founded in 1962 as the Financial Analysts Society of San Diego, Inc. to promote a high standard of ethics and sound professional standards of investment management and research, and to enhance professional knowledge and skills. The Society was admitted to the Association for Investment Management and Research (AIMR) on November 4, 1963. In May 2004, AIMR became CFA Institute and in May 2005, the Society changed its name to CFA Society of San Diego (CFASSD), in order to more closely align with the CFA Institute and the Chartered Financial Analyst (CFA®) designation.

There are approximately 400 members of the CFASSD, including security analysts, portfolio managers, bankers, and other investment professionals. Approximately 330 CFASSD members hold the Chartered Financial Analyst designation, and many others are currently candidates for this professional designation.

ABOUT THE CFASSD FORECAST DINNER

This year marks our third annual CFASSD Forecast Dinner. As the Society has grown into a larger local society, we anticipate the event will draw an estimated 200-300 attendees and guests. Most of the attendees will include professional money managers, investment consultants, plan sponsors, financial planners and financial advisors from San Diego and Southern California.

The 2009 Forecast Dinner will consist of a cocktail hour, dinner, two twenty-five minute presentations from speakers sharing unique perspectives on the market, and a thirty-minute Q&A speaker panel discussion led by CNBC business reporter Jane Wells. Each attendee will enjoy a cocktail reception and an exceptional three-course meal accompanied by wine at the Hyatt Manchester Downtown San Diego. Tickets are \$90 for individuals. Standard Tables seating 10 persons are \$850, and Patron Tables are \$1000.



**UNDERWRITING
OPPORTUNITIES**

The Forecast Dinner is a unique opportunity for San Diego investment professionals to gather and discuss their thoughts for economy and financial markets. We hope your firm will join us for this special occasion and support us at a level commensurate with your vision for our organization. Your pledge of support will assist the CFASSD in its ongoing effort to provide high quality programming to its members. It will also identify your firm as one that understands the need to support the highest standards in the financial services industry by endorsing a professional investment organization such as the CFASSD.

UNDERWRITING OPPORTUNITIES	PRICE	NUMBER AVAILABLE
♦ Cocktail Reception Firm logo on signage at reception and cocktail napkins	\$2,500 each	2
♦ Cocktail Appetizers Firm logo on signage at cocktail reception	\$2,000 each	2
♦ Dinner Wine Firm name on card at each seat	\$3,000 each	1
♦ Dinner Flowers Firm name on card at each seat	\$2,000 each	1
♦ Musicians Firm name on signage at reception	\$1,500 each	1
♦ Parking for Attendees Firm name on card at each seat	\$1,800 each	1
♦ Program Printing Firm name on back cover of program	\$1,000 each	1

Each underwriting opportunity includes two tickets to the event.

If your firm is interested in a more comprehensive sponsorship opportunity as one of our Platinum, Gold, or Silver partners, please see our CFASSD Corporate Sponsorship Brochure at www.cfasd.org. Alternatively you may email president@cfasd.org or programs@cfasd.org.



REGISTRATION FORM

UNDERWRITING OPPORTUNITIES:

- \$2,500 Cocktail Reception
- \$2,000 Cocktail Appetizers
- \$3,000 Dinner Wine
- \$2,000 Dinner Flowers
- \$1,500 Musicians
- \$1,800 Parking
- \$1,000 Program Printing

ATTENDEE RESERVATIONS:

	# Requested	Total \$ Amount
<input type="checkbox"/> Patron Table	at \$1000 for
<input type="checkbox"/> Standard Table	at \$850 for
<input type="checkbox"/> Individual	at \$90 for
		Total

PAYMENT OPTIONS:

- Check (Payable to CFA Society of San Diego)
- Credit Card – MasterCard/Visa (circle)
 - Total Amount: \$
 - Credit Card #:
 - Credit Card Expiration Date:
 - Credit Card 3 or 4 digit security code:
 - Cardholder Signature:
 - Cardholder Name:

If you have additional questions regarding CFASSD sponsor opportunities please contact: president@cfassd.org or programs@cfassd.org

Please fax form to (858) 271-0599 or mail to: CFASSD
 P.O. Box 928456, San Diego, CA. 92192-8456
 Website: <http://www.cfassd.org>

*All ticket and Table reservations are nonrefundable beginning January 31, 2009. Sponsorships are nonrefundable.



TABLE GUEST LIST

FOR SPONSOR/TABLE RECOGNITION, PLEASE PRINT YOUR NAME AS YOU WISH TO BE RECOGNIZED:

- Name and Title:
Company:
Address:
Telephone:
Email:

If you have additional questions regarding CFASSD sponsor opportunities please contact: president@cfassd.org or programs@cfassd.org

GUEST NAMES (PLEASE PRINT CLEARLY):

- 1.
2.
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10.

Guest list is optional at time of reservation. However, CFASSD will need your guests names by Friday, February 6, 2009.

Please fax form to (858) 271-0599 or mail to: CFASSD
P.O. Box 928456, San Diego, CA. 92192-8456
Website: http://www.cfassd.org