

# ANNUAL FORECAST DINNER

January 23, 2019

The Post Oak Hotel

## Event Overview

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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 in the Greater Houston area.

## Featured Panel

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**Matt Freund, CFA**  
Co-CIO  
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. He is also a member of the Calamos Investment Committee, which is charged with providing a top-down framework, maintaining oversight of risk and performance metrics, and evaluating investment process. Matt joined Calamos in 2016 and has 29 years of industry experience. Prior to joining Calamos, he was Chief Investment Officer of USAA Investments, leading the teams responsible for the portfolio management of USAA's mutual funds and affiliated portfolios, including P&C and life insurance products, and overseeing more than \$140 billion in assets. During this time, he also served as lead portfolio manager for several highly regarded fixed income mutual funds. Earlier in his career, Matt served as a senior investment analyst for MetLife in the Capital Markets Group. 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. From 2005 to 2009, Mark was an equity research analyst specializing in electric power generation, utilities, and coal. Prior to this, he was an analyst in T. Rowe Price's Fixed Income Division, where he also covered utilities and power generation. From 1998 to 2001, Mark worked with the T. Rowe Price recovery strategy team, where he evaluated financially distressed companies. Mark began his career with T. Rowe Price in 1990 in the Finance Division, where he served as controller of T. Rowe Price Investment Services and as the principal accounting officer for the T. Rowe Price realty income strategies. Prior to joining the firm, he had five years of auditing experience with Price Waterhouse LLP, where he worked on engagements for both public and private companies. Mark earned a B.S. from the University of Delaware and has earned the Chartered Financial Analyst designation. He is also a certified public accountant.

**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*.

Paulsen has been an investment industry professional since 1983, most recently as Chief Investment Strategist at Wells Capital Management where he worked for 20 years. Prior to that, Jim was the senior managing director and Chief Investment Strategist for Investors Management Group in Des Moines, Iowa. He also served as president of SCI Capital Management in Cedar Rapids, Iowa. For more than 30 years, Jim has published commentary examining economic and market trends. He is nationally recognized for his views on the economy, frequently appears on CNBC and Bloomberg TV, and is invited to speaking engagements across the country. He was named a top economic forecaster by *Business Week*, and *Money Magazine* called his newsletter one of "101 Things Every Investor Should Know." Jim earned a bachelor's degree and Doctoral Degree in Economics from Iowa State University.

## Moderator

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**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.

Before assuming her current role in 2016, Lutton was director of manager research for equity strategies, North America. She has been a leader in the Manager Research group for more than a decade, previously heading the firm's Parent research and ratings on mutual fund firms. Lutton helped develop Morningstar's Analyst Rating™ methodologies for mutual funds, target-date series, and 529 college savings plans. She is also a

founding member of Morningstar's Women's Initiative and chairs the group's Women and Investing committee.

Lutton joined Morningstar in 1999 as an equity analyst and moved to the fund research team in 2001. Before joining Morningstar, Lutton was the Chicago bureau chief for *American Banker*.

Lutton holds a bachelor's degree in government and international studies from Colby College and a master's degree from Northwestern University's Medill School of Journalism.

## Event Info

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### **AGENDA**

5:30pm - Registration

6:30pm - Attendees are Seated

7:00pm - 8:30pm: Dinner and Program

8:30pm - Q&A

9:00pm - Dismiss

### **WHO SHOULD ATTEND**

Corporate Executives

Market Strategists

Portfolio Managers

Financial Analysts

Wealth Managers

Financial Planners and Advisors

Investors

Family Office Managers

Students

### **ATTIRE**

Business Casual

**CONTINUING EDUCATION CREDITS**

Venue

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## Registration

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	Early Bird Price	Late Price
<b>CFAH Member</b> *Includes Two Drink Tickets and Parking	\$50	\$80
<b>Non Member</b> *Includes Two Drink Tickets and Parking	\$70	\$100
<b>Students</b> *Includes Two Drink Tickets and Parking	\$25	\$35



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