

Annual Forecast Dinner - February 2, 2022



CFA Society Houston

SAVE THE DATE
ANNUAL FORECAST DINNER

FEBRUARY 2, 2022 5:30PM CT
RIVER OAKS COUNTRY CLUB

THOMAS LEE, CFA
CO-FOUNDER AND HEAD OF RESEARCH
FUNDSTRAT

BEN INKER, CFA
CO-HEAD OF ASSET ALLOCATION
GMO

SONAL DESAI, PH.D.
CHIEF INVESTMENT OFFICER
FRANKLIN TEMPLETON FIXED INCOME

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Early bird pricing (until January 7, 2022)

CFAH Member \$50

Guest \$70

Student \$25

Normal Pricing (after January 7, 2022)

CFAH Member \$80

Guest \$100

Student \$35

A bit about our speakers:

**THOMAS J. LEE, CFA
CO-FOUNDER AND HEAD OF RESEARCH
FUNDSTRAT**

Thomas Lee is a co-founder, managing partner, and the head of research at Fundstrat Global

Advisors and FSInsight.com. He is an accomplished Wall Street strategist with over 25 years of experience in equity research and has been top ranked by Institutional Investor every year since

1998. Prior to co-founding Fundstrat, he served most recently as JP Morgan's chief equity

strategist from 2007 to 2014, and previously, as managing director at Salomon Smith Barney. His

areas of expertise include market strategy, small/mid-cap strategy, and telecom services. Mr.

Lee received his BSE from the Wharton School at the University of Pennsylvania with concentrations in finance and accounting. He is a CFA charterholder and is an active member of

NYSSA and the NY Economic Club.

**BEN INKER, CFA
CO-HEAD OF ASSET ALLOCATION
GMO**

Mr. Inker is co-head of GMO's Asset Allocation team and a member of the GMO Board of Directors.

He joined GMO in 1992 following the completion of his B.A. in Economics from Yale University. In

his years at GMO, Mr. Inker has served as an analyst for the Quantitative Equity and Asset

Allocation teams, as a portfolio manager of several equity and asset allocation portfolios, as

co-head of International Quantitative Equities, and as CIO of Quantitative Developed Equities. He

is a CFA charterholder.

**SONAL DESAI, PH.D.
CHIEF INVESTMENT OFFICER
FRANKLIN TEMPLETON FIXED INCOME**

Sonal Desai, Ph.D. is the executive vice president and chief investment officer for Franklin

Templeton Fixed Income. Dr. Desai is responsible for overseeing Franklin's Municipal, Corporate

Credit, Floating Rate, Multisector, Global (including Emerging Markets), and Money

Market Fixed

Income teams. She is also a portfolio manager for a number of strategies, including Core Plus,

Strategic Income, Total Return, Low Duration, Global Absolute Return, and Global Aggregate

Fixed Income. Dr. Desai holds a bachelor of arts in economics from Delhi University and a Ph.D. in economics

from Northwestern University. She was part of the Templeton Global Bond Fund portfolio

management team named Morningstar's Fixed Income Manager of the Year in Canada in 2013.

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Please reach out to Karina at office@cfahouston.org if you are interested in being a sponsor or buying a table at the Annual Forecast Dinner!