

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

Early Bird Pricing until December 18th
Members: \$75
Non-Members: \$100

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. [Read his full bio here.](#)

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!**

SPONSORSHIP OPPORTUNITIES | Sponsorship, Table, and Individual Ticket opportunities can be found [HERE](#). To sign up as a sponsor, please email completed form to admin@cfaaustin.org. An invoice will be sent via email. Once payment is made, sponsorship is confirmed. We will be reaching out two weeks prior to the event to gather attendee names and meal preferences.

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.

Continuing Education Credits:
1.5 CFP® CE credits approved.