



CFA Society
San Diego

18TH ANNUAL FORECAST DINNER

FEBRUARY 5TH 2025

The Prado @ Balboa Park | 1549 El Prado | San Diego

FEATURING



SPEAKER

BRIAN BELSKI



SPEAKER

JIM BIANCO



MODERATOR

JANE WELLS

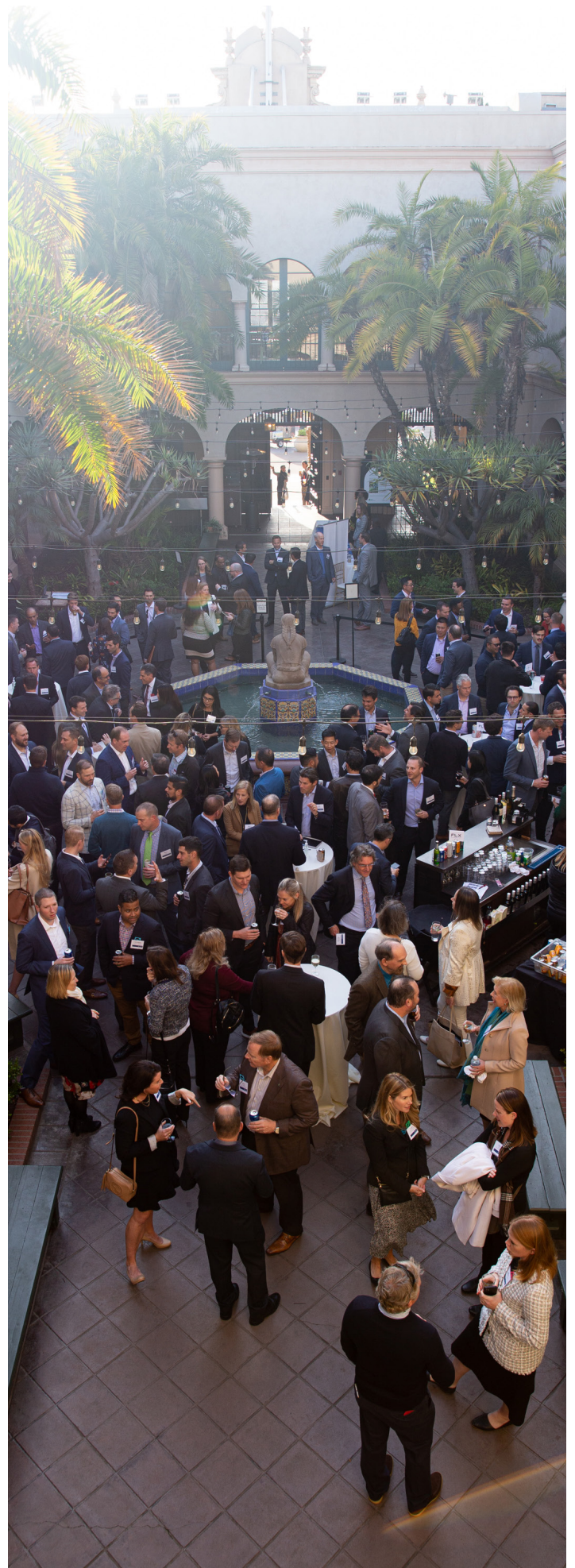
PROGRAM AGENDA

3³⁰ - 5³⁰ Registration and Cocktails

5³⁰ - 6³⁰ CFA Society San Diego Opening Remarks & Dinner

6³⁰ - 7⁰⁰ Forecast Contest & Speaker Presentations

7⁰⁰ - 7⁴⁵ Q&A Panel | Conclusion of the 2025 Forecasting Dinner



18th Annual Forecast Dinner

SPEAKER BIOGRAPHIES



SPEAKER

BRIAN BELSKI

Chief Investment Strategist,
BMO Capital Markets

Brian, Chief Investment Strategist and leader of the Investment Strategy Group, provides strategic investment and portfolio management advice to both institutional and private clients. Brian's group produces several investment strategy publications on a regular basis, with particular focus on both the U.S. and Canadian equity markets.

In his more than 32 years in the investment industry, Brian has held various senior strategy and research roles, including positions at Oppenheimer & Company, Merrill Lynch, and Piper Jaffray.

Brian is frequently quoted in the financial press, including regular appearances on CNBC and BNN, and is renowned for his accuracy as a strategist.

Brian has been ranked as a Top Gun analyst by Brendan Woods since 2016. He holds a B.Sc. degree from St. Cloud State University and splits his time between the BMO offices in New York and Toronto.



SPEAKER

JIM BIANCO

President & Macro Strategist
Bianco Research, LLC

Jim is President and Macro Strategist at Bianco Research, L.L.C. Since 1990 Jim's commentaries have offered a unique perspective on the global economy and financial markets. Jim has built a decades long reputation for objective, incisive commentary that challenges consensus thinking. In nearly 20 years at Bianco Research, Jim's wide ranging commentaries have addressed monetary policy, the intersection of markets and politics, the role of government in the economy, fund flows and positioning in financial markets.

Jim appears regularly on CNBC, Bloomberg and Fox Business, and is often featured in the Wall Street Journal, Bloomberg News, Grants Interest Rate Observer, and MarketWatch. Prior to joining Arbor and Bianco Research, Jim was a Market Strategist in equity and fixed income research at UBS Securities and Equity Technical Analyst at First Boston and Shearson Lehman Brothers. He is a Chartered Market Technician (CMT) and a member of the Market Technicians Association (MTA). Jim has a BS in Finance from Marquette University and an MBA from Fordham University.



MODERATOR

JANE WELLS

Jane Wells is an award-winning broadcast journalist who spent more than 40 years in the news media – much of that time at CNBC – before she retired from television in 2024. She's covered everything from earthquakes to riots, from the O.J. Simpson murder case to Mother Teresa's funeral, from the massacre at Columbine to the 2008 financial collapse. She's questioned CEOs about poor business decisions, posed as a prostitute for a story on AIDS, and appeared in the "Seinfeld" finale. Jane continues to moderate finance-related events...when she's not snorkeling on the Big Island. She's still trying to learn how to cook.



OUR MISSION

The mission of the CFA Society San Diego 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

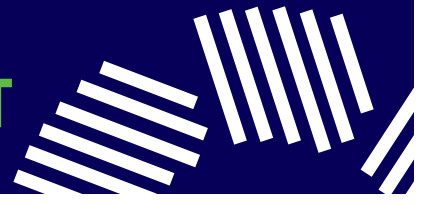
The CFA Society San Diego was founded in 1962 as the Financial Analysts Society of San Diego, Inc. to promote a high standard of ethics and sound professional standards of investment management and research, and to enhance professional knowledge and skills. The Society was admitted to the Association 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 San Diego, in order to more closely align with the CFA Institute and the Chartered Financial Analyst (CFA®) designation.

There are over 595 members of the CFA Society San Diego, including security analysts, portfolio managers, bankers, and other investment professionals. Approximately 570 CFA Society San Diego members hold the Chartered Financial Analyst designation. In addition, approximately 305 are currently candidates for this prestigious professional designation.

ABOUT THE SAN DIEGO FORECAST DINNER

This year marks our 18th annual Forecast Dinner, and we anticipate the event will draw over 280 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 2025 Forecasting Dinner will consist of a cocktail hour, dinner, two fifteen-minute presentations from speakers sharing unique perspectives on the market, and a thirty-minute Q&A speaker panel discussion led by Jane Wells. Each attendee will enjoy a cocktail reception and an exceptional three-course meal accompanied by wine.



ABOUT CFA SOCIETY SAN DIEGO

CFA Society San Diego promotes the highest ethical standards and professional excellence within the local investment community. CFA Society San Diego is an association of local investment professionals, consisting of portfolio managers, security analysts, investment advisors and other financial practitioners, that has served CFA charterholders and CFA Program candidates locally since 1962.

CFA Society San Diego is a member society of CFA Institute. There are 160 CFA societies around the world that support the mission of CFA Institute at a local level and provide members with career growth, information exchange, and professional networking opportunities.

ABOUT CFA INSTITUTE

CFA Institute is a global community of more than 200,000 investment professionals working to build an investment industry where investors' interests come first, markets function at their best, and economies grow. We develop and promote professional and ethical standards and administer the Chartered Financial Analyst credential, the Certificate in Investment Performance Measurement, and the CFA Institute Investment Foundations® program. For more information, visit www.cfainstitute.org.

SPONSORSHIP

CFA Society San Diego is a vital part of the San Diego investment community with over 595 members spanning the breadth of our industry. Partnering with CFA Society San Diego, either as a sponsor or an underwriter, positions your company in front of our constituents, providing exposure to and interaction with this targeted group of high-profile individuals over half of which transact on the buy side of our industry. Our events, which are directly marketed to more than 1,000 finance industry professionals from around the region, have a proven track record of providing great insight and generating interesting conversations, sure to entertain your clients and colleagues, and provide invaluable networking opportunities with the region's most talented investment professionals. To discuss sponsorship/underwriting opportunities, please contact sponsorship@sandiego.cfasociety.org.

CONTACT CFA SOCIETY SAN DIEGO

To find out more please visit: <http://www.cfasociety.org/sandiego>

Tel: 619.684.6228

E-mail: sponsorship@sandiego.cfasociety.org

MEMBER DEMOGRAPHICS as of June 2024

AVERAGE AGE

46

GENDER

85% Male / 15% Female

MEMBERSHIP TYPES

- 570 Charterholders
- 7 Affiliate Members

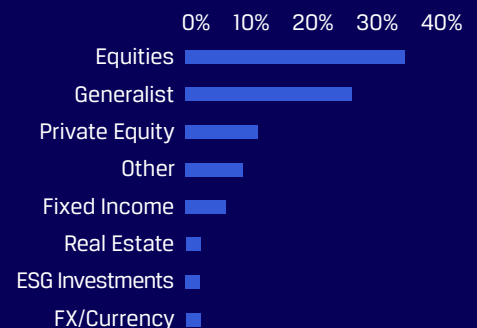
MAIN JOB FUNCTIONS

- Portfolio Manager
- Investment Analyst
- Private Wealth Manager
- Chief-Level Executive

TOP SAN DIEGO EMPLOYERS

1. Brandes Investment Partners
2. StepStone Group LLC
3. Meketa Investment Group
4. LPL Financial Holdings, Inc
5. ClariVest Asset Management
6. Chandler Asset Management, Inc
7. Corient
8. Weatherly Asset Management
9. Wells Fargo

PRIMARY INVESTMENT PRACTICE



18th Annual Forecast Dinner

UNDERWRITING OPPORTUNITIES



The Forecast Dinner is a unique opportunity for San Diego investment professionals to gather and discuss their thoughts for the 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 CFA Society San Diego 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 CFA Society San Diego.

UNDERWRITING OPPORTUNITIES*

COCKTAIL RECEPTION - \$1,500 each - 1 available

Firm logo on signage at cocktail reception tables

COCKTAIL APPETIZERS - \$1,500 each - 1 available

Firm logo on signage at cocktail reception buffets

DINNER WINE - \$750 each - 2 available

Firm name listed in event program

AUDIO VISUAL SERVICES - \$750 each - 2 available

Firm name listed in event program

PARKING FOR ATTENDEES - \$750 each - 2 available

Firm name listed in event program

STUDENT SCHOLARSHIP - \$1,000 each - 2 available

Provides admission for 3 university students to the dinner

Firm name listed in event program

(CFASSD will allocate admissions)

** All underwriting opportunities include one individual ticket registration to the dinner.*

CORPORATE TABLES

GOLD TABLE SPONSOR - \$2,800 each - 6 available

Premium Seating for 10

Premium logo positioning in the event program

Premium logo positioning in the welcome screen slide show

Firm logo on the table sign

SILVER TABLE SPONSOR - \$2,500 each - 6 available

Preferred Seating for 10

Preferred logo positioning in the event program

Preferred logo positioning in the welcome screen slide show

Firm logo on the table sign

BRONZE TABLE SPONSOR - \$2,000 each - 10 available

Seating for 10

Firm name on the table sign

INDIVIDUAL REGISTRATION

SOCIETY MEMBERS - \$175 each

NON-MEMBERS - \$225 each

18th Annual Forecast Dinner REGISTRATION FORM



UNDERWRITING OPPORTUNITIES:

- \$1,500 Cocktail Reception
- \$1,500 Cocktail Appetizers
- \$750 Dinner Wine
- \$750 Audio Visual Services
- \$750 Parking
- \$1,000 Student Scholarship

ATTENDEE RESERVATIONS:

	# Requested	Total \$ Amount
<input type="checkbox"/> Gold Corporate Table (for 10)	_____	at \$2,800 for _____
<input type="checkbox"/> Silver Corporate Table (for 10)	_____	at \$2,500 for _____
<input type="checkbox"/> Bronze Corporate Table (for 10)	_____	at \$2,000 for _____
<input type="checkbox"/> Individual (Member)	_____	at \$175 for _____
<input type="checkbox"/> Individual (Non-Member)	_____	at \$225 for _____
	Total	_____

PAYMENT OPTIONS:

- Check (Payable to CFA Society San Diego)
- Invoice Requested (Payment via check is greatly appreciated and the preferred method of payment.)

Total Amount: \$ _____

Organization Name (As you wish it to appear on the sponsorship publicity):

Mailing Address: _____

Primary Contact Name: _____

Primary Contact E-mail: _____

Authorized Signature: _____ Date: _____

If you have additional questions regarding sponsor opportunities please email to: sponsorship@sandiego.cfasociety.org or mail to: CFA Society San Diego, P.O. Box 928456, San Diego, CA 92192-8456

Cancelation Policy: All ticket and table reservations are nonrefundable beginning January 8, 2025. Underwriting opportunities are nonrefundable from date of purchase.

CFA Society San Diego will be taking photos and/or video at this event. By participating, you are giving us your permission to be in the photos and/or video. Photos and/or video may appear online and in social media.