



**CFA Society
Houston**



ANNUAL FORECAST DINNER

**February 1, 2023
RIVER OAKS COUNTRY CLUB**





CFA Society Houston

EVENT OVERVIEW

The Annual Forecast Dinner is CFA Society of Houston's flagship event. The select 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 2023.

AGENDA

5:30pm - 5:50pm **Networking and Check In**

5:50pm - 6:00pm **Attendees are seated**

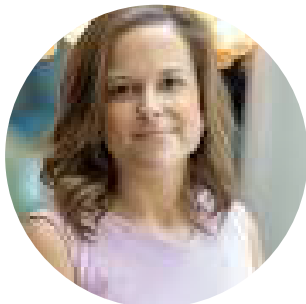
6:00pm - 6:15pm **President welcome and Introduction of Milestone Members**

6:15pm - 6:45pm **Dinner**

6:45pm - 7:00pm **Introduction of panelists by AFD Chairs**

7:00pm - 8:15pm **Program and Q&A**

MODERATOR



Catarina Saraiva

BLOOMBERG NEWS

Catarina Saraiva is the Dallas bureau chief for Bloomberg News and a reporter covering the Federal Reserve and the U.S. economy. Catarina focuses her economics reporting on the labor market and economic inequality along race, gender and income lines. Catarina has chronicled the pandemic's disparate impact on women, minorities and low-wage workers, the rise in food insecurity in the U.S. and the lack of diversity at the Federal Reserve. As Dallas bureau chief, she oversees a team of reporters covering metroplex issues and Texas business themes. Catarina has been at Bloomberg for 13 years and graduated from the University of North Carolina at Chapel Hill with degrees in journalism and Spanish, which she speaks fluently along with Portuguese and English.



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●● PANELISTS



Rob Arnott

Founder and Chairman, Research Affiliates

Research Affiliates is a global leader in smart beta, factor investing, and asset allocation. The firm creates investment strategies and tools based on award-winning research and delivers these solutions in partnership with some of the world's premier financial institutions. Rob plays an active role in the firm's research, portfolio management, product innovation, business strategy, and client-facing activities.

Rob has pioneered several unconventional portfolio strategies that are now widely applied, including tactical asset allocation and the Fundamental Index™ approach to investing. He has published more than 130 articles in such publications as the Journal of Portfolio Management, Harvard Business Review, and Financial Analysts Journal, for whom he served as editor in chief from 2002 through 2006. Rob has received eight Graham and Dodd Scrolls, which are awarded annually by CFA Institute to the top Financial Analysts Journal articles of the year. He also has received four Bernstein Fabozzi/Jacobs Levy awards from the Journal of Portfolio Management.

Rob received a BS summa cum laude in economics, applied mathematics, and computer science from the University of California, Santa Barbara.



Richard Bernstein

CEO/CIO, Richard Bernstein Advisors LLC

Richard Bernstein is the chief executive officer/chief investment officer of Richard Bernstein Advisors LLC.

Mr. Bernstein founded Richard Bernstein Advisors LLC (RBA) in 2009. The firm utilizes a unique top-down approach to investing, focusing on macro trends rather than individual stock selection. RBA is one of the fastest growing money management firms, is among Morningstar's Top 10 ETF Model Managers in assets and partners with some of the world's leading financial institutions.

Mr. Bernstein has over 40 years' experience on Wall Street, and was formerly the Chief Investment Strategist at Merrill Lynch & Co. Prior to joining Merrill Lynch in 1988, he held positions at E.F. Hutton and Chase Econometrics/IDC.



Carol Schleif, CFA, FSA

CIO, BMO Family Office

Carol Schleif is the Chief Investment Officer of BMO Family Office, an integrated wealth management provider that serves ultra-affluent individuals, families and family offices across their tax, estate, investment, philanthropic, risk and family capital needs. She is a voting member of the Asset Allocation Work Group and Investment committee as well as leading the Senior Investment Advisory Council for BMO Wealth Management.

Carol is an experienced investment leader with 40 years in the industry and has worked extensively with ultra-affluent families in the management and oversight of their investments. She has a deep understanding of the markets and portfolio construction and management across asset classes. She is a sought-after speaker and thought leader, and a frequent contributor to Bloomberg, Reuters and other financial media.



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 First Trust

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ABOUT

Founded in 1955, the CFA Society of Houston is one of the oldest CFA societies in the world. The society promotes the highest professional and ethical standards within the investment community and maintains ongoing educational and certification opportunities for its members. The Society allows individuals with common interests to advance their professional studies and obtain insight into key areas affecting investments.

2022-2023 LEADERSHIP

Giovanna Carollo Carter, CFA, CAIA
President

Todd Centurino, CFA
VP Programs

Janko Trenkoski, CFA, CAIA
Treasurer/Secretary

Steven Sheldon, CFA
Director

Jun Gu, CFA
Director

Lee Partridge, CFA
Director

Jason Leder, CFA
Director

Brian Sharpe, CFA
Director

MISSION

To be a strong local community of investment professionals in order to foster the exchange of ideas and knowledge in investment markets, promote the highest ethical standards, encourage members and non-members to earn the CFA designation, provide educational opportunities, and be advocates on issues that serve the interest of investors and society.

EVENTS, PROGRAMS, AND INITIATIVES

- Annual Forecast Dinner
- Weekly Luncheons
- CFA Institute Research Challenge
- Women in Investment Management
- Scholarship Opportunities
- Mentorship Program
- Education Initiatives
- New Charter Award Ceremony
- Webinars and Virtual Events
- Spring/Fall Social
- Networking Happy Hours
- Book Club

1023

Total Members

86%

Male

14%

Female

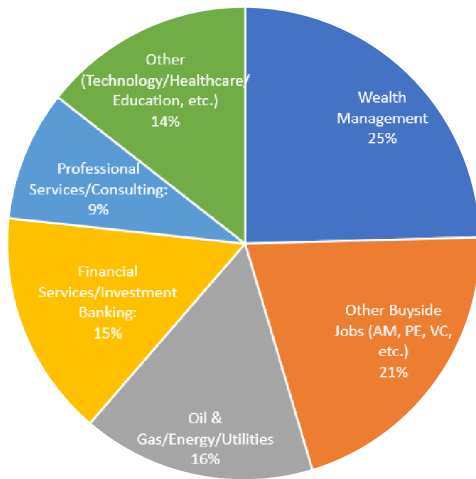
48 Years

Average Age

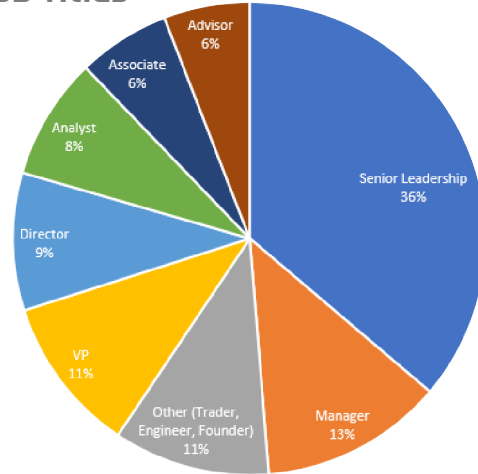


CFA HOUSTON BY THE NUMBERS

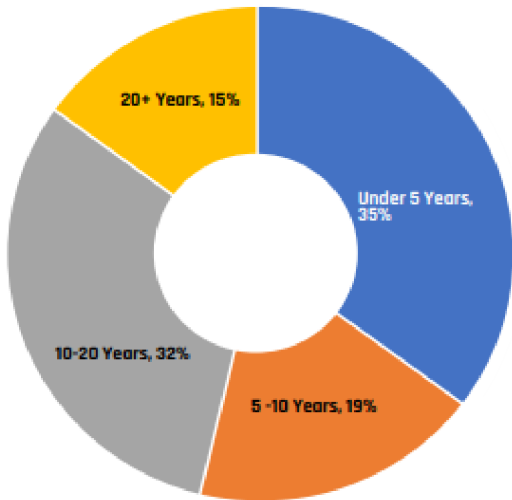
Industry Representations



Job Titles



Member Milestones



Top Employers

- Invesco
- Ernst & Young
- J.P. Morgan
- Bank of America
- BP
- Fayed Sarofim & Co.
- Morgan Stanley
- Vaughan Nelson Investment Management
- Phillips 66
- Citi
- Sentinel Trust
- AIG
- Deloitte
- Northern Trust
- Wells Fargo
- BBVA
- Bridgeway Capital Management
- Goldman Sachs
- Shell

Contact Us

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 www.cfasociety.org/houston

Disclaimer: The above data are based on information provided voluntarily by CFA Houston Society members.





CFA Society Houston

BENEFITS OF MEMBERSHIP

- Includes tickets for 30+ events, luncheons and special meetings held annually.
- Network with peers in the industry.
- Be part of a common voice to develop and protect the interests of the profession.
- Stay abreast of trends that affect the industry in your market.
- Take advantage of local professional development opportunities.
- Socialize with industry insiders.
- Take advantage of discounts to dynamic and educational local programs.
- Access additional resources, such as job announcements and newsletters.

2023 Events

JANUARY 11

Jeffrey Sherman, CFA - CIO - DoubleLine

JANUARY 18

Crypto Panel with Eyhab Aejaz (Co Founder and CEO, Breach Insurance), Hannah Siegel Gardner (Chief Marketing Officer - Art Blocks) and Gene A. Grant II (CEO and co-founder of LevelField Financial)

JANUARY 25

Richard Seewald -Founding and Managing Partner - Evolution Equity Partners

JANUARY 26

Book Club

February 1

Annual Forecast Dinner

FEBRUARY 8

Simeon Hyman, CFA, - Head of Investment Strategy - ProShares

FEBRUARY 15

Alejandra Grindal - Chief Global Economist - Ned Davis Research

FEBRUARY 22

Bobby Mintz - Senior Vice-President of Sales and Celebrity Relations TRISTAR Productions, Inc - Tristar Productions

FEBRUARY 23

Women in Investment Management

March 1

Apurva Mehta -Managing Partner - Summit Peak Ventures

March 8

Peter DiFiore, PhD, CAIA, - Managing Director - Neuberger Berman

March 9

Book Club

March 22

TBD

March 29

Spring Social

APRIL 5

David Giroux, CFA - Chief Investment Officer of US equity and multi-asset and portfolio manager, and Head of Investment Strategy - T Rowe Price

APRIL 6

Women in Investment Management

APRIL 12

TBD

APRIL 19

JoAnne Bianco, CFA - Partner - BondBloxx Investment Management

APRIL 20

Book Club

APRIL 26

Pedro Palandrani -vice president and director of research - Global X

MAY 3

Marc Faber, PhD - Economist and Market Forecaster - Publisher of Gloom Boom and Doom Report

MAY 10

GQG Investigative Journalist

MAY 11

Women in Investment Management

MAY 17

Annual Meeting at Casino Night



35+ YEARS

Joan Chasan Alford • Lanny C. Barbee • Leia Powell Carpenter • Thomas R. Copper • Joseph T. Dabney
Juliet Ellis • J. Philip Ferguson • M. Lucinda Freeman • Michael Edward Garrett • Bruce G. Garrison
James A. Gilligan • Dan Hall Hinds • Edward A. Hirs • Sharon K. Keith • Frank P. Lee • Myra L. Mayer
Edward S. McCullough • Michael A. Meagher • David A. Morris • Vivian A. O'Leary • Nancy E. Pustka
James E. Rickenbacker • Ronald J. Stapleton • Jake Taylor • Robert Paul Teten • Stephen D. Turman
Shailesh J. Vyas • Elizabeth D. Williams • Catherine S. Woodruff

30 YEARS

John E. Camp • William C. Conroy • Leslie B. Fox • Ruth A. Georgeson • Timothy Shawn Hartzell
Carla Knobloch • Otto W. Meyers • Stephen B. Schaller • Pat H. Swanson

25 YEARS

Judson E. Bailey • Douglas L. Becker • William R. Berger • Anthony Wayne Bohnert
Samuel Jones Brown • Megan T. Goodfellow • Scot W. Johnson • Richard E. Kaplan • Erik G. Konicki
Robert C. Leslie • William D. Leven • Timothy R. Lindvall • Audrey Mather Lokker
Christopher B. Mueller • Glenda Sue Overbeck • Robin E. Pacholder • Joaquin Sanchez-Hernandez
S. Stephen Thacker • Jon Carter Vaughan • Douglas R. Wynkoop • John Steven Yovanovic

20 YEARS

Thomas Bernard Bastian • Eitan E. Bernstein • Robert William Botard • Schuyler Harold Clark
Donald W. Coon • Jeffrey E. Curtiss • Peter M. DeFazio • Antonio G. Fernandez • Jill Foote
Duncan Charles Frearson • Roger Craig Fulton • Cameron Wagon Greenwood
Michael Michael Hajtman • Michael J. Hanna • Todd Edward Hanslik • Curtis Joel Holden
Erich A. Holzer • John Henry Homier • John R. House • Jeffrey Michael Jacobs
Kevin Andrew Kennison • Charles A. Linn • Ravindhra K. Meka • Paul David Nelson • Todd Smurl
Aaron J. Stai • Jon Paul Stark • Todd Vaubel • Richard K. Young

15 YEARS

Devin E. Armstrong • Brent Alexander Arriaga • Kristina Junco Bradshaw • William Hollis Cruise
David M. Dasari • Greg Determann • Robert G. Gwin • Kristen Kolle Habich • Elena Ippolitova
Jeffrey W. Kennedy • Patsopon Khananusapkul • Fabio Andres Leal Torres • Farhad Mammadbayov
Jeremy Michael Robin • Michael A. Rohrig • Scott M Sutherland • Bijan Robert Taslimi
Joe Lewis Toomer • Jason S. Walker • Torsten A. Wucherpennig • Yanyan Katherine Zhang

10 YEARS

Scott Randall Baukney • Jeffrey Andrew Bridge • Matthew Russell Byrd • Juan Carlos Cantu Gonzalez
Samuel Anthony Cashiola • Daniel Patrick Connally • James Michael Drickamer • Mauricio Franco
Mark A. Gram • Cameron Jeffrey Horwitz • Steve Song Hu • Kirit N. Jha • Joseph Micah Johnson
Leah Jordan • Srikrishnan Lakshmanan • Tyler Dean Lane • Amanda Riecke Monguillot
Jennifer Korinne Mott • Stanton Roth Piland • Tobin James Reiff • He Ren • Guillermo Sanchez Guzman
Brian D. Sharpe • Marc D Shmerling • Yang Tu • Trent David Twaddle • Abigail Laure Valdelievre
Erik J. Voss • Haowei Yang • Shiu Hang Kenny Yip



CFA Society ●● 2022 New Charterholders Houston

- Mr. Arsalan Abdul Qadir, CFA
- Ms. Vineeta Agrawal, CFA
- Mr. Carlos Aranda Gonzalez Guerra, CFA
- Mr. Greg Ashcroft, CFA
- Mr. Kevin Dwayne Authur, CFA
- Mr. William Duncan Blake Finley, CFA
- Mr. Joris Michael Henri Buffa, CFA
- Mr. Chuanqi Chen, CFA
- Mr. Johann Cherian, CFA
- Ms. Megan Elizabeth Cline, CFA
- Mr. Austin DeShane, CFA
- Ms. Sarah Caitlin Dolan, CFA
- Mr. Zachary Harris, CFA
- Mr. Ye Hao, CFA
- Mr. Alexander David Hart, CFA
- Ms. Yufan He, CFA
- Mr. Kanen Pierce Helbig, CFA
- Mr. Haoyu Jin, CFA
- Mr. Jeffrey Kok, CFA
- Mr. Michael Dennis Mulcahy, CFA
- Mr. Drew Kyle Nelson, CFA
- Mr. Douglas Hilliard Parker, CFA
- Mr. Olanrewaju Isaac Shogbola, CFA
- Mr. Wyatt Carlton Stovall, CFA
- Mr. Stefan Michael Szlendak, CFA
- Mr. John Waight, CFA
- Ms. Yisi Wang, CFA
- Mr. Ryan Keith Weaver, CFA
- Mr. Guozhen Yang, CFA
- Ms. Jiuying Ye, CFA
- Mr. Chao Zhang, CFA



CFA Society Houston

●● CFA Society Houston Scholarship Fund

The CFAH Scholarship Fund, a 501(c)(3) organization, was established as a separate legal entity in April 2002. Contributions to CFAH Scholarship Fund have since been tax-deductible to the extent allowed by law. The activities of CFAH Scholarship Fund currently include awarding scholarships to local university students expressing interest in a career in the investment decision-making profession. The scholarship committee is responsible for reviewing and selecting the recipients.



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2022-2023
Scholarship Recipients

CONGRATULATIONS TO THESE WELL DESERVING STUDENTS!



Colin Wilson
Texas A&M University



Rehan Murad
University of Houston



Ritvij Srivastava
Rice University



Aman Nathani
University of St. Thomas

FIND OUT MORE ABOUT OUR SCHOLARSHIP
RECIPIENTS AT WWW.CFASOCIETY.ORG



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**A special thank you to
all of our sponsors,
members, and volunteers**