



January 12, 2018

What's Coming Up in 2018?

New registration system coming for 2018!

Registration is open for the events highlighted in blue!
Thanks for your patience in learning the new registration system!
More event registration open soon!

| | |
|-------------|---|
| January 24 | <u>Dan Fuss Loomis Sayles, Charter Awards Lunch</u> |
| January 31 | <u>Candice Tse, Goldman Sachs, Forecast Lunch</u> |
| February 7 | Leigh Drogen, Estimize, Crowd Sourced Earnings |
| February 14 | <u>Paz Grimberg, Water Island, Cybersecurity</u> |
| February 28 | <u>Morningstar, Tayfun Icten, Liquid Alteraitives</u> |
| March 7 | <u>Ben Hunt, Salient, Epsilon Theory</u> |
| March 14 | William Gilchrist, Westfield Capital, Automotive Automation |
| March 21 | Dan Walsh, CityMark Capital, Cleveland Real Estate Update |
| April 11 | Lunch at Federal Reserve Bank of Cleveland |
| May 2 | Ari Paul, Blocktower Capital, Cryptocurrencies |
| May 16 | Author Jeff Gramm, <u>Dear Chairman</u> |
| May 23 | Diversity in Finance <u>Series, Women's Panel</u> |
| June 30 | Member Town Hall - what do you want? |
| June 6 | Brian Kraus, CFA, Hartford Funds |
| June 14 | Annual Members Night, Punch Bowl Social Club |

CFA Society Cleveland members please login to your CFA Institute account to receive member pricing at checkout. LOGIN BUTTON CAN BE FOUND ON THE RIGHT SIDE OF CLE PICTURE. Trouble logging in? Please call CFA Institute at (800) 247-8132 for help. CFA Society Cleveland local members will need to set up an account with CFA Institute to receive member pricing at checkout.

Not a Charterholder? Not a problem. You can join CFA Society Cleveland as a local member for \$150 per year and attend our events! Events are free when you are a member!

[DOWNLOAD THE CFA INSTITUTE MEMBER APP](#)
[CFA Cleveland Membership Application](#)

**CONGRATULATION TO OUR 30 NEW
2017 CFA INSTITUTE CHARTERHOLDERS**

JOIN US FOR OUR CHARTER LUNCH

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**JANUARY 24, 2017
FEATURING DAN FUSS, LOOMIS SAYLES**



**Evan Affinito, CFA
Robert Aurand, CFA
Thomas Boltja, CFA
Gregory Brancazio, CFA
James Braun, CFA
Joseph Cady, CFA
Huaiyi Chen, CFA
Thomas Cohn, CFA
Jonathan Dominy, CFA
Sean Egan, CFA
Christopher Eggleton, CFA
Scott Frye, CFA
Kevin Harper, CFA
Richard Harris, CFA
Jacob Heacox, CFA**

**Lingjun Jiang, CFA
Matthew Keen, CFA
Yichao Mark, CFA
Ryan Mills, CFA
Christopher Muirhead, CFA
Peter Nordell, CFA
Paul Salibi, CFA
Jeff Stark, CFA
David Stratton, CFA
Paul Tay, CFA
Matthew Thies, CFA
Kyle Varrone, CFA
Nathan Willi, CFA
Russell Wilson, CFA
Brian Woods, CFA**

New charterholders, please invite friends, family, and your boss to attend the awards ceremony. Email cfa@cleveland.cfasociety.org to RSVP. Attendance is free for you and your guests.

**Join CFA CLE for our Annual Charter Awards Lunch
featuring Dan Fuss, Loomis Sayles
January 24, 12pm**

The City Club

[REGISTER HERE](#)

Bond Market Outlook

New Charterholders please email cfa@cleveland.cfasociety.org to RSVP. Please feel free to invite, friends, family and co-workers to join us for the awards ceremony lunch and Dan Fuss's presentation.



Dan Fuss has 58 years of experience in the investment industry and has been with Loomis, Sayles & Company since 1976. He is vice chairman of the firm's Board of Directors and manages the firm's flagship Loomis Sayles Bond Fund-which won the 2009 Morningstar Fund Manager of the Year award in the fixed income category-in addition to the Loomis Sayles Investment Grade Bond, Investment Grade Fixed Income, Strategic Income, Fixed Income, Institutional High Income and Global Equity and Income funds. In 2012, Dan received both the Institutional Investor Money Management Lifetime Achievement Award, and the Lipper Excellence in Investing Award. In 2013, Dan received the CFA Society of Milwaukee Lifetime Achievement Award. In 2000, he was named to the Fixed Income Analysts Society's Hall of Fame in recognition of his contributions and lifetime achievements toward the advancement of the analysis of fixed income securities and portfolios. He has twice been president of the Boston Security Analysts Society. Dan earned a BS and an MBA from Marquette University. He served in the US Navy from 1955 to 1958 and held the rank of Lieutenant.

Charter Awards Luncheon Sponsored



What To Expect in 2018?

**Join us for our Forecast Lunch featuring
Candice Tse, Goldman Sachs
Vice President, Market Strategy
January 31, 12PM
The City Club**

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2017 Forecast Winners will be awarded!!!

**Luncheon Sponsored by
Goldman Sachs**



Candice is a vice president in the Market Strategy team of Strategic Advisory Solutions. She is responsible for economic and market strategy, along with client engagement on investment solutions.

Prior to her current role, Candice worked in Fundamental Equity Product Management, Institutional Sales with a focus on relationship management and business development, and as a team leader for institutional equity in portfolio administration. Her areas of expertise include Womenomics and emerging markets.

Candice earned a B.S. in Marketing, Magna Cum Laude, from Rutgers University and an MBA in Finance and Management from Columbia Business School.

**Paz Grimberg, Water Island Capital
February 14, 2018 12PM
The City Club**

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Cybersecurity: Get Your Business Security in Check

Luncheon Sponsored by



Mr. Grimberg joined Water Island Capital in 2015 as a Quantitative Analyst and Software Developer. Mr. Grimberg has also been tasked with helping to lead Water Island Capital's cybersecurity and risk management efforts.

Prior to joining Water Island Capital, Mr. Grimberg was an officer in the Israel Defense Force's elite cyber unit (Unit 8200), where he performed mathematical decryption of block ciphers, managed vulnerability research in internet protocols such as TCP/IP, HTTP, and DNS, and led the instruction of new recruits. Mr. Grimberg was a recipient of Israel's most prestigious national security award, the Israeli Defense Award, for outstanding contributions to homeland security.

Mr. Grimberg also worked at WR Hambrecht and Alpha-Beta Investment Strategies.

Mr. Grimberg received a Master of Financial Engineering from University of California, Berkeley, and a BSc in Computer Science and Mathematics and MSc in Applied Mathematics from Tel Aviv University.

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CFA Society Cleveland, 24199 Lyman Blvd, Shaker Heights, OH 44122

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