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**Pat Dorsey, CFA**  
*Director, Equity Research*  
**Morningstar, Inc.**

Dorsey is the author of *The Five Rules for Successful Stock Investing: Morningstar's Guide to Building Wealth and Winning in the Market* and *The Little Book that Builds Wealth: The Knockout Formula for Finding Great Investments*. He is responsible for the overall direction of Morningstar's equity research, as well as for communicating Morningstar's ideas to the media and clients.

Dorsey joined Morningstar in 1998 as a senior equity analyst covering the telecommunications equipment and computer hardware industries, and became head of Morningstar's equity research team in 2001. He played an integral part in the development of Morningstar's economic moat ratings and the methodology behind Morningstar's framework for competitive analysis.

Dorsey holds a bachelor's degree in government from Wesleyan University and a master's degree in political science from Northwestern University. He also holds the Chartered Financial Analyst (CFA) designation. Dorsey appears weekly on the "Bulls & Bears" show on the Fox News Channel and writes a monthly column for *Money*.

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**Thursday, June 10<sup>th</sup>**

**11:45 AM**

**Oak Hill Country Club**

346 Kilbourn Road  
Rochester, New York 14618

**Please RSVP on or before Tuesday, June 8<sup>th</sup> by:**

**E-mail: [cfarochester@frontiernet.net](mailto:cfarochester@frontiernet.net)**

**Telephone: Sue Gleason at 671-0517.**

**Cost is \$10 per person for society and lunch members; \$5 for student members (Students must first apply for membership and be approved for the discounted rate); and \$20 for guests.**

For information or to apply for membership please email our Membership Committee Chairman Damian Weidmann, CFA at [dweidmann@hotmail.com](mailto:dweidmann@hotmail.com).

The society has to guarantee a minimum number of reservations prior to the meeting. We will be billed for the number of reservations we place, therefore, we have to bill members that make reservations but do not attend the meeting. However, if you cancel your reservation before the meeting you will not be billed.

Gerald Furciniti, CFA  
Program Chairman

**Remember to visit our website for upcoming events and job postings.**

**[www.cfarochester.org](http://www.cfarochester.org)**