



**CFA Society
Cleveland**

3RD ANNUAL WEALTH MANAGEMENT CONFERENCE

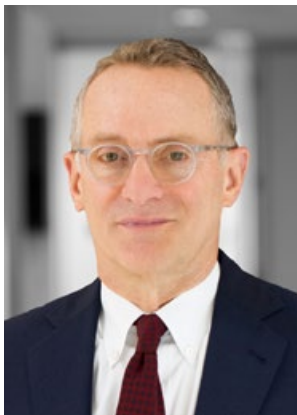


September 11, 2019

11:30AM to 5:00PM

The Silver Grille at the
Ritz Carlton, Tower City
200 W. Prospect Avenue,
Cleveland, Ohio 44113

Join leading financial industry professionals for the CFA Society Cleveland's 3rd Annual Wealth Management Conference. The event will feature lunch, four presentations, and happy hour to network with colleagues, clients and industry leaders.



HOWARD MARKS
Oaktree Capital

**Featuring Keynote Speaker
Howard Marks, Oaktree Capital**

AGENDA

11:30AM - 12:15PM

Lunch

12:15 - 1:00PM

Dr. Giovinazzo, Fuller Thayer

1:15 - 2:00PM

Howard Marks, Oaktree Capital

2:15 - 3:00PM

Jean Dunn, T. Rowe Price

3:15 - 4:00PM

TBD

4:00 - 5:00PM

Networking Happy Hour
The Silver Grille

CFA SOCIETY CLEVELAND

510 Members

75% Charterholders

Roughly 90% of our members
work directly within the field of
investments.

Approximately 33% are
responsible for managing
assets of private individuals
+54% of members work on
the buy-side.

Portfolio Manager: 34.0%

Research Analyst: 15.4%

Chief Executive: 9.4%

Consultant: 8.1%

Relationship Manager: 7.0%

Risk Manager: 5.4%

Financial Advisor: 3.8%

Corporate Financial Analyst: 2.2%

Investment Banking Analyst: 2.2%

Other: 2.4%

CONFERENCE SPONSORS

GOLD

T. Rowe Price

SILVER

Fidelity, Invesco, John Hancock

BRONZE

American Beacon, BlackRock, J.P. Morgan, Kayne Capital,
MFS, State Street, Schwab, Vanguard, White Oak

Free to CFA Cleveland and

CFA Institute Members

\$79 for Non Members

\$500 for Tables of 8

Sponsorships Available

Call 216-696-8066 or email

cfa@cleveland.cfasociety.org

for more information