

UPCOMING EVENTS

January 29, 2014

CFA Society Seattle Book Club

The Misbehavior of Markets: A fractal view of financial turbulence
Seattle, WA

January 30, 2014

CFA Society Seattle Research Challenge | Seattle, WA

February 6, 2014

Winning in Business is a Team Sport | Seattle, WA

March 18 & 19, 2014

America's Region Research Challenge | Denver, CO

May 4 – 7, 2014

67th CFA Institute Annual Conference | Seattle, WA

Visit www.cfaseattle.org for further information.

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Seattle**



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CFA Society Seattle

OUR MISSION

Created in 1974, CFA Society Seattle is dedicated to professional excellence, integrity, education, volunteer service and strength of community. CFA Society Seattle has over 900 members representing all major institutional investment firms in the Puget Sound region. CFA Society Seattle is a local society for CFA Institute®, Charlottesville, Virginia. www.cfainstitute.org.

CFA Society Seattle is a local, non-profit organization that serves the needs of members by:

- Providing a forum for the exchange of information, education and ideas among the investment community;
- Enhancing members' investment knowledge and professional practices;
- Encouraging high ethical standards and professional conduct among all participants in the investment industry; and
- Fostering a culture of inclusion, diversity and respect among investment professionals.

2013 - 2014 CFA SOCIETY SEATTLE OFFICERS, TRUSTEES & COMMITTEE CHAIRS

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PRESIDENT'S WELCOME

Welcome to the 11th Annual CFA Society Seattle Economic Forecast Event

We thank you for joining us at the Puget Sound region's premier financial community event! CFA Society Seattle volunteers and staff have worked countless of hours to pull together what has become a highly anticipated annual program and we encourage you take full advantage of not only the educational aspect of the evening but the wonderful networking opportunity as well.



CFA Seattle has enjoyed a busy, exciting year as we work closely with the CFA Institute on organizing their 67th Annual Conference to be hosted in our beautiful city of Seattle. Do not miss this opportunity on May 4-7, 2014 to learn from our industry's top economists, investors, bestselling investment authors, and governmental and regulatory leaders who share insights on today's most critical investment issues. They anticipate up to 1,800 investment professionals from around the world to convene in our city for three days. If you or your firm would like to learn more please visit <http://annual.cfainstitute.org> or stop by our information booth in the lobby.

On behalf of the CFA Seattle Forecast Event Team, Board of Directors and Committee Chairs, thank you for your support and enjoy the evening!

Kristi Lord, CFA
President

FORECAST EVENT TEAM

Pam Cahill

Amber Fowler

Dylan Kelly

Brian Rowe, CFA

Jason Ye

Alan Randell-Chen

CJ Hall

Kristi Lord, CFA

David Simpson

Nick Zeppa

Cheryl Fang

Ufuk Ince, Ph.D., CFA

Andy Loechl, CFA

Sherrie Trecker, CFA

EVENT CHAIR WELCOME

Annually the CFA Society Seattle hosts an Annual Economic Forecast event featuring prominent members of the financial community. This year we were are delighted to host Henry H. McVey with Kohlberg Kravis Roberts & Co. On behalf of the entire Forecast Dinner Team, many thanks to our event Underwriters, Table Sponsors, Academic Sponsors, and volunteers for your enthusiastic support. **Brian Rowe, Past President & CFA**

GUEST SPEAKER



Henry H. McVey

Member & Head of Global Macro
and Asset Allocation
Kohlberg Kravis Roberts & Co.

Sincere appreciation to this evening's Platinum Underwriter, Russell Investments.
Please join Mr. Jeff T. Hussey, CFA in welcoming Mr. McVey to the stage.

Jeff T. Hussey, CFA

Global Chief Investment Officer



EVENING PROGRAM

4:30 pm | Networking Reception

Hosted bar and delicious Pacific Northwest Cuisine prepared by Four Seasons Executive Chef Kerry Sear

6:00 pm to 7:15 pm | Evening Program

Forgeron Cellars and Woodward Canyon Nelms Road wine will be served

7:15 to 8:00 pm | Post-Event Reception

Coffee and dessert reception

CONNECT WITH US!



CFA INSTITUTE RESEARCH CHALLENGE

The 5th Annual Investment Research Challenge includes the participation of three Puget Sound universities including Seattle University, the University of Washington – Seattle, and Pacific Lutheran University. We are excited that each team is represented here tonight so please seek them out and introduce yourself!

The CFA Institute Research Challenge is an annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis. Students gain real-world experience as they assume the role of a research analyst and are tested on their ability to value a stock, write an initiation-of-coverage report, and present their recommendations. The winner of this year's competition will advance to the Americas Regional competition at the Grand Hyatt Denver on March 18 and 19, 2014 in Denver, CO.

2014 mentors are: Dominic Cozzetto, CFA for Seattle University | Matt Griffith, CFA for University of Washington | and Greg Eisen, CFA for Pacific Lutheran University.