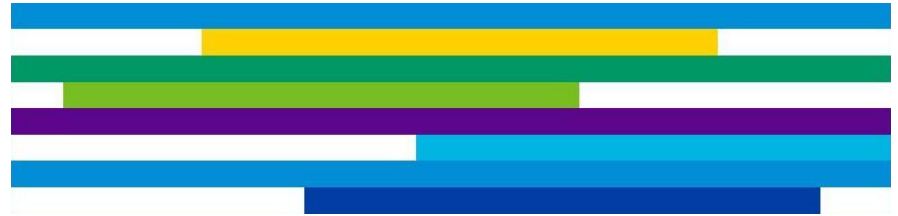


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14th Annual Economic Forecast Dinner

January 19, 2017

5 PM – 9 PM

Sheraton Seattle Hotel

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MISSION & VISION

Our mission is to advance our members' investment knowledge and careers by providing educational and networking opportunities, while promoting the CFA charter and investment ethics in the Puget Sound region.

Our vision is to establish a trusted community of knowledgeable investment experts in the Puget Sound region.

PRESIDENT'S WELCOME

I like to tell candidates and new charterholders that the CFA designation is more than just a piece of paper; it's more than three challenging exams and hundreds of hours of study. The CFA designation represents a community. Once you earn your charter, you are part of a global community with over 130,000 members. You can go almost anywhere in the world and be recognized for your achievement.

CFA Society Seattle proudly represents the Puget Sound Region with over 1,000 members. The Forecast Dinner hosts the largest annual gathering of those members, and is only made possible by each of you.

On behalf of our members, the Board of Trustees, the dedicated staff, and committed volunteers, we would like to thank our sponsors for their generous support, our speakers for taking the time share their insights and wisdom, and all of you for making this a special evening. Please take advantage of this opportunity to catch up with old colleagues and forge new connections. Enjoy the evening!

Dylan Kelly, CFA
President | CFA Society Seattle



TWEETING THE EVENT?

Be sure to include #CFASeattle!



FORECAST DINNER TEAM

Kim Barlow Giorah Bour, CFA Olga Bystrova, CFA Pam Cahill
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Phill Rogerson, CFA Maria Schmeiser, CFA Lesa Sroufe, CFA
Niyada Taraka Sherrie Trecker, CFA Jorge Valcarcel, CFA Annika Williams

EVENING PROGRAM

4:30 PM | Registration Opens

5:00 PM | Networking Reception

6:00 PM | Dinner Program Begins

6:25 PM | Welcome & Introductions

Dylan Kelly, CFA | President, CFA Society Seattle

6:45 PM | Carmel Wellso, Director of Research
Janus Capital Group

7:30 PM | Amity Shlaes

NYT Bestselling Author & Chair, Coolidge Foundation

8:30 PM | Concluding Remarks

Dylan Kelly, CFA | President, CFA Society Seattle

EVENT CHAIR WELCOME

Welcome to our 14th Annual Forecast Dinner! We are delighted to have two distinguished speakers and looking forward to hear their unique perspectives on what to expect with the markets and the economy. Carmel Wellso will leverage her extensive background in global capital markets to share her views on “Equities under the New Regime.” Our keynote speaker, NY Times four-times bestselling author and renowned economic historian Amity Shlaes will tie the roots of the ongoing political upheaval to “The Forgotten Man” (a term coined by her a decade ago) and how that may translate into economic policy and market outcomes in the near future.

This evening would not be possible without the generous support of our metal sponsors, table sponsors, academic sponsors and volunteers. Thank you and enjoy the evening!

Ufuk Ince, Ph.D., CFA & Past President



KEYNOTE SPEAKERS

Amity Shlaes, Author

Amity is the author of four *New York Times* bestsellers, *Coolidge*, *The Forgotten Man: A New History of the Great Depression*, *The Forgotten Man/Graphic Edition*, a cartoon book, and *The Greedy Hand*. *The Forgotten Man* has been called the finest history of the 1930's ever written. A veteran journalist, Shlaes writes for *Forbes* and *National Review*, and spent over 10 years as a columnist for the *Financial Times* and Bloomberg. Shlaes chairs the jury of the prestigious Hayek Prize, a \$50,000 prize for free market journalism, and chairs the board of the Calvin Coolidge Presidential Foundation, which is an expanding national foundation honoring the American president known for his restraint in government and civility.



Carmel Wellso, Director of Research | JANUS CAPITAL GROUP



Carmel leads the global equity research effort at Janus. Her responsibility is to maintain a powerful and successful investment culture by attracting and retaining strong analysts, managing global research coverage, driving independent research, and collaborating with portfolio managers and the Head of Investments. As head of the Portfolio Oversight Team for Janus' Research strategies, Carmel helps to oversee the Janus Research strategies, which consist of the best ideas of her analyst team. Since June 2010, she has been a Co-Portfolio Manager on the Janus International Equity strategy.

EVENT MODERATOR

Anjanette Kallas, CFA | T. ROWE PRICE

Anjanette (Anjie) Kallas is a vice president of T. Rowe Price Investment Services, Inc., and is a regional sales manager in the U.S. Intermediaries –Financial Institutions Group serving Western U.S. RIA and Regional Bank clients. She serves on the Board of the CFA Society San Francisco, earned the Chartered Financial Analyst designation, and is a Series 7 and 63 registered representative.

