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CFA Society Seattle

15th Annual Economic Forecast Dinner

January 25, 2018
5 PM – 9 PM
Hyatt Olive 8 Hotel

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UPCOMING EVENTS

Volatility: The Great Disappearing Act
February 6, 2018 | The Rainier Club

What You Can Expect from ESG Investment: A Japanese Case Study
February 12, 2018
Paccar Hall, Room 292 | University of Washington

2018 Research Challenge Oral Presentations Networking Opportunity
February 13, 2018 | The Rainier Club

2018 Private Wealth Management Event
July 18, 2018 | Sheraton Hotel Seattle

CFA SOCIETY SEATTLE 2017–2018 LEADERSHIP

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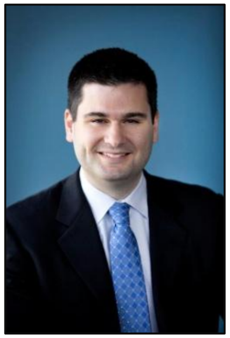
Dylan Kelly, CFA
Russell Investments

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



One constant in the life of an investment manager is change. Each year, our profession is faced with new challenges as we strive to help our clients achieve their financial goals. Innovations in the industry have led to new asset classes, lower fees, and more transparency for investors. At the same time, time-tested investment truths remain as the building blocks for successful investment strategies. In my view, our profession is at its best when we figure out how to best blend the old with the new to improve outcomes for our clients. It is in this spirit that we gather here tonight at the Annual CFA Society Seattle Forecast Dinner.

Our goal at CFA Society Seattle is to add value for our over 1,000 members by providing educational content, networking opportunities, and promoting the charter in the local community. Underlying everything we do is a deep focus on investment ethics and always putting the interests of our clients first. On behalf of our members and staff, thank you for being here to share the evening with us. We would particularly like to thank our sponsors for their generous support, which enables us to put together this annual gathering of colleagues and friends. Enjoy the evening!

Matt Griffith, CFA
President | CFA Society Seattle

TWEETING THE EVENT?

Be sure to include #CFASeattle

FORECAST DINNER TEAM

Kim Barlow   Pam Cahill   Lisa Cavallari, CAIA   Amber Fowler
Thomas Garrett, CFA, CAIA   Matt Griffith, CFA   Dylan Kelly, CFA
Michael Steingold, CFA   Lesa Sroufe, CFA   Niyada Taraka
Sherrie Trecker, CFA   Annika Williams   Nick Zeppa

EVENING PROGRAM

4:30 PM | Registration Opens

5:00 PM | Networking Reception

6:20 PM | Welcome Remarks
Matt Griffith, CFA | President, CFA Society Seattle

6:30 PM | Speaker Presentations Begin

Nili Gilbert, CFA
Co-Founder & Portfolio Manager
Matarin Capital

Carol Schleif, CFA
Deputy Chief Investment Officer of Asset Management
Abbot Downing

Savita Subramanian
Head of U.S. Equity & Quantitative Strategy
B of A Merrill Lynch Global Research

8:45 PM | Concluding Remarks
Matt Griffith, CFA | President, CFA Society Seattle

EVENT CHAIR WELCOME

Welcome to our 15th Annual Forecast Dinner!

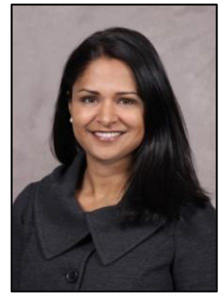
We are honored to be hosting three distinguished speakers: Nili Gilbert, CFA, Carol Schleif, CFA, and our keynote Savita Subramanian. They will be sharing their unique insights and expertise on our global investment environment. We are excited that each of them will be able to integrate ESG and Impact Investing to help us navigate the complex global markets.

This event would not be possible without the generous support of our underwriters, table sponsors, academic sponsors, staff and volunteers. Please take a moment to thank them for their valuable contributions.

Thank you and enjoy the evening!

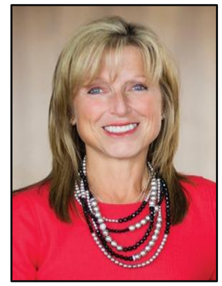
Dylan Kelly, CFA
Past President | CFA Society Seattle

GUEST SPEAKERS



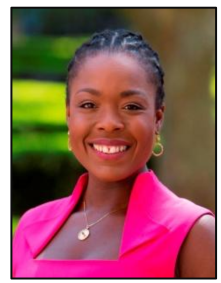
SAVITA SUBRAMANIAN

Savita Subramanian is the head of U.S. Equity & Quantitative Strategy at B of A Merrill Lynch Global Research. She is responsible for determining forecasts for the S&P 500 and other major U.S. indices, determining US corporate earnings forecasts, recommending U.S. sector allocations and developing and marketing the firm's quantitative equity strategy to institutional and individual clients.



CAROL SCHLEIF, CFA

Carol Schleif is the Deputy Chief Investment Officer of Asset Management at Abbot Downing where she is responsible for helping create and communicate the firm's Asset Management Strategy including designing and delivering the internal investment learning and development curriculum. She's actively involved in business development, overseeing the product management platform, and serves on the firm's Asset Allocation, Investment Themes, Investment Governance Editorial and Publication Content Committees.



NILI GILBERT, CFA

Nili Gilbert is Co-Founder and Portfolio Manager of Matarin Capital, with responsibility for hedge fund and long-only equity strategies. Matarin has been recognized as a performance leader and as a thought leader, with its research cited in such publications as *The Wall Street Journal* and *Barron's*. Prior to founding Matarin, she was Senior Director and Senior Research Analyst at Invesco, working in both New York City and Frankfurt, Germany, with responsibility for development of the firm's global multi-asset models.

MODERATOR

SHERRIE TRECKER, CFA

Serving as Moderator to this evening's dinner is Sherrie Trecker. A former board member to CFA Society Seattle, she is the current Chair to the CFA Society Seattle Women's Network. Sherrie's a consultant in Russell Investments' Americas Institutional business where she provides advice to institutional clients on all aspects of their investment programs including investment policy and strategy, governance, asset allocation, asset class structure, manager selection, performance monitoring, and investment implementation.