



# Chinese Finance Association of America

美国华人金融协会

*Chinese Finance Association of America cordially invites you to join us for*

## Success in CFA 2009

### Pre-Exam Round Table Discussion

This event is designed for people who are interested in the Chartered Financial Analyst (CFA) program or have been taking steps to obtain the CFA charter. You will have the opportunity to learn from industry veterans who have been a long time CFA charter holders, as well as candidates who have recently passed different levels of the CFA exams. There will be a great cross-section of CFA candidates/charter holders from different stages in their career and different parts of the industry for you to network and share experience with. Due to strong demand for this event, please be aware space is limited and CFAA members will have priority for admission.

**Wednesday, May 20, 2009**

**5:00 p.m. - 7:00 p.m.**

The Union League Club of Chicago  
Tudor Room, 7th Floor  
65 West Jackson Blvd  
Chicago, Illinois

#### **Panel One --- Insights from Long Time CFA Charter Holders**

**Topics: Who should take the CFA Exams?  
How will the CFA Charter help you to achieve your career goal?**

**Panelists:** Dr. Wei Li, CFA (Obtained CFA Charter in 1998) – Director of Research,  
Thomas White Asset Management  
Vivian Lin, CFA (Obtained CFA Charter in 2001) – Investment Analyst,  
UBS Global Asset Management  
Diana Sheu, CFA (Obtained CFA Charter in 2005) – Manager, Navigant Consulting Inc.

#### **Panel Two --- Experiences and Lessons from Successful CFA Candidates**

**Topics: What areas should you focus on to successfully pass each level of the exam?  
What are the experiences and lessons from the past exams?**

**Panelists:** Harry Gao, passed CFA Level 3 in 2008- Investment Analyst, Institutional Capital LLC  
Rui Zheng, Ph.D., passed CFA Level 2 in 2008 – Quantitative Investment Analyst,  
UBS Global Asset Management  
Cecilica Chung, passed CFA Level 1 in 2008 – International Coordinator, Morningstar, Inc.



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**Agenda:** 5:00 – 5:30pm Registration  
5:30 – 6:00pm Panel Discussions  
6:00 – 6:45pm Q&A Session  
6:45 – 7:30pm Networking and Conclusion

**Attire:** Business Casual, shirts with collar, no jeans and sneakers allowed.

**Fee:** CFAA Members – Free; Full-time Students \$5 (with valid student ID);  
RSVP Non-Students - \$8; Walk-in Non-Students - \$10  
(All payments are cash only)

**RSVP by 5/18/2009 to Rex Hong at [event@ChineseFinanceAssociation.org](mailto:event@ChineseFinanceAssociation.org)**