



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

2011 Chinese New Year Reception

As we bid farewell to a memorable year marked by global economic stabilization and a stock market rally, we welcome the new year of Rabbit. CFAA would like to provide you with a great opportunity to socialize and network with other finance professionals and learn from our distinguished keynote speakers, Peng Chen, Ph.D., CFA, President of Global Investment Management division at Morningstar on the topic of globalization and financial markets in the post-crisis world, and Mr. Thomas Bieke, Chief Credit Officer of The Private Bank about the current state and outlook of the US banking industry. You will meet some new friends, catch up with old acquaintances, enjoy the conversation and speeches, or just simply unwind over cocktails and Hors d'oeuvres. Don't miss this fun and wonderful event. We are looking forward to seeing you at the Reception.

Thursday, February 10, 2011

5:00 p.m. - 8:00 p.m.

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

Agenda: 5:00 – 5:30pm Registration
5:30 – 6:30pm Reception (Hors d'oeuvres served & cash bar)
6:30 – 6:35pm Welcome Speech by CFAA President Vivian Lin
6:35 – 7:05pm Speech by Dr. Peng Chen, President of Global Investment Management, Morningstar
7:05 – 7:10pm Presenting "CFAA 2010 Member of the Year Award"
7:10 – 7:40pm Speech by Mr. Thomas J. Bieke, Chief Credit Officer of The Private Bank
7:40 – 8:00pm Q&A and Conclusion

Fee: CFAA Member – \$15; Non-CFAA Member with online payment – \$22;
Walk-ins – \$30

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- Note:**
- Business casual attire is required, shirts with collar, no jeans and sneakers allowed.
 - No refunds will be issued unless the event is canceled.
 - CFAA members are defined as those who submitted CFAA membership forms and fees with confirmation from CFAA Board of Directors.

Speakers' Bio:

Peng Chen, Ph.D., CFA is president of Morningstar's global Investment Management division. He is responsible for overseeing the company's investment consulting, retirement advice, and investment management operations in North America, Europe, Asia, and Australia, including Morningstar Associates, Ibbotson Associates, Morningstar Investment Services, Old Broad Street Research, and Seeds Finance.

Chen joined Ibbotson Associates in 1997, and is one of the foremost authorities on asset allocation. He has played a key role in the development of Ibbotson's investment consulting and 401(k) advice/managed retirement account services. Prior to Morningstar's acquisition in March 2006, Chen served as managing director and chief investment officer for Ibbotson. Chen served as president of Ibbotson Associates, a registered investment advisor and wholly owned subsidiary of Morningstar, from August 2006 until November 2010.

A respected researcher, Chen has expertise in asset allocation, portfolio risk measurement, nontraditional assets, and global financial markets. His writings have appeared in the *Financial Analysts Journal*, *Journal of Portfolio Management*, *Journal of Investing*, *Journal of Financial Planning*, *Bank Securities Journal*, the *American Association of Individual Investors Journal*, *Consumer Interest Annual*, and the *Journal of Financial Counseling and Planning*. He received the "Articles of Excellence" award from the Certified Financial Planner Board in 1996 and Graham and Dodd Scroll award in 2003 and 2007 from the *Financial Analysts Journal*.

Chen holds a bachelor's degree in industrial management engineering from Harbin Institute of Technology and a master's degree and doctorate degree in consumer economics from Ohio State University. He also holds the Chartered Financial Analyst (CFA) designation.

Thomas J. Bieke is Managing Director and Chief Credit Officer at The Private Bank based in Chicago. Tom has spent the last 30 years in middle market commercial banking. He began his career in 1980 with American National Bank & Trust Co. of Chicago, at that time the leading middle market bank in the city. He joined LaSalle Bank (a subsidiary of Netherlands-based ABN AMRO Bank) in 1992. At the time of LaSalle's sale to Bank of America in 2007 he was responsible for the Bank's Regional and International Corporate Banking group. This group consisted of 21 offices across the country and in excess of \$10 billion of credit commitments. In 2007 he joined Fifth Third Bank to form a new National Commercial Banking unit which quickly established a new presence for the Bank in five northeast and southeast markets. In early 2009 he took on his present role as Managing Director and Chief Credit Officer for The Private Bank in Chicago. Tom received his Bachelor of Arts Degree (Economics) from Kalamazoo College in 1980 and his Master in Business Administration from the University of Chicago in 1991.



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About CFAA

Chinese Finance Association of America (CFAA) is an independent not-for-profit, non-partisan organization committed to promoting educational and cultural exchange among finance professionals between the United States and Greater China through facilitating communication and the exchange of ideas in the financial industry. Incorporated and headquartered in Chicago, Illinois, CFAA is aimed to serve Chinese finance professionals and others who are interested in the financial industry of Greater China. Please visit our website www.ChineseFinanceAssociation.org for more information about CFAA. To become a CFAA member, please fill out the [membership application form](#) online. If you are interested in the volunteering opportunities at CFAA, please submit the [volunteer and staff application form](#). For global career opportunities in finance, please visit our newly launched [Online Job Center](#) through our partnership with one of the leading global career placement companies eFinancialCareers.com.

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