



# 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 2012 CFA” Pre-CFA Exam Workshop

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 learning from seasoned finance professionals from various fields who have been a long time CFA charter holders. They will share with you their experiences and insights in preparing and taking the CFA exams, as well as how specifically being a CFA charter holder has helped them in their career development and success. This event will also provide a great opportunity for you to network with your fellow CFA candidates and charter holders from different areas in financial industry. Due to strong demand for this event, please be aware space is limited and CFAA members will have the priority for admission.

### Panelists

- **Dr. Wei Li**, CFA – Director of Research, Thomas White Asset Management
- **Vivian Lin**, CFA – Former Senior Investment Analyst, UBS Global Asset Management
- **Gary Wu**, CFA – Senior Vice President, BDT Capital Partners, LLC
- **David Tang**, CFA – Quantitative Analyst, Neuberger Berman Fixed Income LLC

**Thursday, May 17, 2012**

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

The Union League Club of Chicago  
Colonial Room 830, 8th Floor  
65 West Jackson Blvd  
Chicago, Illinois

**Agenda:** 5:00 – 5:45pm Registration & Networking  
5:45 – 6:45pm Pre-CFA Exam Workshop  
6:45 – 7:00pm Networking and Conclusion

**Fee:** CFAA Members & Full-time Students - \$8 (with valid student ID);  
Non-CFAA Members - \$13; Walk-ins - \$18

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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.

## **Panelists' Bio:**

**Dr. Wei Li**, CFA, is currently Executive Vice President, Director of Research and Assistant Chief Investment Officer of Thomas White International, Ltd., a private investment management and research firm in Chicago, Illinois. Wei is a member of Thomas White International's management team, overseeing its research department. His responsibilities include researching and implementing stock selection models, portfolio construction, asset allocation and performance attribution as well as new product development. Wei is also responsible for the research and portfolio management of the firm's investment in the Asian equities markets. Prior to joining TWI, Wei held teaching and research positions with McGill University in Canada and Rensselaer Polytechnic Institute in New York. Wei obtained his Ph.D. in mathematics from Purdue University in Indiana and MS from Nanjing University. He is a member of CFA Institute and served on the curriculum committee of the CFA Institute.

**Vivian Lin**, CFA, was an Executive Director and Senior Investment Analyst at UBS Global Asset Management. Her primary responsibilities include fundamental investment research on US food, beverage, tobacco, personal/household care and homebuilding/building products industries. Her prior experience with the firm was as an investment analyst for the consumer sectors in Latin America, Europe, Middle East, and Africa. She also covered wireless telecom and banking sectors in Latin America. Prior to joining UBS in 1999, Vivian worked for a Chinese trust and investment corporation based in Beijing. Vivian obtained her M.S. and M.A. degrees from University of Illinois at Urbana-Champaign and her bachelor's degree from Peking University. She is a member of CFA Institute and CFA Society of Chicago.

**Gary Wu**, CFA, is a Senior Vice President at BDT Capital Partners, LLC, responsible for research and analysis of investment opportunities as well as deal execution in the private equity field. Prior to joining BDTCP, Gary worked as a Securities Analyst at Legg Mason Capital Management (LMCM), a Co-Portfolio Manager of the LMCM Disciplined Equity Research Fund, and the team leader of the firm's research team for energy, materials, and utilities. Prior to that, Gary worked as a healthcare investment banker and a management consultant advising primarily Fortune 100 clients. Gary earned a Ph.D. degree in Molecular and Cellular Biology from Columbia University and he holds his Bachelor of Medicine degree from Peking University Medical School in China.

**Qi David Tang**, CFA, is a Quantitative Analyst and a member of the Investment Grade Team at Neuberger Berman Fixed Income LLC. Before joining the firm in 2011, David was a senior portfolio risk analyst at Fannie Mae. His previous experience includes working as a quantitative analyst at Allstate Investments and ABN AMRO. David earned an MBA with high honor from the University of Chicago, two Master degrees from Illinois State University and a BA from Renmin University of China.



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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](http://www.ChineseFinanceAssociation.org) for more information about CFAA. To become a CFAA member, or to renew your CFAA membership and make your membership payment, please go to the [membership section](#) on our website. 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.