



Chinese Finance Association of America

美国华人金融协会

Chinese Finance Association of America (CFAA) & DePaul University Kellstadt Finance Community (KFC) cordially invite you to join us for a feature presentation

“Looking Beyond the Stars: A Discussion on Mutual Fund Industry Trends”

Featuring



David Falkof

**Fund Analyst, Fund-of-Funds Research
Morningstar, Inc.**

With more than \$13 trillion asset under management, the U.S. mutual fund industry plays a significant role in the U.S. economy and world financial markets. These funds serve more than 92 million U.S. investors and supplied investment capital in securities markets around the world. So what are the trends of the capital flow and demand in the mutual fund industry? How do those mutual funds invest and allocate capital to different asset classes and geographies? What are the critical factors that individual investors should consider when selecting mutual funds for their personal investment? Who are the best performing mutual funds in recent history? What are the opportunities and challenges for Emerging Markets focused mutual funds? In this presentation, you will learn about these topics in details from our speaker Mr. David Falkof, an experienced mutual fund analyst at Morningstar.

Wednesday, March 20th, 2013

5:00 p.m. – 7:00 p.m.

The Union League Club of Chicago
Tudor Room 710, 7th Floor
65 West Jackson Blvd
Chicago, Illinois



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Agenda: 5:00 – 5:30pm Registration
5:30 – 6:00pm Networking
6:00 – 6:40pm Formal speech
6:40 – 7:00pm Q&A

Fee: CFAA/KFC Member – \$8; Non-CFAA/KFC Member with online payment - \$13; Walk-ins - \$18

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Note:

- [Business casual attire is required, shirts with collar, no jeans or sneakers allowed.](#)
- No refunds will be issued unless the event is canceled.
- CFAA and KFC members are defined as those who submitted membership forms and fees with confirmation from the governing bodies of the respective organizations.

Speakers' Bio:

David Falkof is a fund analyst on the fund-of-funds research team for Morningstar and has been with the company since 2009. He covers primarily target-date fund series, particularly those offered by Vanguard, T. Rowe Price, Schwab, and AllianceBernstein. He also covers other fund of funds and allocation strategies, as well as 529 college savings plans. In addition, Falkof covers the fixed-income lineup of JPMorgan, Prudential Jennison's equity funds, and international and emerging-markets bond funds.

Falkof holds a bachelor's degree in economics from Bowdoin College. He is a Level III candidate for the Chartered Financial Analyst (CFA) designation.

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, 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.



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About KFC

Kellstadt Finance Community (KFC), the only official group for master-level finance students at DePaul Kellstadt Graduate School of Business. It was founded in May, 2011 by Joyce (Xiran) Chen and aims to help students build up a bridge to the real finance world. Basically, KFC has one topic in the financial industry per month and arranges networking events or seminars accordingly.