



Chinese Finance Association of America

美国华人金融协会

Chinese Finance Association of America (CFAA) invites you to join us for

Fundamental Mortgage Investment Workshop

Featuring



Qi David Tang, CFA,
Vice President and Quantitative Analyst,
Global Rates, Neuberger Berman



Chantal Zhang, CFA,
Vice President and Research Analyst,
Mortgage Credit, Neuberger Berman

Program Description: Mortgages, the fixed income asset class known for its complexity and opacity, was often at the center of the storm in every past credit cycles. Non-agency mortgages were also the catalyst for the 2008 Great Recession. How professional investors analyze them? What are the risks? Why it is hard to predict its behavior? What role did it play in the last recession? What are the quantitative and fundamental analysis tools investors use? How does it fit into a portfolio? Where is the asset class going with all the actions from the Federal Reserve, the legislation and the administration? As part of CFAA's investment management event series, this workshop is designed to cover these topics related in a highly interactive and detailed fashion.

Speaker's Bio: Qi David Tang, CFA, Vice President, Neuberger Berman. David is a Quantitative Analyst on the Global Rates team. He also co-manages the firm's Investment Grade index portfolios. Before joining the firm, David was a risk analyst at Fannie Mae responsible for hedging the rate risk of Fannie Mae's retained mortgage portfolio. Previous experience includes working as a quantitative analyst at Allstate Investments and ABN AMRO. David earned an MBA from the University of Chicago, two other Master degrees in Economics and in Computer Science, respectively, and a BA from Renmin University of China. David is currently a member of the CFA Institute and CFA Society of Chicago. David is a Director of the CFAA Board of Directors.

Chantal Zhang, CFA, Vice President, Neuberger Berman. Chantal is a research analyst on the Mortgage Credit Team. Her prior experience includes working with Claymore Securities as an analyst. She earned a MS in Financial Markets from Illinois Institute of Technology and a BS in Computer Science from the Beijing Institute of Technology. Chantal is currently a member of the CFA Institute and CFA Society of Chicago.



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Thursday, April 17, 2014

5:00 p.m. – 8:00 p.m.

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

Chicago, Illinois

Agenda: 5:00 – 6:00pm Registration
6:00 – 8:00pm Workshop including Q&A

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

Pay Online Now

- 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 members are defined as those who submitted CFAA membership forms and fees with confirmation from CFAA Board of Directors.

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.