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\* Denotes Members of the 2007-2008 Board of Directors  
 + Denotes Members of the 2007-2008 Forecast Dinner Committee

### Officers 2007-2008

President	L. Alan Smith, CFA
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Secretary	Gene Morse, CFA
Treasurer	Tony D. Edwards, CFA



January 31, 2008

# 5th Annual Forecast Dinner

Mississippi's premier event for serious investors and business leaders



### Schedule of Events:

Cocktail Reception

5:30 PM - 6:30 PM

Dinner

6:30 PM - 7:15 PM

Forecast Program

7:15 PM - 8:30 PM

Presenting Sponsor

**FACTSET**  
Fixed Income Analytics

## Moderator and Experts:

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### Moderator

**Tate Reeves, CFA**

**State Treasurer for Mississippi**

Tate Reeves was elected as Mississippi's fifty-third and first Republican Treasurer in 2003. Reeves is an alumnus of Millsaps College and holds a Chartered Financial Analyst designation. Prior to becoming Treasurer, Reeves was a member of the Trustmark Investment Strategy Committee and served as an Assistant Vice President for AmSouth. Reeves currently serves as the national president for the National Association of State Treasurers (NAST) and Chairman of the Investment Committee, a Member of the Board of Directors of the Public Employee's Retirement System and Chairman of the Board of Directors of College Savings Plans of Mississippi and the Health Care Trust Fund.



### Fixed Income Expert

**Chris Mahony**

**Director and Product Specialist, BlackRock Fixed Income**

Chris Mahony, Director and product specialist, is a member of BlackRock's Account Management Group on the Fixed Income team that provides a link between the investment teams and account managers. Prior to joining BlackRock, he was a Senior Vice President, Investment Officer of J. & W. Seligman & Co. Inc. and Head of the Seligman Investment Grade Team. He served as Portfolio Manager of Seligman Cash Management Fund, Seligman U.S. Government Securities Fund, and Seligman Investment Grade Fixed Income Fund. Mahony was Co-Portfolio Manager of the fixed income portion of Seligman Income and Growth Fund. Additionally, he served as Portfolio Manager for all institutional Core and Core Plus mandates managed by J. & W. Seligman. He has 20 years of investment management experience.

Mahony graduated with a B.A. degree from Ohio Wesleyan University in Ohio, where he majored in Politics and Government. He is currently working towards his MBA in Finance and is Series 7 and Series 63 certified.



### Equity Expert

**Ronald H. Muhlenkamp, CFA**

**Founder, President and Portfolio Manager**

**Muhlenkamp & Company, Inc.**

Muhlenkamp & Company, Inc. was established in 1977 to manage private accounts for individuals and institutions. In 1988, it launched a no-load mutual fund as an investment vehicle for all investors, no matter their asset size.

A top-rated investment manager, frequent guest of the media, and featured speaker at investment shows nationwide, Muhlenkamp's entire business career as been devoted to the professional management of investment portfolios. His work since 1968 has been focused on extensive studies of investment management philosophies, both fundamental and technical. As a result of his research, he developed a proprietary method of evaluating both equity and fixed income securities, which continues to be employed by Muhlenkamp & Company. In addition to publishing his quarterly newsletter, *Muhlenkamp Memorandum*, he is the author of *Ron's Road to Wealth: Insights for the Curious Investor*.

Muhlenkamp received a Bachelor of Science degree in Engineering from M.I.T. in 1966, and a Masters of Business Administration from the Harvard Business School in 1968. He holds a Chartered Financial Analyst designation.



### Economy Expert

**Jerry Webman, PhD, CFA**

**Chief Economist, OppenheimerFunds**

Dr. Jerry Webman is a Senior Investment Officer and Chief Economist for OppenheimerFunds, Inc. In this capacity, Dr. Webman provides strategic viewpoints on the overall financial and economic markets to investment management and the financial advisor and investor communities. In addition, he serves as Director of Fixed Income, where he oversees portfolio managers, analysts and traders managing over \$100 billion in fixed income assets.

For over 20 years, Dr. Webman has been involved in the investment and economic markets—as a researcher, a financial advisor and a portfolio manager.

Dr. Webman holds a B.A. in political science, with honors, from the University of Chicago, where he graduated Phi Beta Kappa, and a PhD in political science from Yale University. He holds a Chartered Financial Analyst designation.



### Mississippi Expert

**William Martin Wiseman, PhD**

**Director, John C. Stennis Institute of Government**

**Professor of Political Science, Mississippi State University**

Marty Wiseman received his PhD in 1986, his MPPA in 1980, his MS in 1974, and his BA in 1973, all awarded from Mississippi State University. In addition to his duties at Mississippi State, he is a guest professor at Jackson State University.

Wiseman has had articles published in *Public Productivity and Management Review*, *Mid-South Journal of Political Science*, *Public Administration Quarterly*, *International Journal of Public Administration* and others. He has also published numerous research and technical assistance reports.

Wiseman is a sought-after speaker on state and local government, particularly in Mississippi, and rural development. Often a guest editorial writer in Mississippi daily and weekly newspapers, he also evaluates federal, state and local election results for all media. He serves as a committee member on Civil Rights Commission on Education, the Mississippi Economic Policy Center Advisory Council, and the Delta Early Learning Leadership Initiative. He also serves as Chair of the Wood Institute Board of Directors.



[www.cfamississippi.org](http://www.cfamississippi.org)

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**Mission: To lead the investment profession globally by setting the highest standards of ethics, education, and professional excellence.**

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## 5<sup>th</sup> Annual Forecast Dinner ~ January 31, 2008 REGISTRATION FORM

Name \_\_\_\_\_ Firm \_\_\_\_\_

Address \_\_\_\_\_ Zip Code \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

Sponsorship Level	Price		#		Subtotal
Level I	\$680	X		=	
Level II	\$3,000	X		=	
Level III	\$5,000	X		=	
Presenting Sponsorship	\$2,500	X		=	
Additional Tables for Level III & Presenting Sponsors	\$575	X		=	
Individual Reservations	\$85	X		=	
Total Payment Enclosed					\$

Please indicate if you are interested in donating a number of seats at your table to local college students: \_\_\_ Yes \_\_\_ No

*For reservations, send this completed registration form with your check payable to:*

*CFA Society of Mississippi  
Tony Edwards, CFA  
c/o BankPlus  
1168 Highland Colony Parkway, Suite 200  
Ridgeland, MS 39157*

*Registration forms must be received by January 14, 2008.  
Reservations limited to 430.*

### Sponsorship Levels:

**Level I: Table Sponsor \$680**

Includes 1 table of 8 and listing in program

**Level II: Table and Ad Sponsor \$3,000**

Includes 3 tables of 8, listing in program and logo on program

**Level III: Table and Ad Sponsor \$5,000**

Includes 5 tables of 8, listing in program, logo on program, name on sponsorship sign at dinner, public recognition at dinner, and prominent logo recognition on ads

**Presenting Sponsorship \$2,500**

Includes public recognition at dinner, prominent logo recognition on ads and website, quarter page ad in program, and signage at entrance and reception areas during event