



# CHARITY EDUCATION EVENT

Investment Outlook and the Impact of Changes in the Regulatory Environment

**WHAT:**

Pre-Panel Reception 3 pm - 4 pm  
Panel Discussion 4 pm - 6 pm  
Cocktail Hour 6 pm - 7:15pm  
Sponsor Dinner 7:30pm

**WHEN:**

Thursday, May 12<sup>th</sup>

**WHERE:**

Hotel Crescent Court  
400 Crescent Court  
Dallas, TX 75201

**CONTACTS:**

Amy Austin  
[aaustin@carlsoncapital.com](mailto:aaustin@carlsoncapital.com)

Christine Breck  
[christineb@source-trading.com](mailto:christineb@source-trading.com)

Cindy Brown  
[cindy.g.brown@jpmorgan.com](mailto:cindy.g.brown@jpmorgan.com)

March 2, 2010

Dear Prospective Sponsor,

TEXAS WALL STREET WOMEN (TXWSW) invites you to become a sponsor of our first annual Charity Education Event on May 12, 2010, benefiting the Foundation for the Education of Young Women. As an exclusive peer network of professional women in the investment management business, we are committed to mentoring and supporting women throughout their careers. It is also our mission to make a positive difference in our communities by supporting the education of young women in Texas. Investing in their education reaps a double dividend - an educated girl will become a woman who earns more money and respect for her family, who spends more on schools for her own children - who tips the balance from poverty to progress. We, the TXWSW, have volunteered our time and passion to their future. We are asking you to help us change the outcome for these underserved young women, most of whom come from economically disadvantaged homes and will be the first in their families to attend college.

On May 12, 2010, the Education Committee will host a dynamic Panel Discussion and Sponsor Dinner featuring Outstanding Women in finance today and moderated by Dr. Jill Foote (see bios below). The focus of the discussion will be the Investment Outlook and the Impact of Changes in the Regulatory Environment. Given the recent and expected changes under the current government administration, we believe this will be a very timely and interesting topic.

Our committee will be extending invitations to this event to the over 700 TXWSW members as well as the Texas financial and business community as a whole. We anticipate an attendance of 200-250 professionals. In addition to the panel discussion, we will host a pre-panel reception as well as a cocktail hour after the discussion. All sponsors will also receive an exclusive invitation to dinner with the speakers following the panel presentation. As a non-profit organization, we rely on corporate sponsors, such as yourselves, as the primary source of funding for this event.



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In order to attend the event, all attendees will make a donation to support the Foundation for the Education of Young Women, which is a 501(c) (3) organization with the mission to support single-sex, college preparatory, public education in Texas that will give young women in urban schools the academic skills to achieve success in college and in life by thinking critically, leading purposefully, and living active, healthy and responsible lives. The goal of the Foundation for the Education of Young Women is to have one hundred percent of the students in its sponsored schools to not only graduate from high school but to attend and graduate from college. The majority of these young women will be the first in their families to complete high school, much less consider attending college. Currently, the Foundation is serving over 1,000 young women in its sponsored schools in Dallas, Austin, San Antonio, and Lubbock. These schools are the ONLY all female public schools in Texas. For more information on this deserving organization, please logon to their website at [www.feyw.org](http://www.feyw.org)

Your sponsorship will assure the success of the event. There are many opportunities and great rewards available. Enclosed please find additional information about this exciting event and its sponsorship levels as well as a response card. Please do not hesitate to contact one of the members listed to the left with any questions.

Sincerely,  
Texas Wall Street Women Education Committee

Melissa Anderson, Meritage Capital, L.P.  
Amy Austin, Carlson Capital, L.P.  
Leah R. Bennett, King Investment Advisors, Inc.  
Gina Betts, Locke, Lord, Bissell and Liddell  
Cindy Brown, J.P. Morgan Prime Brokerage  
Carol Coale, DRG&E  
Laura Haley, Bley Investment Group, Inc

Allison Hermann  
Tina L. Hernandez, Tugar Capital  
Ivana Kovacevic Rouse, Akin Gump Strauss Hauer & Feld, LLP  
Linda Shirkey, The Advisor's Resource  
Barbara Stewart, BBVA Wealth Management  
Orly Sulami, Haynes and Boone, LLP



# SPONSORSHIP LEVELS

Please reserve by April 28, 2010

**SUMMA CUM LAUDE**  
\$10,000

Includes logo placement on event signage and acknowledgement as a Summa Cum Laude Sponsor on our website and in Event program; opportunity to display corporate materials at Event; corporate name recognition and/or logo on favors distributed to attendees; reserved seating at the Panel Discussion; premier seating for 12 guests at the Sponsor Dinner; selection of speaker to dine with you and your guests at your table\*; separate sponsor check-in at event; complimentary Valet Parking

**MAGNA CUM LAUDE**  
\$5,000

Includes logo placement on event signage and acknowledgement as a Magna Cum Laude Sponsor on our website and in Event program; opportunity to display corporate materials at Event; reserved seating at the Panel Discussion; premier seating for 5 guests at the Sponsor Dinner; selection of speaker to dine with you and your guests at your table\*; separate sponsor check-in at event; complimentary Valet Parking

**CUM LAUDE**  
\$2,000

Includes acknowledgement as a Cum Laude Sponsor on our website and Event program; reserved seating for 2 guests at the Sponsor Dinner; separate sponsor check-in at event; complimentary Valet Parking

**DEANS' LIST**  
\$1,000

Includes acknowledgement as a Deans' List Sponsor on our website and Event program; reserved seating for 1 guest at the Sponsor Dinner; separate sponsor check-in at event; complimentary Valet Parking

**DONATION**

If you are unable to attend the Event and/or Dinner and would like to support the Foundation for the Education of Young Women, please contribute using the enclosed response card or on the TXWSW website's Giving page.

<http://www.txsw.com/giving.php>

*\* Selection of speaker to join you and your guests at dinner will be on a first come, first serve basis. Sign up early to get your first choice!*



# RESPONSE CARD

Please reserve by April 28, 2010

**CORPORATE NAME**  
(AS IT SHOULD APPEAR ON  
PRINTED MATERIALS)

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**CONTACT NAME**

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**MAILING ADDRESS**

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**CITY/STATE/ZIP**

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**PHONE/FAX**

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**EMAIL**

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**SPONSOR  
SELECTION**

- \$10,000 - Summa Cum Laude     \$2,000 - Cum Laude     Donation \$ \_\_\_\_\_  
 \$ 5,000 - Magna Cum Laude     \$1,000 - Deans' List

Please make checks payable to **Texas Wall Street Women** and return along with this response card to the following address:  
2200 Ross Avenue, Suite 1600, Dallas, TX 75201; Attention: Charla Parette



# BIOGRAPHIES

## Panelists

**SUSAN M. BYRNE**  
WESTWOOD HOLDINGS  
GROUP, INC.

Susan M. Byrne is the Founder, Chairman and Chief Investment Officer of Westwood Management Corp., a registered investment advisor. Founded in 1983, Westwood serves a variety of institutional clients, such as corporate pension funds, religious organizations, endowments and foundations. In addition, Westwood is the investment advisor to The WHG Funds, a family of open-ended mutual funds. Westwood Management currently manages over \$10 billion in assets.

Ms. Byrne currently serves on the board of the Presbyterian Communities and Services Foundation. She is a former board member of UTIMCO, a private non-profit company that manages approximately \$19.3 billion in public funds, City of Dallas Employees Retirement Fund, The Governor's Business Council and the Dallas Citizens Council.

Ms. Byrne is a member of both the New York and Dallas Societies of Securities Analysts. She is a frequent guest on CNBC and has been featured in numerous financial publications such as; *Barrons*, *Smart Money*, *Wall Street Journal*, *Kiplinger's* and *Fortune*. Ms. Byrne has over thirty-nine years of Wall Street, portfolio management and plan sponsor experience.

**AMY BALLEW**  
CARLSON CAPITAL, LP

Amy Ballew is the Managing Director of the healthcare portfolio within the relative value strategy at Carlson Capital, L.P., a multi-strategy hedge fund headquartered in Dallas, TX. Ms. Ballew joined Carlson Capital in 2002. She began her career as a Product Manager at the software company TenFold and as a management consultant for The Boston Consulting Group. Ms. Ballew earned a Bachelor of Science degree in Mechanical Engineering with honors from Rice University and a Masters of Business Administration with honors from Kellogg School of Management at Northwestern University.

**SUSAN L. FISH, CPA**  
THE ROSEWOOD  
CORPORATION

Susan Fish is the Chief Financial Officer of The Rosewood Corporation, a private holding company with worldwide operations and investments in oil and gas, real estate, and hospitality industries. Ms. Fish is also the President of Rosewood Property Company, which is responsible for the real estate line of business of The Rosewood Corporation. Ms. Fish joined Rosewood in 1998 and took over the leadership for Rosewood Property Company in 2007. She began her career as a Tax professional for Arthur Andersen & Co. and for Crow Family Holdings. Ms. Fish earned a Masters of Accounting Science degree, specializing in taxation and a Bachelor of Science degree in Accounting with honors from the University of Illinois. She is a CPA, licensed in Texas. Ms. Fish serves on the Executive Committee for the Dean's Business Council for the College of Business at the University of Illinois.



# BIOGRAPHIES

## Panelists

**CATHY IBERG, CPA**  
UTIMCO

Cathy Iberg is the President, Deputy CIO and Managing Director of Marketable Alternative Investments for The University of Texas Investment Management Company (UTIMCO). UTIMCO was established in 1996 to manage the endowment and pension assets for the University of Texas and Texas A&M Systems. Ms. Iberg began her career at UTIMCO in April of 1991 when she joined U.T. System Office of Asset Management, the predecessor of UTIMCO. Prior to assuming her current position, Ms. Iberg has served in various senior management positions with the organization, including interim appointments as Chief Executive Officer. She is a CPA and practiced in the area of public accounting for 15 years. Ms. Iberg holds a Bachelor of Science degree in accounting.

**MARI KOOI**  
WOLF ASSET MANAGEMENT  
INTERNATIONAL LLC

Mari Kooi is the CEO and Founder of Wolf Asset Management International LLC. Kooi spent 18 years at Cargill Inc., working as a trader, trading manager and president of Cargill Asset Management. In 1984, Kooi became one of the founding investment managers of Cargill's in-house hedge fund, later spun out as the Black River Fund. She also developed a number of innovative investment products as president of Cargill Asset Management. Kooi founded and presides over the New Mexico Financial Services Task Force. Several art organizations have benefited from Kooi's governance, including the Minnesota Museum of American Art, which twice named her Trustee of the Year. She is active in Site Santa Fe and The Santa Fe Institute. Kooi is the author of the "Sopa Piranha," a quarterly market commentary and has published widely on hedge fund investing. She holds a master's degree in finance from the University of Minnesota.

**PAM NOBLE, CFA**  
DIMENSIONAL FUND  
ADVISORS

Pamela Noble is a portfolio manager with Dimensional Fund Advisors and a member of the fixed income team that manages over \$30 billion in assets. Prior to joining Dimensional, she was Vice President and portfolio manager with USAA Investment Management Company with responsibilities for over \$4 billion of fixed income investments. In recognition of her excellent performance record, she was awarded the Top Manager Award by *The Money Fund Report* in 2003, 2004, and 2005. Ms. Noble has earned the Chartered Financial Analyst designation and is a member of the CFA Institute and serves as Secretary of the Austin Society. She has a Masters of Business Administration degree with honors from Texas Christian University and a Bachelor of Science degree from Louisiana Tech University.



# BIOGRAPHIES

## Panelists

**BECKY ROOF, CMA,  
CIRA, CPA**  
ALIX PARTNERS

Becky Roof brings a unique perspective to her turnaround and crisis management engagements. With over 25 years of experience, her credentials consist of an equal blend of corporate and consulting experience. Becky's tenure as vice president and CFO of a Houston-based oilfield services company provides her with an enhanced perspective of the corporate and operating issues faced by management, other stakeholders and their representatives. She also possesses an extensive consulting background providing interim and crisis management to troubled and underperforming companies in a broad array of industries. Prior to joining AlixPartners, Becky was a director in the corporate finance, regeneration and disputes practice for PricewaterhouseCoopers. Previously, she provided litigation support, fraud investigative work, and corporate recovery consulting services for Ernst & Young LLP.

Becky is a Certified Management Accountant, a Certified Insolvency & Restructuring Advisor, and a CPA (licensed in Texas). She earned a Bachelor of Science degree in business administration and Bachelor of Arts degree in geology from Trinity University, where she was a university scholar. She is a member of the Turnaround Management Association, the American Institute of Certified Public Accountants, and is on the Board of Directors of the American Bankruptcy Institute.



# BIOGRAPHIES

Moderator

**JILL FOOTE, PHD,  
CFA**

EL PASO CORPORATION  
FINANCE CENTER

M.A. WRIGHT FUND

RICE UNIVERSITY

Jill Foote is Director of the El Paso Corporation Finance Center, Director of the M.A. Wright Fund (the MBA student-managed investment portfolio), and Senior Lecturer in Finance at Rice University's Jesse H. Jones Graduate School of Management. Her principal teaching responsibilities are in investment management. She is also the faculty advisor to the Rice Finance Club and is Director of the Rice Summer Business Institute for high school students from Houston's low and moderate income communities.

Dr. Foote has 13 years of experience from Goldman Sachs in New York. Her final seven years there were spent as a Vice President, managing projects covering strategic initiatives, new business ventures, risk management, and operational, regulatory, and financial audits and risk reviews. The first six years were spent as a sales associate in Fixed Income – first in Money Markets, then in Emerging Debt.

Dr. Foote has earned the right to use the Chartered Financial Analyst designation and is a member of the CFA Institute and the CFA-Houston Society.