Portfolio Concepts and Management

Wharton UNIVERSITY of PENNSYLVANIA
Aresty Institute of Executive Education

Monday, April 20 - Thursday, April 23, 2020
The Wharton School University of Pennsylvania,
Philadelphia, PA

Portfolio management is a complex task with numerous decisions on how to allocate money in your fund. Portfolio Concepts and Management provides the core principles of portfolio theory and investment performance measurement, offering practical tools and experiences to help you make reliable investment management decisions. This program offers lecture/discussion sessions, problem solving exercises and small-group case study sessions in a 3½-day format. Grow confidence in your ability to evaluate investments with a broad, fundamental understanding of investment products and practices.

Register by March 9, 2020 to Save US$300!

Outline

- Introduction and Overview of Financial Assets
- Fundamentals of Portfolio Theory
- Performance Evaluation
- Fundamentals of Valuation
- Managing Pensions in a Risky Global Environment
- Macroeconomic Issues and Financial Markets
- Asset Allocation and Impacts of Risk on Return

Educational Program Director, Tiffany Ulbing introduces these Investment

Management Programs.

Benefits of Attending

- Learn the fundamental concepts needed for effective portfolio oversight.
- Obtain a solid grounding in the principles of modern portfolio theory.
- Gain practical experience needed to make sound investment management decisions.
- Apply what you have learned in an interactive case study.
- Learn from world-class faculty who are skilled educators and researchers, award-winning authors and leading authorities.

This program is intended for those who have little experience with investment-related course work.

Fiduciaries from both defined benefit and defined contribution plans who represent various industries, sizes and geographic areas (United States and Canada), including

- Multiemployer and public plan trustees
- Administrators and fund staff
- Human resources and benefits professionals
- Corporate officers and executives
- Finance personnel
- Investment professionals

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Continuing Education

Programs sponsored by the International Foundation of Employee Benefit Plans are consistently accepted for credit by agencies governing continuing education for license renewal and professional recertification.

For additional information, visit our continuing education (CE) web page or contact us by phone at (262) 786-6710, option 2.

CEBS COMPLIANCE APPROVED

Educational sessions at this program may qualify for CEBS continuing professional education (CPE) credit. Visit www.cebs.org/compliance for more information.

Registration Information

Register early and save!

	Member	Nonmember
Through 3/9/2020	US $5,495.00	US $5,935.00
After 3/9/2020	US $5,795.00	US $6,235.00

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